Review Outside Interests in M-Inform

Unit Reviewers are responsible for reviewing and approving outside interest disclosures for all personnel in their division, department, or unit (as applicable) who are required to disclose. As a reviewer, you also have the ability to assign another reviewer to an individual (i.e., a Special Reviewer).

This document is divided into the following sections:

- Overview: Reviewer Home Workspace
- Batch Review “No Outside Activities Disclosed”
- Review a Disclosure with Outside Activities disclosed
- Assign a Special Reviewer
- Send Reminder Emails for Missing Disclosures

Log In to M-Inform

Wolverine Access (https://wolverineaccess.umich.edu/) > Faculty & Staff tab > University Business menu > M-Inform (Disclosure System)

Log in with your uniqname and UMICH password. An M-Token is not required.

Overview: Reviewer Home Workspace

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<thead>
<tr>
<th>Letter</th>
<th>Section/Link/Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>My Roles</td>
<td>Your available “system roles.” The currently selected role displays bold.</td>
</tr>
<tr>
<td>B</td>
<td>Disclosures Pending Review tab</td>
<td>Displays all submitted disclosures ready for your review.</td>
</tr>
<tr>
<td>C</td>
<td>Department Review Complete</td>
<td>Displays disclosures for which department review has been completed.</td>
</tr>
<tr>
<td>D</td>
<td>Disclosers Under My Review tab</td>
<td>Displays all personnel for whom you are the designated Unit Reviewer and shows whether or not they are under management as the result of a project. You can also view details of individual disclosers, including COI Management Plans, and assign Special Reviewers.</td>
</tr>
<tr>
<td>E</td>
<td>Batch Review of No Outside Activities Disclosed tab</td>
<td>Allows you to batch approve all personnel who have submitted a disclosure indicating “no outside activities.” Because these usually represent the biggest volume, we recommend starting here.</td>
</tr>
<tr>
<td>F</td>
<td>Send Reminder Emails for Missing Disclosures tab</td>
<td>Allows you to email individuals listed on the Disclosers Under My Review tab who have not yet submitted an Annual Disclosure.</td>
</tr>
</tbody>
</table>
Unit Reviewer
Review Outside Interests in M-Inform
Step-By-Step Procedure

<table>
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<td>G</td>
<td>Ombud tab</td>
<td>Displays Management Plans where you are listed as an Ombuds.</td>
</tr>
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</table>
| H      | Disclosure records ready for review | A record may contain one or more outside interest disclosure. There are currently two types of disclosure records in M-Inform:  
  • Annual – to update previous fiscal year outside interest for annual review.  
  • Update – to add a new outside interest or change an existing one after the annual review is complete. |
| I      | My Home              | Click at any time to return to your Home Workspace.                                                                                           |
| J      | Logoff               | Sign out of M-Inform.                                                                                                                         |

Batch Review “No Outside Activities Disclosed”
Reviewers have the ability to approve disclosure records that indicate “No Outside Activities” in batches rather than having to approve each record individually. The Batch Review of No Outside Activities Disclosed tab in your Home Workspace lists all submitted disclosure records for which you are the assigned reviewer in which the Discloser indicated “None” to the Related Outside Activities question (i.e., they don’t have an outside interest related to their U-M responsibilities). Because these usually represent the biggest volume, we recommend starting here.

Home Workspace > “Batch Review…” tab

1. Click the “Batch Review…” tab.
2. As applicable, uncheck the checkboxes next to individuals whose disclosure record you do not wish to approve at this time.
3. Click Approve.

Upon successful completion, the selected names will disappear from the list.

Review a Disclosure with Outside Activities Disclosed
When a disclosure is submitted and you are the assigned reviewer, it displays in the “To Be Reviewed” list on the Disclosures Pending Review tab in your Home Workspace.

Home Workspace > Disclosures Pending Review tab

1. Click the Name of the disclosure record you wish to review.
Disclosure Review Workspace

The Disclosure Review Workspace opens. Note that the disclosure record’s state is Department Review.

2. Review any disclosed Outside Activities in the “My Disclosures” list on the Summary tab.

Note: The following options are available to assist your review:

- **View link** – Displays the discloser’s answers to the questions in the disclosure form.
- **Documents tab** – Lists any Management Plans, Financial Conflict of Interest (FCOI) Reports, and Subrecipient Disclosure Forms, if present.
- **History tab** – Log of previous actions taken on the Disclosure Record.

Reviewer Request Changes Activity

If one or more outside interest requires changes, return the record to the Discloser:

3. Click the **Reviewer Requests Changes** activity.

4. Describe the requested changes in the Comments field in the Review Request Changes window.

5. Click **OK**.

Notes:

- The system sends an email notification from you containing your Comments to the discloser.
- The status of the Disclosure Record changes to Department Review: Response Pending and the activity is recorded in the Activity History.
- The record is removed from your Disclosures Pending Review tab. It will reappear on the tab once the discloser resubmits their Disclosure Record.
Approve Activity

6. Click the **Approve** activity to approve all of the reported outside interests in the disclosure record.

7. If desired, enter Comments for the discloser.

   **Note:** Approval comments appear in the **Activity History**.

8. Click **OK**.

Assign a Special Reviewer

Depending on the circumstances, a Reviewer may find it necessary to assign a different Unit Reviewer to an individual.

**Home Workspace > Discloser Under My Review tab**

1. Click the **Disclosers Under My Review** tab.

2. In the **Assign Reviewer** column, click **Edit** in the row of the individual for whom you wish to assign a Special Reviewer.

**Assign Reviewer Window**

3. Click the **Override Department Reviewer** checkbox.

4. Type the Special Reviewer’s name and then select it from the list of matching values.

5. Enter your rationale for overriding the department reviewer and assigning another reviewer.

6. Click **OK**.
Disclosers Under My Review tab

Note that the last name of the assigned **Special Reviewer** now displays on the selected Discloser’s row.

Send Reminder Emails for Missing Disclosures

The “Send Reminder Emails…” tab lists all personnel required to disclose within your department and who have not yet submitted an Annual Disclosure in M-Inform. Reviewers can select recipients and send emails to remind them to disclose.

Home Workspace > “Send Reminder Emails…” tab

1. Click the “Send Reminder Emails…” tab.
2. Uncheck any individuals you do not wish to email.
3. Enter a subject line for the email in the **Subject** field.
4. Enter the desired message in the **Text** field.
5. Click **Send Email**.

A limit of 100 names displays per page. You may need to scroll down to see the Subject and Text fields.

If applicable, click the arrow to view additional pages.

To sort the list, click a column heading (e.g., Last Name).