Manage Departments, Disclosers, and Roles in M-Inform

Department Administrators are responsible for maintaining the role assignments in M-Inform to ensure appropriate workflow for the review of outside interest disclosures within your unit, division, or department. Your access also includes the ability to act as an individual's disclosure proxy (i.e., Department Assistant) and send reminder emails in M-Inform to disclosers to facilitate the process.

This procedure includes instructions to:

- Assign M-Inform roles for a department
- Assign Special Reviewers to an individual discloser
- Send reminder emails to disclosers through M-Inform
- Review new departments

For instructions on the Department Assistant tasks, see the Prepare or Update Outside Interest Disclosures in M-Inform as a Proxy procedure.

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.

Manage Department Information (Assign Department Roles)

The My Departments tab is used to maintain the default role assignments for a unit, division, or department. Any role (e.g., Reviewer) you set at the unit (i.e., school/college/organization) level automatically has the ability to complete the tasks for that role for the divisions and departments that roll-up to that unit.

There must be at least one Department Administrator for a unit in M-Inform.

Home Workspace > My Departments tab

1. Click the Department role or verified it is selected (not shown).
2. Click the My Departments tab.
3. Click Edit in the Manage Dept column for the applicable department.
Manage Department Information Window

For each M-Inform role, as applicable:

4. Enter the uniqname or the last name of the individual in the space next to the appropriate role.

5. As you enter a name, the system displays a list of matching values. Select the applicable name from the list.

Note: The selected name appears in the list for the role.

6. Repeat steps 5-6 for each role you need to assign.

7. To delete an individual from a particular role, click Remove in the row containing their name.

8. Click OK.

Assign a Special Reviewer to a Discloser

In some cases, the default reviewer for the unit, division, or department may not be the appropriate individual for a particular discloser (e.g., the dean of a school should not review his/her own outside interest disclosure). As a Department Administrator in M-Inform, you can assign another individual to be a “Special Reviewer.”

Home Workspace > My Disclosers tab

1. Click the My Disclosers tab.

2. Click Edit in the Manage Reviewer column for the applicable individual.
Assign Reviewer Window

3. Click the **Override Department Reviewer** checkbox.
4. Enter the uniqname or the last name of the individual in the space next to the appropriate role, and then select the applicable name from the list of matching values.
5. Click **OK**.

The last name of the Special Reviewer assigned to the discloser appears on the **My Disclosers** list (not shown).

Send Reminder Emails to Disclosers

The **Send Reminder Emails**... tab lists all the disclosers in the units that you administer who have yet to submit their Annual Disclosure for the fiscal year. Use this tab to email (as often as you deem necessary) those disclosers.

**Home Workspace > Send Reminder Emails... tab**

1. Click the **Send Reminders Email**... tab.
2. Uncheck the checkbox for 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).
Review Recently Added Departments

On the **My Departments** tab, the **All Departments** list displays the departments for which you are currently assigned as a Department Administrator.

When you are entered as a Department Administrator to a new department, it appears in your **Departments In Need of Review** list on the **My Departments** tab. Complete the following steps to verify the role assignments and other information are correct and remove the department from the review list.

### Home Workspace > My Departments tab

1. Click **Edit** in the Manage Dept column for the applicable department.

### Manage Department Information Window

2. Review the individuals assigned to each role and update, as necessary. (See the **Manage Department Information** section for instructions).

3. Uncheck the “in need of review” checkbox.

4. Click **OK**.

The department is removed from the **Departments In Need of Review** list.