

Scribe for COI Proxy Workflow



When you log into myUABResearch, you will see your spouse's profile in your dashboard.

Preview

THE UNIVERSITY OF ALABAMA AT BIRMINGHAM

Dashboard

Agreements

COI

Grants

Page for 1

Create

Recently Viewed

Recent

Pinned

My Inbox

My Reviews

My Inbox

Filter by ID

Enter text to search

+

Add Filter

✕

Clear All

ID	Name	Date Created	Date Modified	State	Coordinator
DP00000079	Disclose Profile for	11/17/2025 10:25 AM	1/5/2026 12:36 PM	Action Required	

1 items

page 1 of 1

25 / page

50°F

Mostly cloudy

Search

12:37 PM

1/5/2026

2 Click "Disclosure Profile for (Spouse's Name)"

The screenshot shows the UAB web portal interface. The top navigation bar includes 'Dashboard', 'Agreements', 'COI', and 'Grants'. The 'My Inbox' section is active, displaying a table with one item: 'Disclosure Profile for'. The 'ID' column shows 'DP00000079'. The 'Name' column shows 'Disclosure Profile for'. The 'Date Created' is '11/17/2025 10:25 AM'. The 'Date Modified' is '1/5/2026 12:36 PM'. The 'State' is 'Action Required'. The 'Coordinator' is blank. The 'Filter by' dropdown is set to 'ID'. The 'Enter text to search' field is empty. The 'Add Filter' button is visible. The 'Clear All' button is also visible. The 'Page' dropdown is set to '1' of '1'.

3 You should see your spouse's profile. Note you are listed as the proxy. Click Edit Disclosure Profile.

The screenshot shows the 'Disclosure Profile for' page. The top navigation bar includes 'Dashboard', 'Agreements', 'COI', and 'Grants'. The 'COI' section is active, displaying 'Disclosures', 'Requests', 'Certifications', 'Plans', 'Triggering Events', 'Reports', 'Meetings', and 'Help Center'. The 'Disclosure Profile for' page shows an 'Action Required' status. The 'Action Required' section includes the text: 'Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the **Complete Disclosure Profile Update** button.' The 'Reason' section includes the text: 'The disclosure profile is new and never been completed.' The 'Edit Disclosure Profile' button is highlighted with an orange circle. The 'Disclosures' section shows a table with columns: 'Management Plan', 'Status', and 'Last Accepted Date'. The 'Status' column shows 'Not Accepted, Satisfied'. The 'Disclosures' section also includes a message: 'You have not disclosed any interests. Reference the Instruction Center to take the appropriate steps of completing a disclosure update.'

4

You will then navigate through the disclosure profile pages. As a proxy, you only need to complete the 2nd page with entity disclosure information.

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Hello, [User Name]

Editing: DP00000079

Instructions and Policies

These are the default instructions and policies provided by the solution.

External Training:

Course Name	Date Completed	Date Expired
LL Financial Conflict of Interest	8/9/2023	8/9/2027
LL Financial Conflict of Interest in Research - 4th Yr Refresher	7/22/2020	7/22/2024

Exit Save **Continue**

5

Answering yes to question 1 allows you to add your disclosures to the profile.

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Hello, [User Name]

Editing: DP00000079

Entity Disclosure Information

1. * Do you, your spouse, and/or dependents have any financial interests and/or external activities to report?

☒ Yes ☐ No [Clear](#)

2. Entity disclosures:

[+ Add](#)

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
There are no items to display							

Exit Save **Continue**

6 Click to add the disclosure

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Validate Compare

Instructions and Policies

Entity Disclosure Information

Additional Information

Complete Disclosure Profile

Editing: DP00000079

Entity Disclosure Information

1. * Do you, your spouse, and/or dependents have any financial interests and/or external activities to report? [?](#)
☒ Yes ☐ No [Clear](#)
2. Entity disclosures:

+ Add

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
There are no items to display							

7 You will then navigate through the smartform and complete the required questions.

DP00000079

n/COI/app/portal/smartform/edit?Project=com.webridge.entity.Entity%5B0ID%5BFC3E0AA1C3D111F07C9975F692A26B02%5D%5D&doValidation=False&Mode=sf&WizardPageOID...

Add Disclosure

Entity Disclosure Information

General Information

1. Entity: [?](#)

or
If you cannot find the entity in the above list, enter the details here:
[None]
2. * Relation to discloser: [?](#)
☐ Self
☐ Spouse
☐ Dependent Child
☐ Other Dependent
3. * Disclosure types:

8

Reminder that if you are entering your disclosure information, you would identify yourself as the Spouse since it is not your profile.

Editing: DP00000079

Entity Disclosure Information

1. * Do you, your spouse, and/or dependent child have any financial interest in any entity?

☒ Yes ☐ No [Clear](#)

2. Entity disclosures:

[+ Add](#)

Entity	Foreign Entity?	Publicly Traded
There are no items to display		

3. * Relation to discloser:

☐ Self
☒ Spouse
☐ Dependent Child
☐ Other Dependent

4. * Disclosure types:

Name	Description
☐ Equity	Stock, Stock Options, Dividends or Ownership Interest
☐ Consulting or Other Professional Services	Advisory or scientific advisory board
☐ Editorial Services	Journal services, scientific editor services
☐ Intellectual Property Rights	Patent, Copyright, License, or Royalties paid directly to institution

* Required

9

Indicate the type of disclosure.

Editing: DP00000079

Entity Disclosure Information

1. * Do you, your spouse, and/or dependent child have any financial interest in any entity?

☒ Yes ☐ No [Clear](#)

2. Entity disclosures:

[+ Add](#)

Entity	Foreign Entity?	Publicly Traded
There are no items to display		

3. * Relation to discloser:

☐ Self
☒ Spouse
☐ Dependent Child
☐ Other Dependent

4. * Disclosure types:

Name	Description
☐ Equity	Stock, Stock Options, Dividends or Ownership Interest
☒ Consulting or Other Professional Services	Advisory or scientific advisory board
☐ Editorial Services	Journal services, scientific editor services
☐ Intellectual Property Rights	Patent, Copyright, License, or Royalties paid directly to institution
☐ Divestiture and Cash Pay-out	Sale of equity
☐ Sponsored Travel	Travel which is paid on behalf of the Investigator
☐ Board Service	Board of Directors, Board of Trustees
☐ Outside Employment	Employment external to your institution
☐ Other Appointments	Compensated or Uncompensated (e.g. positions, appointments, etc.)
☐ Speaking, Prizes and Honoraria	Compensation for speaking, lecturing, presenting, performing, etc.
☐ In Kind Support	Any resource or financial support received that is available to the institution

10 You will then answer the required questions.

The screenshot shows the 'Entity Disclosure Information' form in an editing state. The left sidebar indicates the form is for 'DP00000079'. The main form area is titled 'Consulting and Other Professional Services' and contains a section for 'Advisory or scientific advisory board'. The form includes several questions: 1. 'Do you, your spouse, and/or dependent have any financial interest in the entity?' with radio buttons for 'Yes' and 'No'. 2. 'Entity disclosures:' with a table to add disclosures. 3. 'Compensation in the past 12 months:' with a text input field. 4. 'Approximate time (days) you spent on this activity in the past 12 months:' with a text input field. 5. 'Are you required to perform research as part of this activity?' with radio buttons for 'Yes' and 'No'. 6. 'Additional information that would help clarify this disclosure:' with a large text area. The form also includes a 'Related Documents' section at the bottom.

11 Once you have answered the questions, you will click ok or ok and add another if you have additional interests to add to the disclosure.

The screenshot shows the 'Entity Disclosure Information' form with completed answers. The 'Compensation in the past 12 months' field is filled with '1000000'. The 'Approximate time (days) you spent on this activity in the past 12 months' field is filled with '12'. The 'Are you required to perform research as part of this activity?' question has 'No' selected. The 'Additional information that would help clarify this disclosure' field contains the text 'consulting on drug xyz'. The 'Related Documents' section is empty. The 'OK' button is highlighted with an orange circle, indicating the next step in the process. The form also includes a 'Related Documents' section at the bottom.

12 Once you have completed the disclosure, click continue.

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Editing: DP00000079

Entity Disclosure Information

1. * Do you, your spouse, and/or dependents have any financial interests and/or external activities to report? [Clear](#)

☒ Yes ☐ No

2. Entity disclosures:

[+ Add](#)

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
Update AASTROM BIOSCIENCES INC	No		Spouse	Consulting or Other Professional Services	\$1,000,000.00	12	1/5/2026

[Exit](#) [Save](#) [Continue](#)

13 You do not need to answer the remaining questions. The discloser should answer these. You can now click Save and then Exit.

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Editing: DP00000079

Additional Information

1. * Are you an applicant or a participant party to a foreign talent recruitment program? [Clear](#)

☐ Yes ☒ No

2. * Do you have an active startup package from another organization? [Clear](#)

☐ Yes ☒ No

3. * Do you have a startup company based on intellectual property licensed from any other entity besides this institution? [Clear](#)

☐ Yes ☒ No

[Exit](#) [Save](#) [Continue](#)

14

You should now click Complete Proxy Update. This allows the spouse to know you have updated their disclosure with the necessary information.

Preview UAB THE UNIVERSITY OF ALABAMA AT BIRMINGHAM.

Dashboard Agreements COI Grants Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Disclosures > Disclosure Profile for [redacted]

Action Required

- ☒ Complete Proxy Update
- Assign Proxy
- Remove Proxy

Disclosure Profile for [redacted]

Instruction Center

Action Required
Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the **Complete Disclosure Profile Update** button.

Reason
The disclosure has never been completed.

[Edit Disclosure Profile](#)

Discloser proxy: [redacted]

Management Plan	Status	Last Accepted
	Not Accepted, Satisfied	

Disclosures Training History

15

You can provide comments or documents if needed. This will be included in the notification to your spouse letting them know you have updated their profile. Then click ok.

1. Comments:

[Text area for comments]

2. Supporting documents:

[+ Add](#)

Name

There are no items to display

[OK](#) [Cancel](#)

16 Your spouse's profile has now been updated and they have been notified.

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Dashboard Agreements COI Grants Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Disclosures > Disclosure Profile for [redacted]

Action Required
Proxy update last completed: 1/5/2026

- Complete Proxy update
- Assign Proxy
- Remove Proxy

Instruction Center

Action Required	Reason
Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the Complete Disclosure Profile Update button.	The disclosure profile is new and has never been completed

[Edit Disclosure Profile](#)

Discloser proxy: [redacted]

Management Plan	Status	Last Accepted Date	Plan Monitors
	Not Accepted, Satisfied		Paul Atchison

Disclosures Training History

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
View AASTROM BIOSCIENCES INC.	No		Spouse	Consulting or Other Professional Services	\$1,000,000.00	12	1/5/2026