

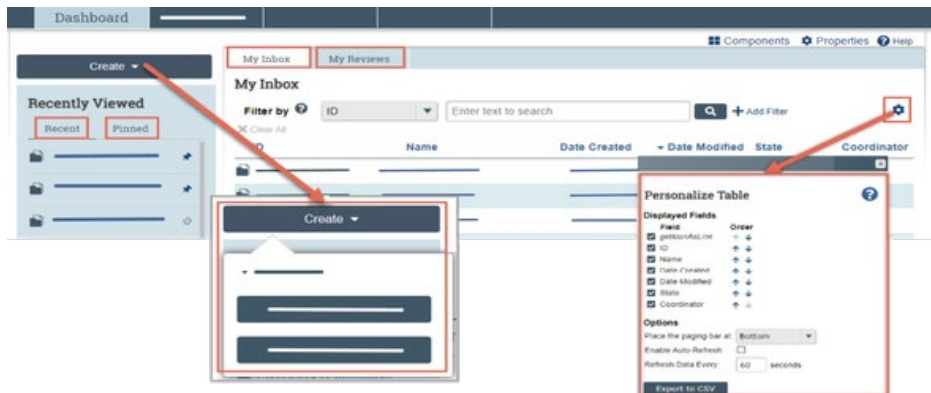
COI Reviewer - Navigation and Basic Tasks

When you first log in, you will be on your Dashboard, which is the starting point for finding items and performing many basic tasks.

To find key items

From your Dashboard, you will see:

- **My Inbox:** Items that require you to take action.
- **My Reviews:** Items assigned to you to review if you are a reviewer. These are a subset of the items in My Inbox.
- **Recently Viewed:**
 - **Recent:** The last several items you viewed. Scroll through this list to find an item you worked on recently.
 - **Pinned:** You can pin the items in the Recently Viewed section for quick and easy access. This is where those pinned items are listed.
- **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.



To identify what action is needed

- Review the state of the certification or management plan in My Inbox. The state gives a clue as to what to do next. For example, Committee Review means a certification is scheduled or in-review by a COI committee.

To open a certification

- From My Inbox, or from the Certifications page, click the certification name. The certification workspace opens.

To open a management plan

- From My Inbox, or from the Plans page (Management Plan tab), click the management plan name.
The management plan workspace opens.

To open a retrospective review

- From My Inbox, or from the Plans page (Mitigation Plan tab), click the retrospective review name.
The retrospective review workspace opens.

To open a triggering event

- From My Inbox, or from the Triggering Events page, click the triggering event name.
The triggering event workspace opens.

To open a pre-approval request

- From My Inbox, or from the Requests page, click the pre-approval request name.
The pre-approval request workspace opens.

To view history

- From the certification workspace, click the **History** tab.

Review Complete

CERT00000040: Research certification for Rebecca Simms (pi)-357902

Certification created date: 1/14/2022 9:15 PM
Determination date: 1/14/2022
Profile last submitted date: 1/14/2022
Training expiration date: 1/15/2022

Certification type: Research
Determination: Requires Management Plan
Assigned management plan: Rebecca Simms Plan
Assigned reviewer: Astrye Kim (pi-35)

Reviewer: Rebecca Simms (pi)
Reviewer's employer: Radiology
Has significant financial interest: No
Research project: 107402
Research project name: Retrospective Study

Next Steps

- View Certification
- Return for Review
- Attach Reviews
- Manage Ancillary Reviews
- Reset Review Stages
- Add Comment

History | Review Submissions | Management Plans | Suspended

Filter by: Activity | Enter text to search

Activity | Author | Activity Date

Review Submitted	Rebecca Simms	1/14/2022 10:00 PM
Returned for Review	Rebecca Simms	1/14/2022 10:00 PM
Review Submitted	Rebecca Simms	1/14/2022 9:38 PM
Returned for Review	Rebecca Simms	1/14/2022 9:38 PM
Review Submitted	Rebecca Simms	1/14/2022 9:38 PM
Immediate Review Completed	Astrye Kim	1/14/2022 9:34 PM
Immediate Review Completed	Astrye Kim	1/14/2022 9:38 PM
Profile Updated	Rebecca Simms	1/14/2022 9:21 PM

The **History** tab lists the activities performed on a certification including any comments, attachments added, or profile updates.

To see information about reviews

- From the project (certification or pre-approval request) workspace, click the **Review Information** tab.

Review Complete

Certification created date: 1/14/2020 8:10:54 AM
Submission date: 1/14/2020
Module last submitted date: 1/14/2020
Training expiration date: 1/14/2020

Next Steps

[View Certification](#)

Review Stages

Order	Review Type	Name	Reviewing	Default Reviewer
1-01	Department	Department Review	Passing	Department Review
2-01	Foreign Interest	Foreign Interest Review	Passing	Foreign Interest Review
3-01	Central Compliance	Central Compliance Office	University Compliance	University Compliance

Reviews: Latest Intermediate

Order	Stage Name	Reviewing	Reviewer	Comments	Supporting Documents	Action Needed	Completed Date
1-01	Department Review	Passing	Department Review	0 items in the list. Error 6: Attachment not found that is listed in storage.		No	1/14/2020
2-01	Foreign Interest Review	Passing	Foreign Interest Review	0 items in the list.		No	1/14/2020

Reviews: Final

Order	Stage Name	Reviewing	Reviewer	Comments	Supporting Documents	Action Needed	Completed Date
1-01	Department Review	Passing	Department Review	0 items in the list. Error 6: Attachment not found that is listed in storage.		No	1/14/2020
2-01	Foreign Interest Review	Passing	Foreign Interest Review	0 items in the list.		No	1/14/2020

Previous Final Reviews

Order	Stage Name	Reviewing	Reviewer	Comments	Supporting Documents	Action Needed	Completed Date
1-01	Department Review	Passing	Department Review	0 items in the list. Error 6: Attachment not found that is listed in storage.		No	1/14/2020
2-01	Foreign Interest Review	Passing	Foreign Interest Review	0 items in the list.		No	1/14/2020

The **Review Information** tab summarizes the important information you need to know about the review of this project.

- The **Review Information** tab has the following sections:
- **Review Stages** section contains information on the order of review stages and their default reviewer, as well as name and type of the review.
 - **Reviews: Latest Intermediate** section contains review information provided by the assigned reviewer in each intermediate review step. This information is provided in the Submit My Review activity.

Note: If an intermediate review step is completed more than once, the previous review information can be accessed through the History tab.

- **Reviews: Final** section appears after the final review is completed. It contains review determination data from the most recent final review that was performed.

- **Previous final reviews** section appears only if a final review was performed multiple times (i.e. a certification had all stages of review completed and then it was re-opened for another review).

Filter and Sort Data

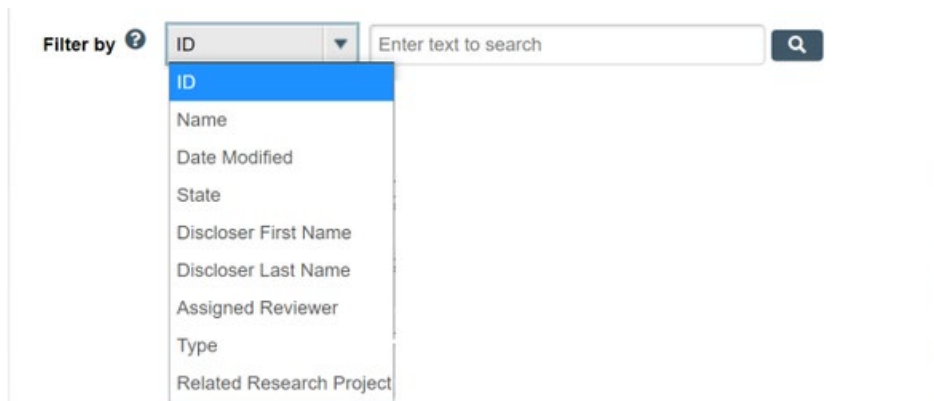
Many pages contain tables you can filter and sort to help you find the required data.

- Filtering reduces the list to only the data that meets the criteria. The advanced filter lets you combine multiple filter criteria together.
- Sorting displays the data in ascending or descending order by a particular column.

To filter data

1. Select the column to filter by from the drop-down menu. The menu lists only the columns you can filter by.

Note: To combine multiple filter criteria, such as, ID, Name, and Date Created.



2. In the text box, type the beginning characters for the items you want to find. If you do not know the beginning characters, type a % symbol as a wildcard before the characters.

Examples:

- 71 shows all items beginning with 71
- %71 shows all items containing 71 in any position



Tip: For examples and a list of operators you can use, click the Help icon.



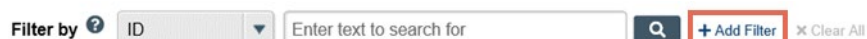
3. Click the magnifying glass icon to apply the filter.

The table shows only those rows that are an exact match.

Tip: If you do not see the expected items in the list, click **Clear All** in the Filter By area to remove the filter.

To use advanced filters

1. In the Filter by area, click **Add Filter**.



2. Enter filter criteria as explained in the previous section.

3. To add more criteria, click **Add Filter** once more.

4. Click the magnifying glass to apply the filter.

The table shows only those rows that match all the filter criteria.

To sort data

1. Click the column header you want to sort by.

2. Click it a second time to reverse the sort order.

The arrow indicates the column by which the data is sorted and the sort order, either ascending (up arrow) or descending (down arrow).

Note: If the column header is not a link, you cannot sort by that column.

