

This guide walks you through how to update your disclosure profile to submit a disclosure. Some reasons you may need to update your disclosure profile include: you are added to a new research project, your COI discloser training has expired, or an annual update is needed.

1. Start on your Disclosure Profile workspace by clicking on the COI tab.

Dashboard

Agreements

COI

Grants

Disclosures

Requests

Certifications

Plans

Triggering Events

Reports

Meetings

Help Center

COI > Disclosures > Disclosure Profile for Rebecca Simms (pi)

No Action Required

Disclosure profile last completed: 8/14/2025
Date write-in entities managed: 1/29/2025

Request Pre-Approval

Disclosure Profile for Rebecca Simms (pi)

Instruction Center

Action Required

No actions need to be taken at this time

Reason

Discloser's disclosure profile is up-to-date and requires no action

Edit Disclosure Profile

Management Plan

Status

Last Accepted Date

Pending

Disclosures

Pre-Approval Requests

Training

History

Entity

Foreign Entity?

Publicly Traded?

Relation to Discloser

Disclosure Types

View

10X GENOMICS

No

Self

Equity

2. Click Edit Disclosure Profile to add a disclosure to access the disclosure profile smartform.

Edit Disclosure Profile

3. Complete the disclosure profile smartform, filling out each page of the form to ensure that all disclosures are entered. Click Add to add any entity disclosures (details on next slide), click Continue to move to the next page.

Validate

Compare

Instructions and Policies

Entity Disclosure Information

Additional Information

Complete Disclosure Profile

Editing: DP00000033

Go to forms menu

Print

Help

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
10X GENOMICS	No		Self	Equity	\$0.00	0	8/14/2025

Update

3. Approved requests:

Request	Request Type	Entity	Foreign Entity?	Start Date	End Date	Approval Date	Review Group	Applied to Disclosures
Pre Approval Request Training Test	Outside Academic Appointment	10X GENOMICS	No	8/15/2025	8/25/2025	8/14/2025		Mark Complete
Teach a Class	Other Appointment	Acad Engagement & Global Citizenship	No	9/1/2025	5/31/2026	2/26/2025		Mark Complete

Requests marked as completed will be removed from this listing when a profile update is completed.

Exit

Save

Continue

4. After clicking Add, the Add Disclosure slide in window will appear. Complete the questions on each page to add your disclosures. Based on the type of disclosure you select, new sections may appear with additional questions. Finish by adding any necessary additional information or related documents, and click OK, or OK and Add Another if you have additional disclosures to add.

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:

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 individual
☐ 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, fellowships, or talent programs)
☐ Speaking, Prizes and Honoraria	Compensation for speaking, lecturing, presenting, performing, or prizes (e.g. Nobel Prize, Honorary Degrees, etc.)
☐ In-Kind Support	Any resource or financial support received that is available to the researcher, including office/lab space, equipment and supplies, and employee or student resources.
☐ Postdoctoral Scholar, Student, or Visiting Scholar	An individual who temporarily visits the institution to engage in research and scholarship
☐ Expert Witness Services	Providing specialized knowledge, skills, or expertise to assist in legal matters.

Equity or Ownership Interest

Stock, Stock Options, Dividends or Ownership Interest

1. * Do you own stock / partnership shares in this organization? ?

☐ Yes ☐ No [Clear](#)

2. * Do you own stock options or any other form of equity in this organization? ?

☐ Yes ☐ No [Clear](#)

3. What percentage of the company interests do you hold? ?

4. Additional information that would help clarify this disclosure:

5. Related documents:

+ Add

There are no items to display

6. Dividend payments received in the past 12 months:

7. Was the equity ownership obtained by providing professional services in the past 12 months?

☐ Yes ☐ No [Clear](#)

Required

OK

OK and Add Another

Cancel

5. The disclosure you have just created is added to the table. Click Continue to move to the next page.

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
Update 23ANDME	Yes		Self	Equity	\$1,000.00	0	7/10/2025 *

* Exit

Save

Continue →

6. This will take you to the Additional Information page. Answer each of the questions. For any question you select “Yes” to, an additional question will appear asking you to provide additional information. Once you complete this form, click Continue to move to the next page.

Instructions and Policies

Entity Disclosure Information

Additional Information

Complete Disclosure Profile

Additional Information

1. * Are you an applicant or a participant party to a foreign talent recruitment program?

☒ Yes ☐ No [Clear](#)

2. * Provide the name and a description of the foreign talent recruitment program: ?

3. * Do you have an active startup package from another organization?

☐ Yes ☒ No [Clear](#)

4. * Do you have a startup company based on intellectual property licensed from any other entity besides this institution?

☒ Yes ☐ No [Clear](#)

5. * Select the entities with which you have a startup company based on non-institutional IP: ?

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
☒ 10X GENOMICS	No		Self	Equity	\$0.00	0	8/14/2025

* Exit

Save

Continue →

7. This will take you to the Complete Disclosure Profile page, on this page, click Validate to make sure everything is filled out correctly. If there are no errors, click Submit. Verify that all the disclosure information is accurate and current and click OK. You have now submitted a disclosure.

Validate

Compare

<<

Instructions and Policies

Entity Disclosure Information

Additional Information

Complete Disclosure Profile

Editing: DP00000033

Go to forms

Complete Disclosure Profile

The following has occurred:

- Discloser manually updated the disclosure profile

Next Steps:

- Click the Submit button below after all necessary updates have been made to the Disclosure Profile.

Submit

Submit

By completing your disclosure profile update you are verifying that all disclosure information is accurate and current.

1. Open research triggers: ?

Research Project	Event Type	Sponsor	Related Context
Update			
Update			
Update			

OK

Cancel