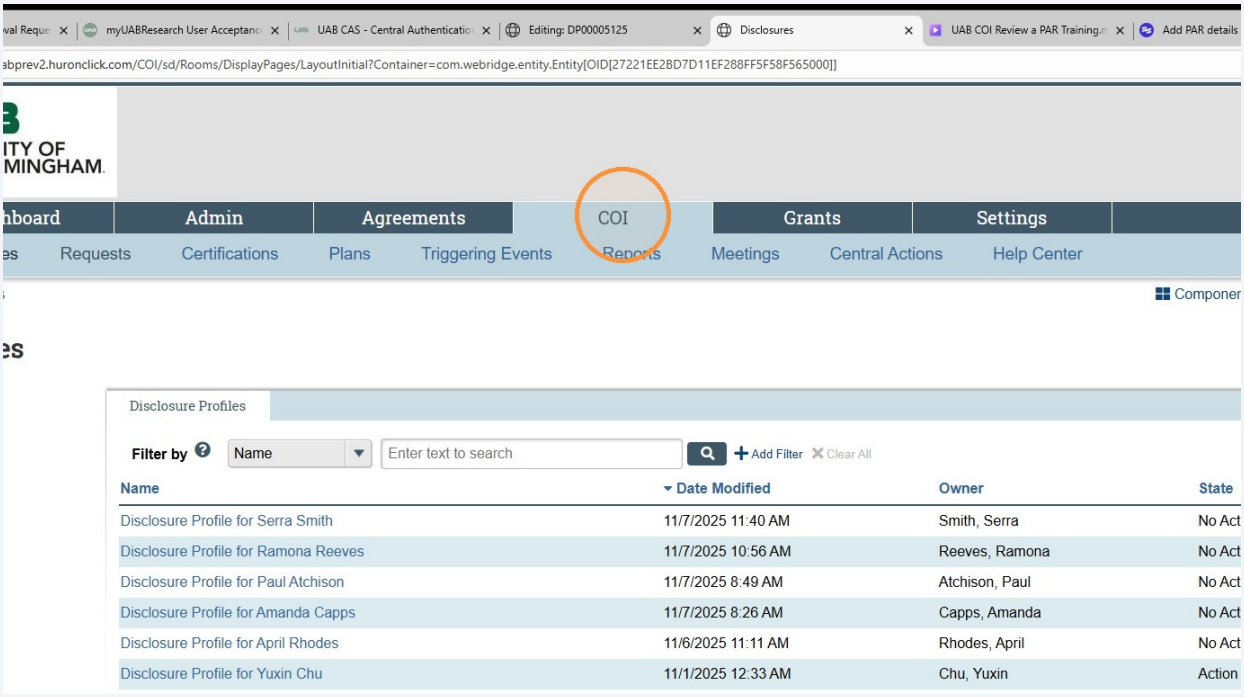
Add PAR Details to Disclosure

1 **After your pre-approval request has been approved, you'll need to enter the financial interest in your Disclosure Profile.**

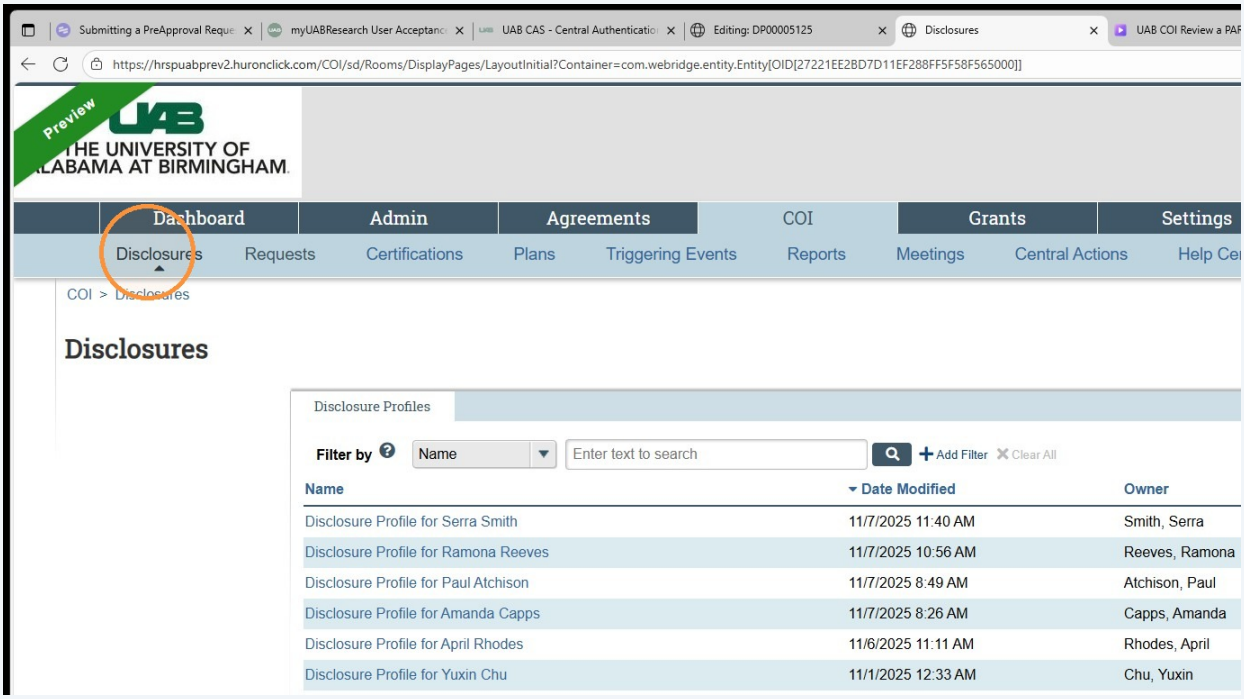
Best Practice: Add the financial interest to your disclosure profile immediately after the PAR is approved; however, the financial interest must be disclosed prior to the work beginning.

NOTE: If the actual financial interest received is different than originally disclosed, please revise your Disclosure Profile as appropriate.

Navigate to COI

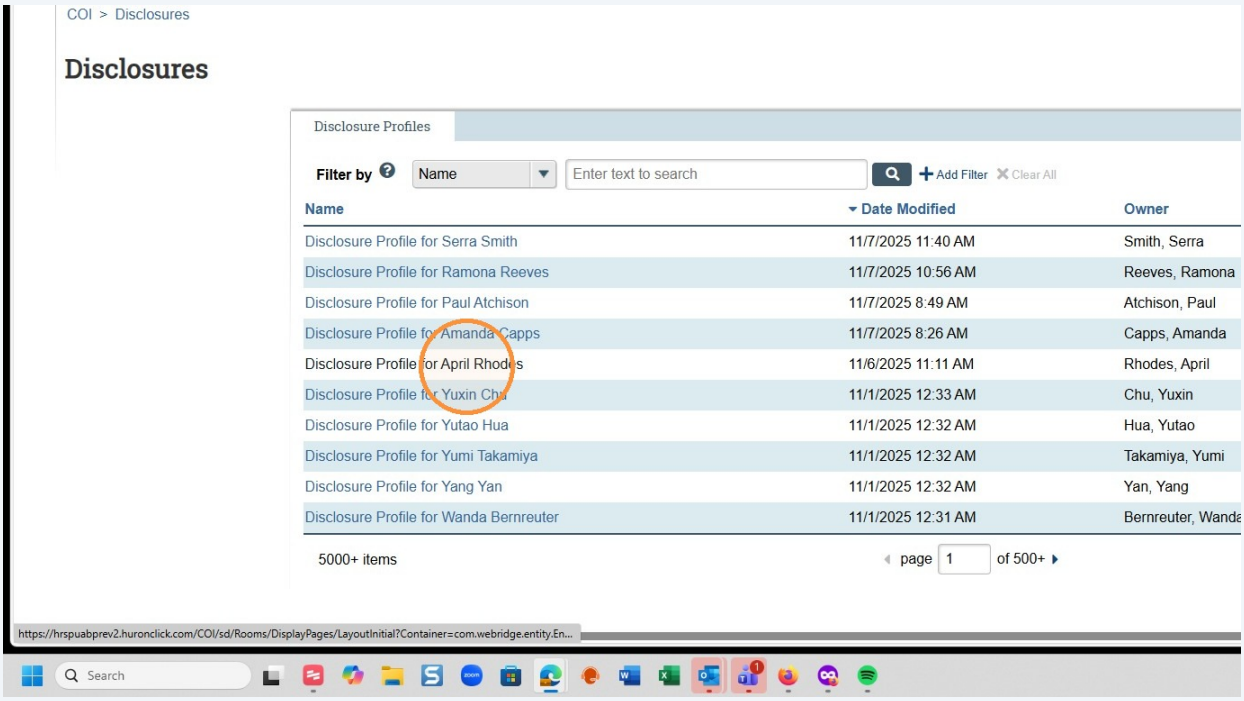


2 Click Disclosures

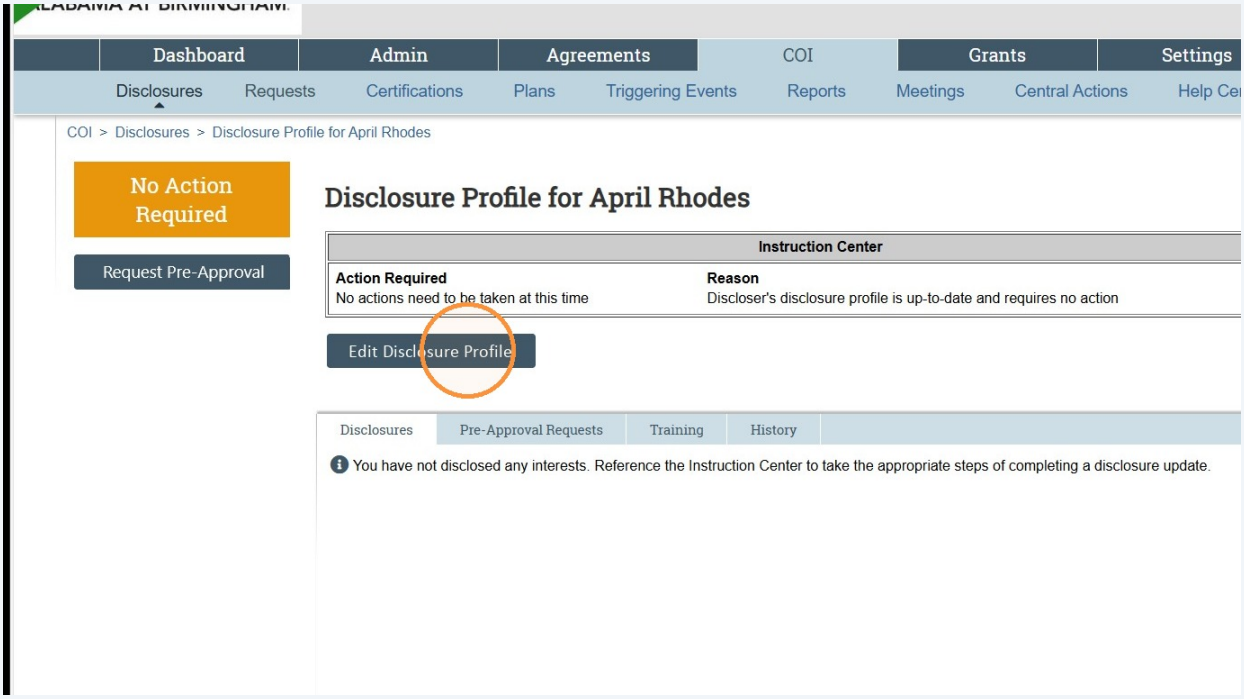


3 Navigate to your Disclosure and click on it to open. Search by name if needed.

NOTE: The % sign acts as a 'wild card' when searching

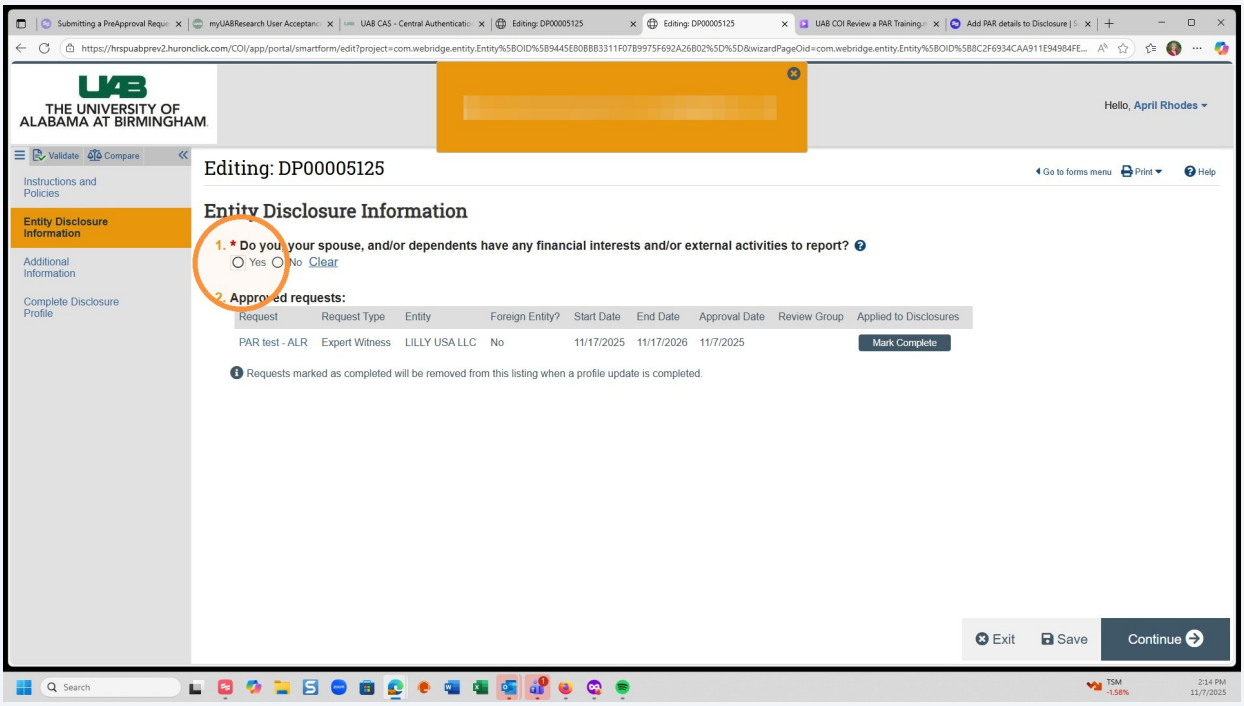


4 Click Edit Disclosure Profile



5 Navigate to the Entity Disclosure page the of the smartform.

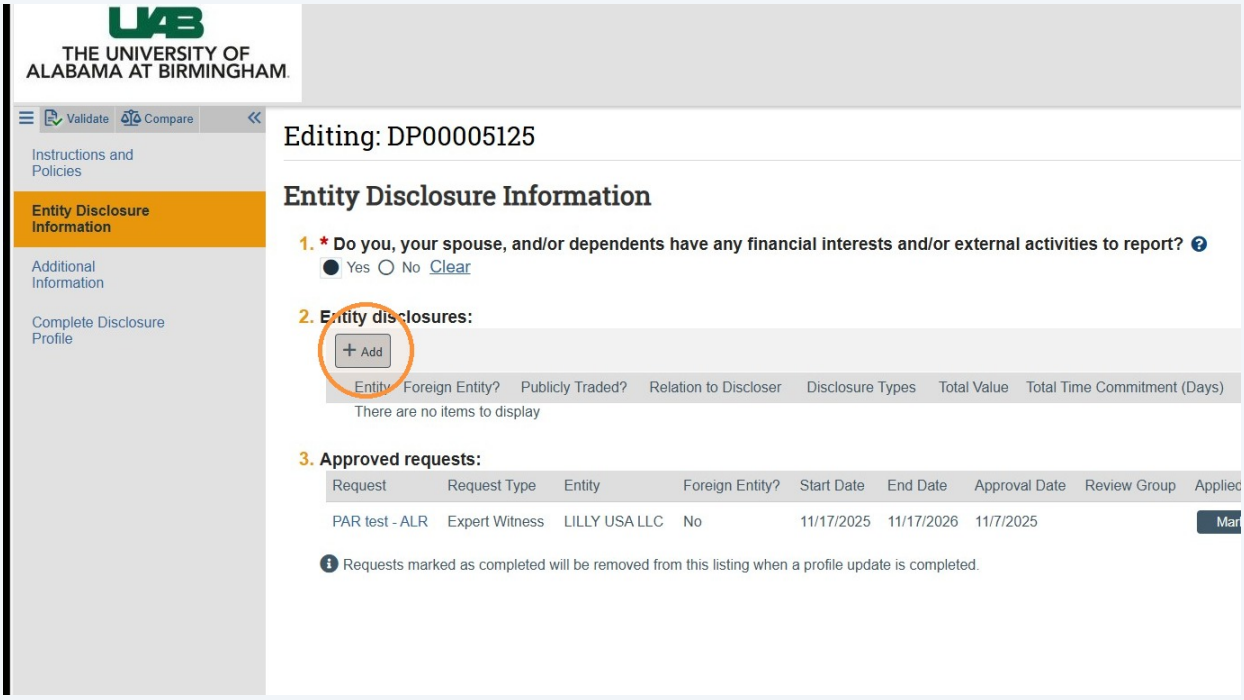
Answer question 1 with Yes



6

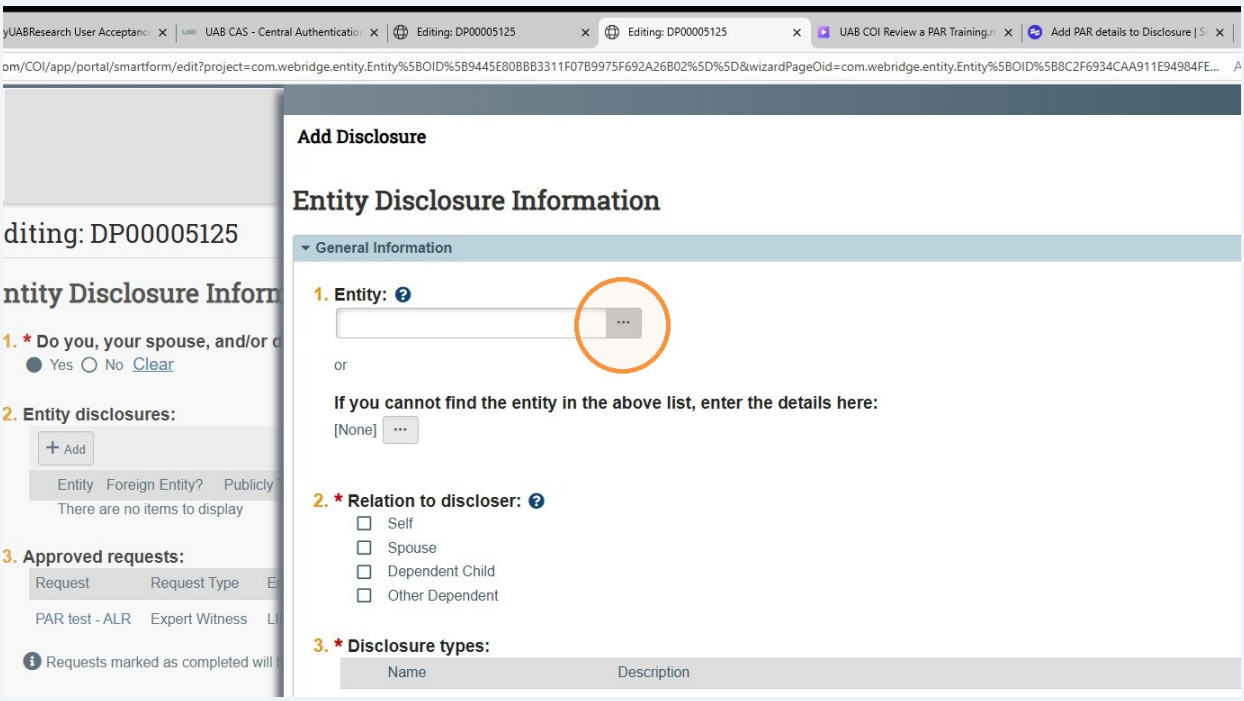
Add the entity from the pre-approval request to your entity disclosures. To do this, click Add, complete the form, then click OK.

• Note: if the entity from your request is already part of your entity disclosures, click Update, instead of Add.

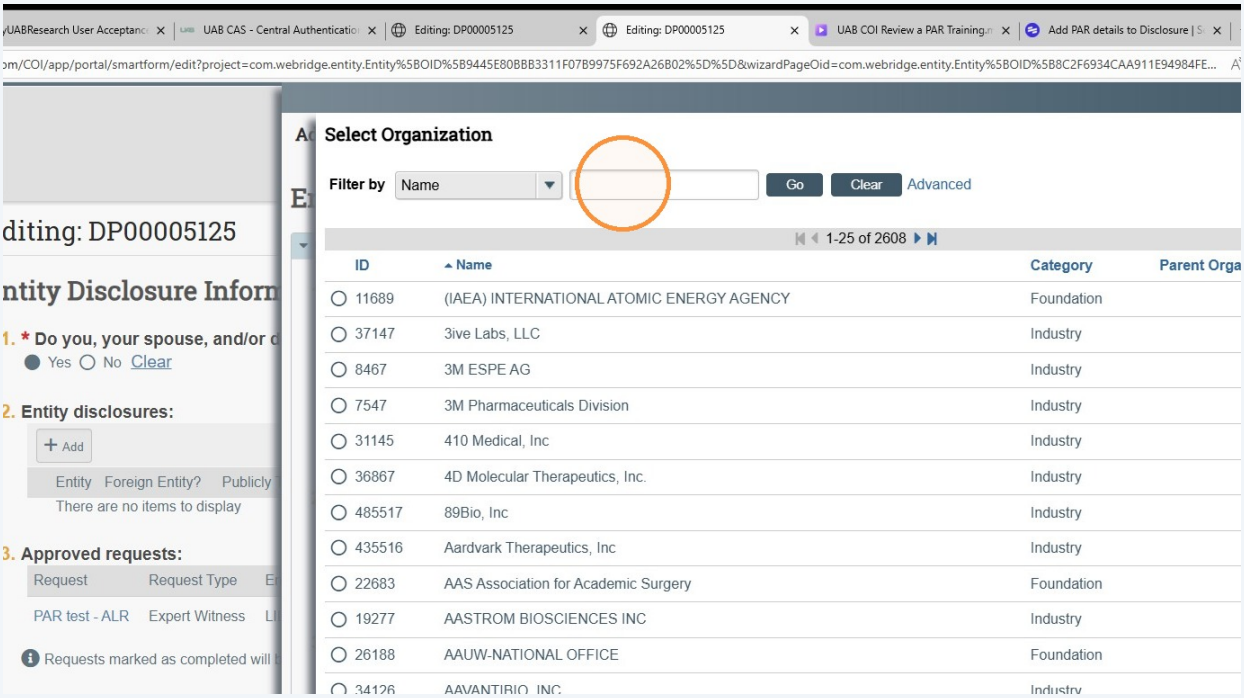


7

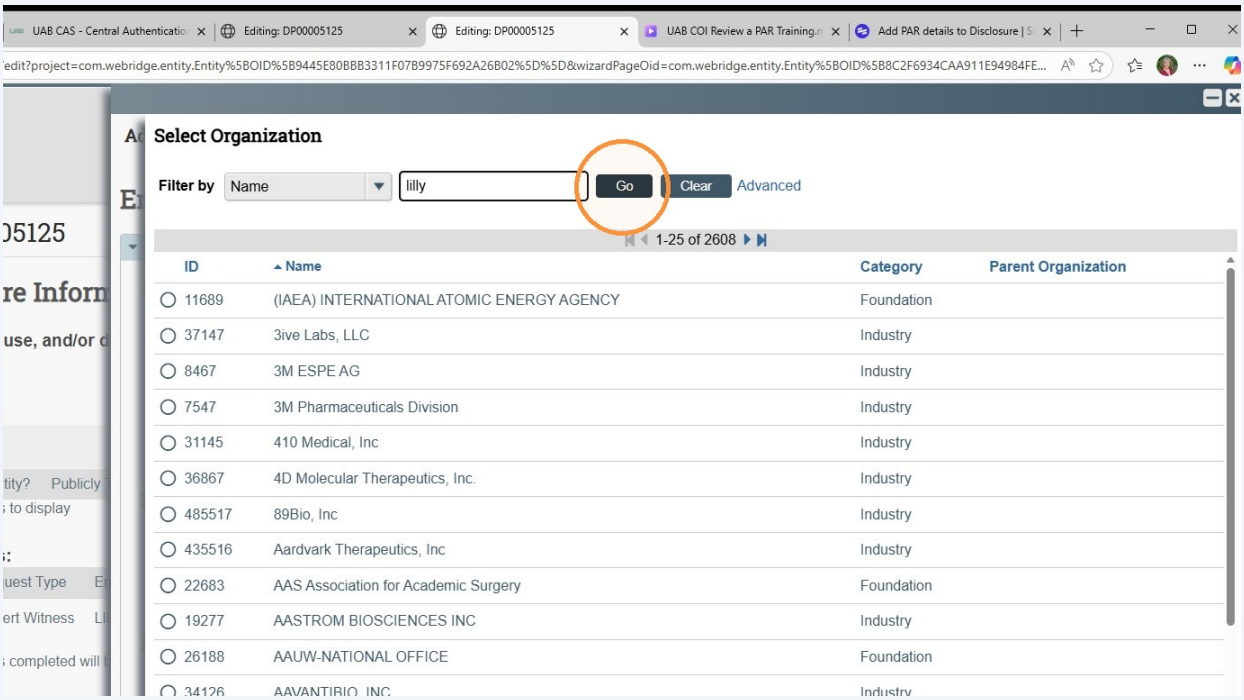
Click the three dots to open the Entity pick list



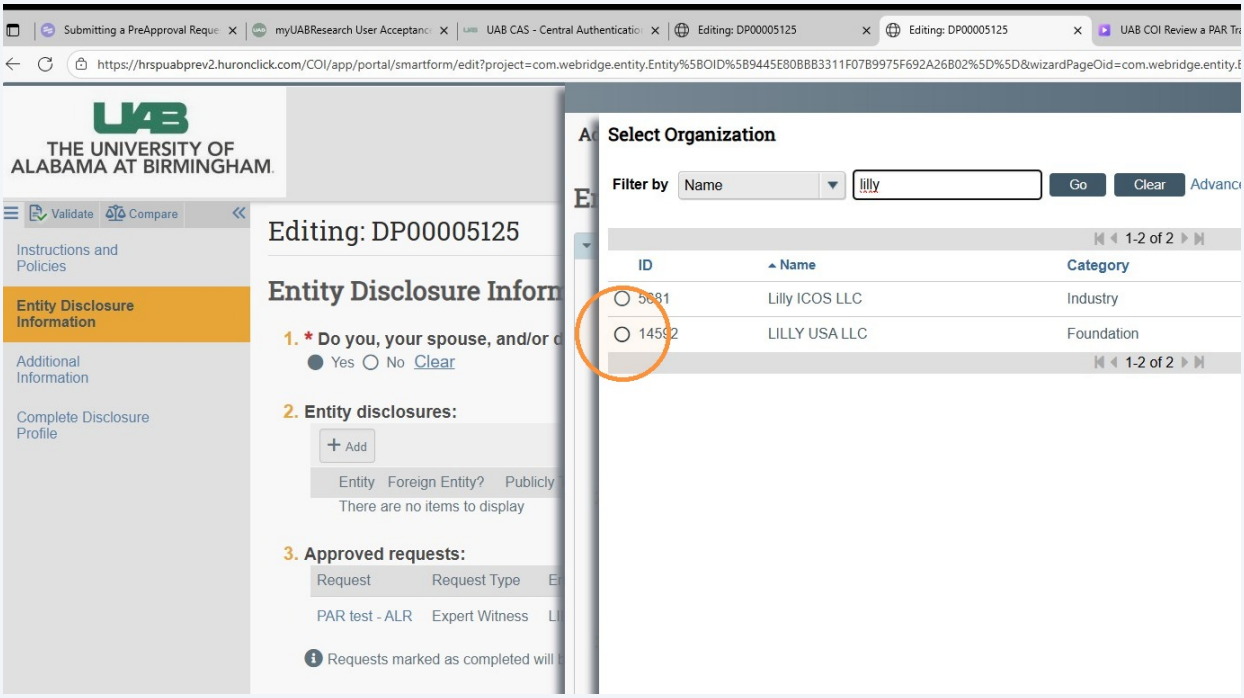
8 Click Search for your entity



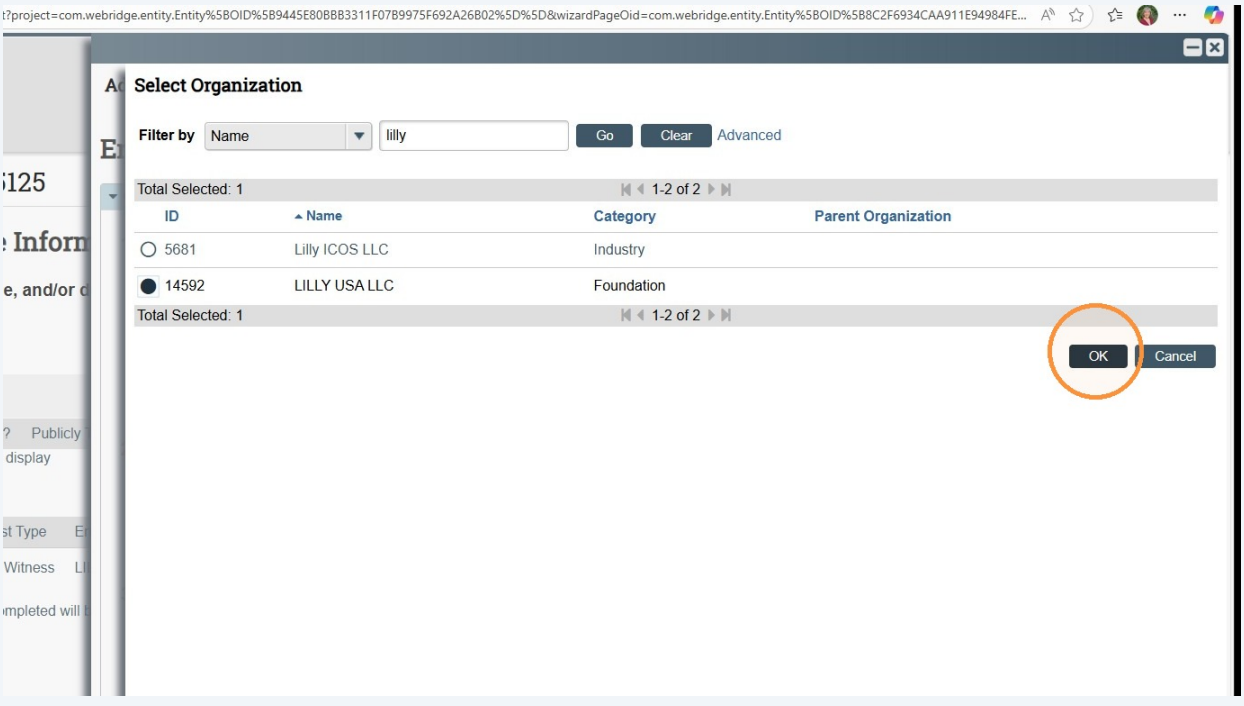
9 Click Go



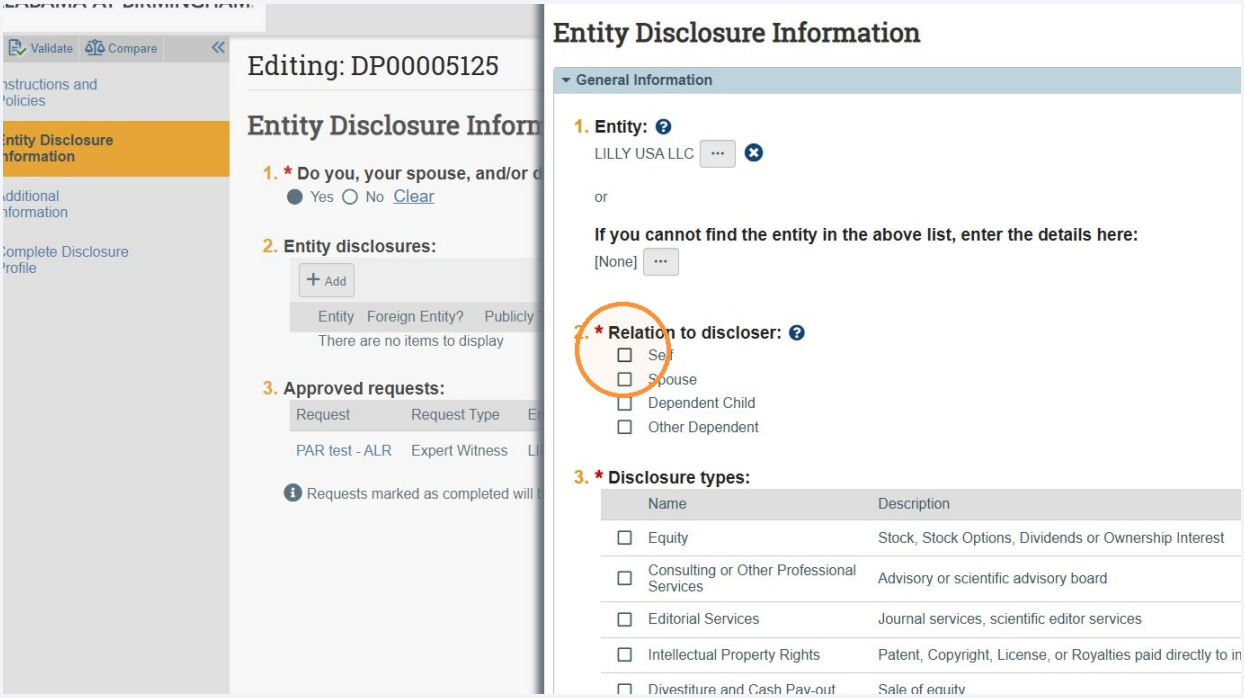
10 Select your entity



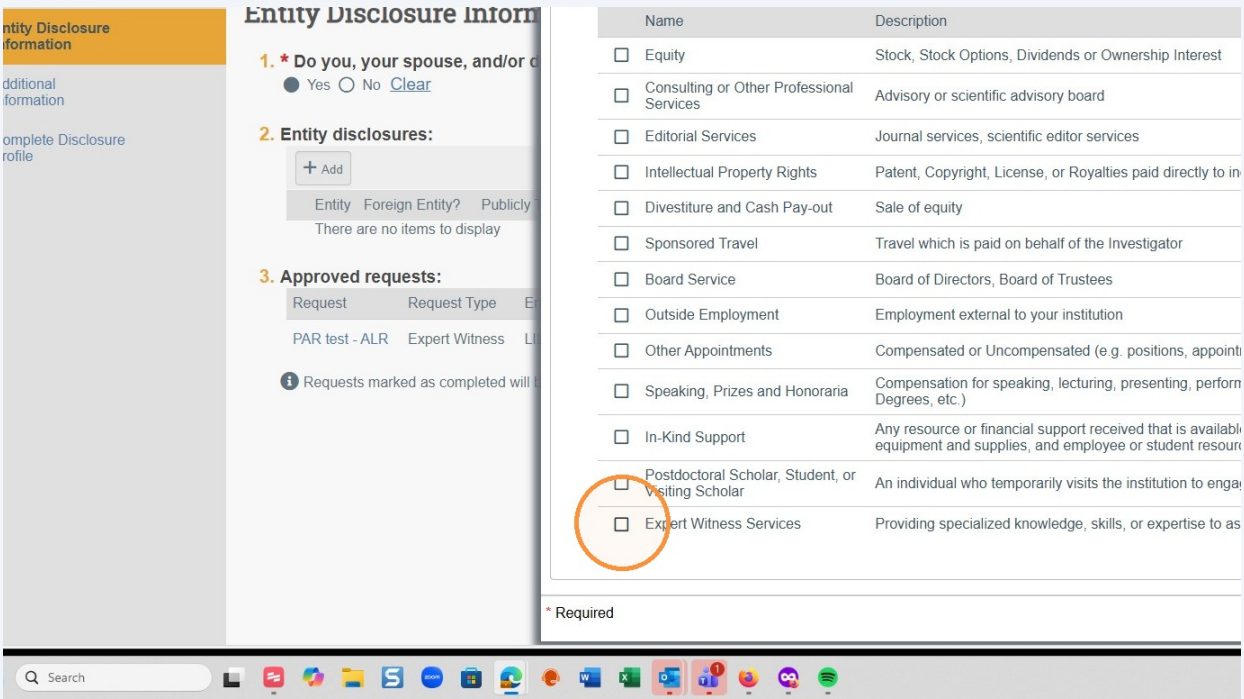
11 Click OK



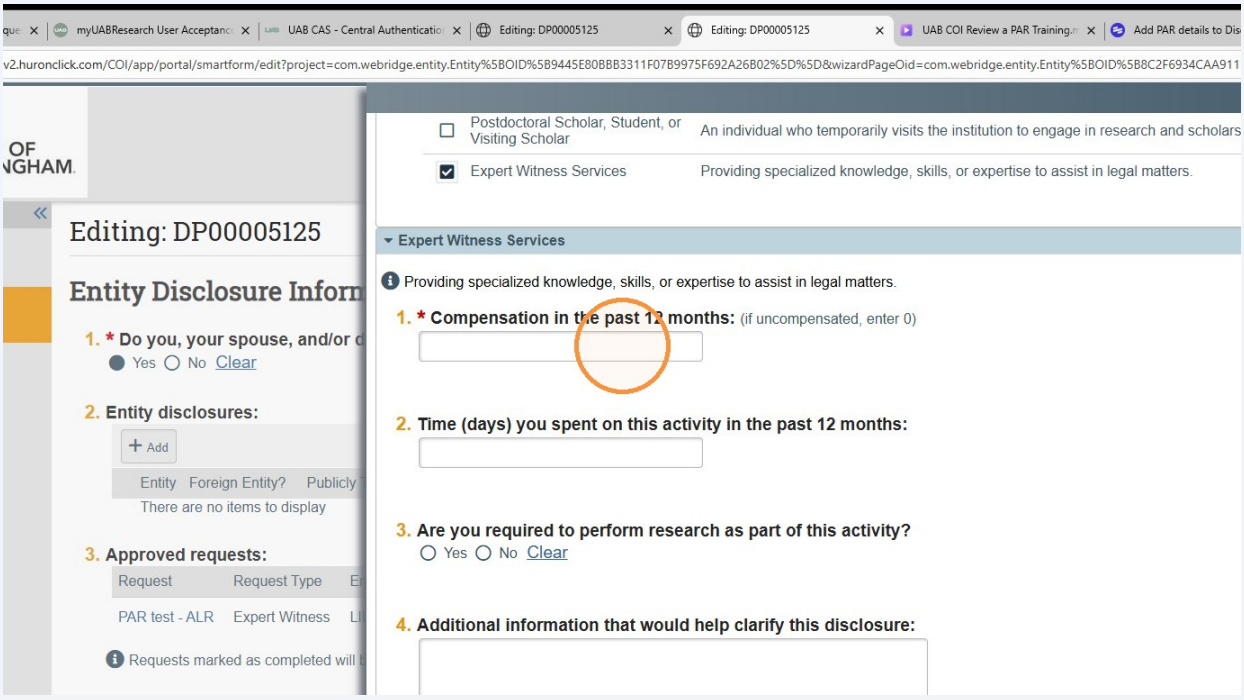
12 Complete remaining information and scroll to required fields (denoted by *)



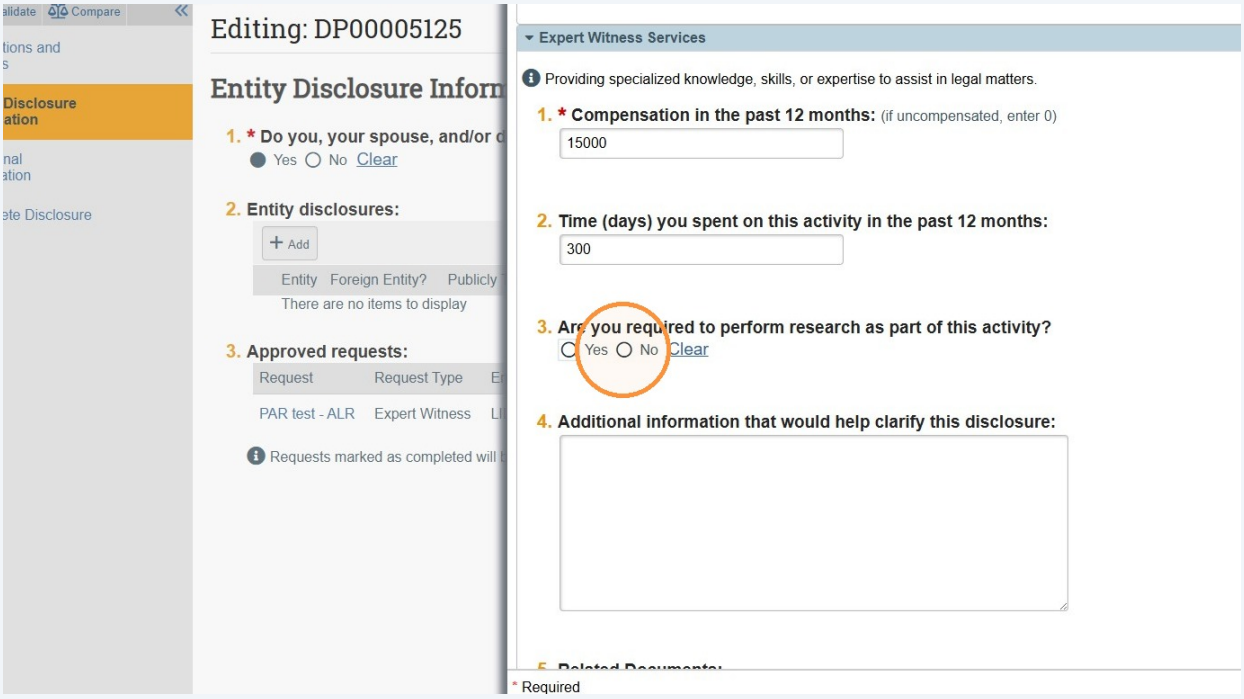
13 Select the Disclosure Type.



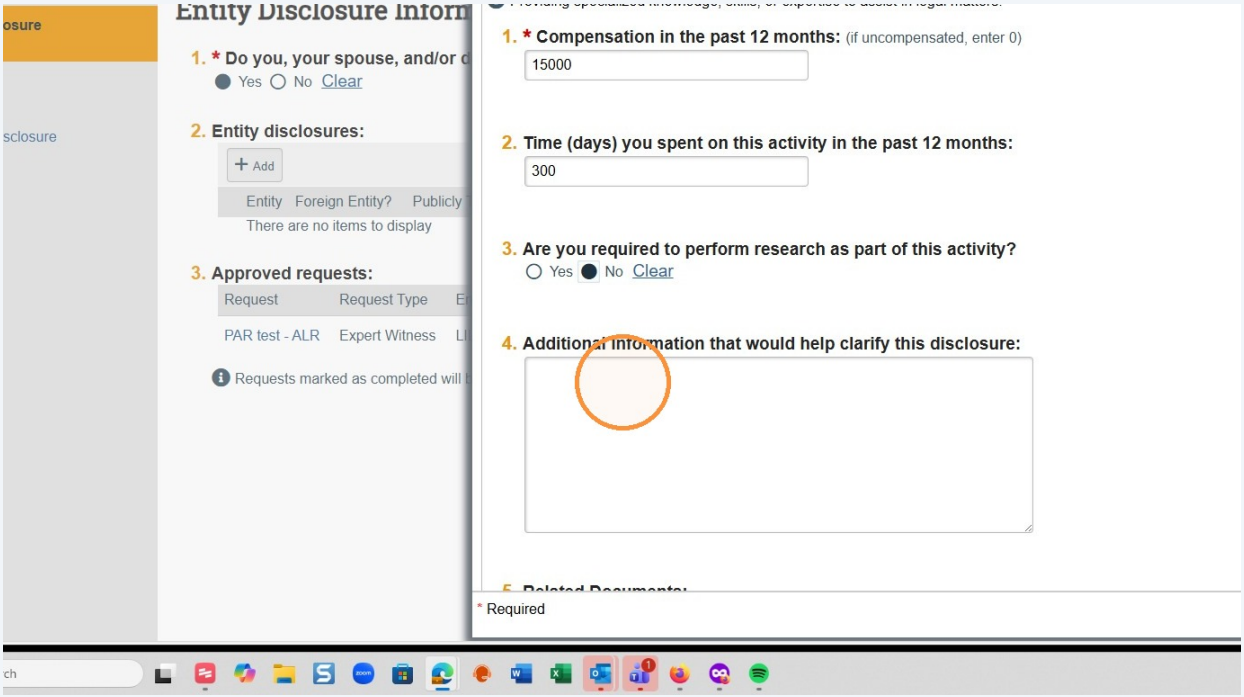
14 Enter the total compensation you anticipate receiving.



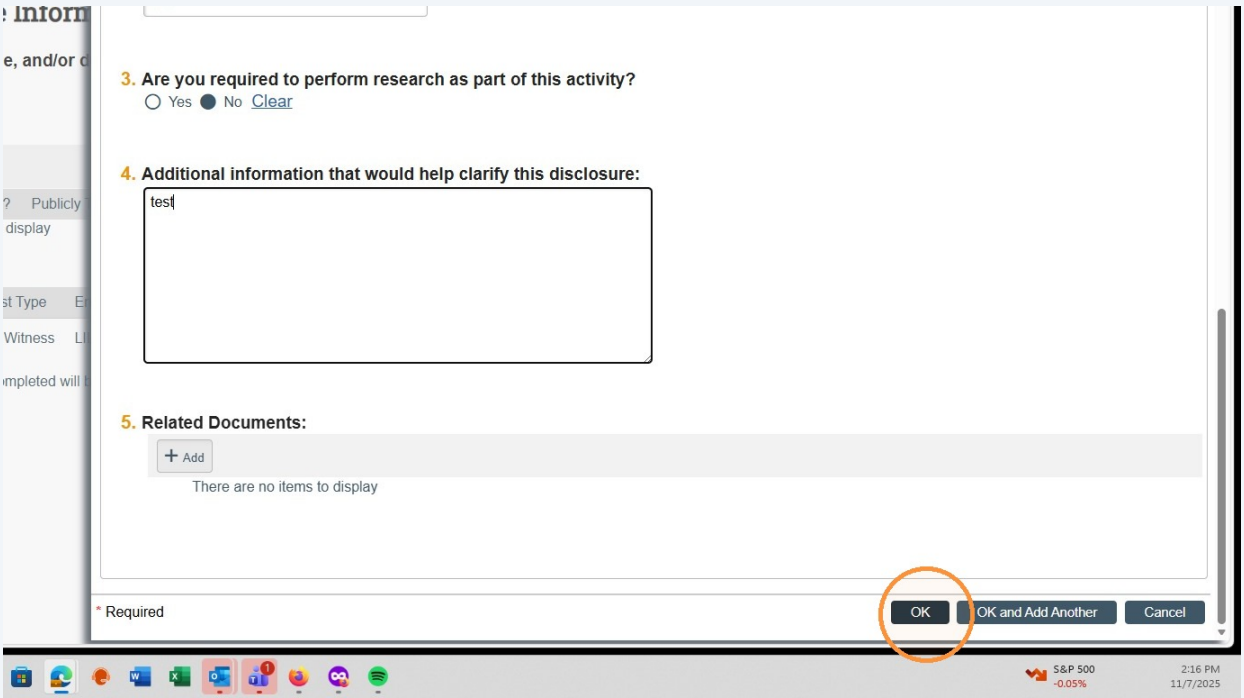
15 Complete Question 3.



16 Complete Question 4.



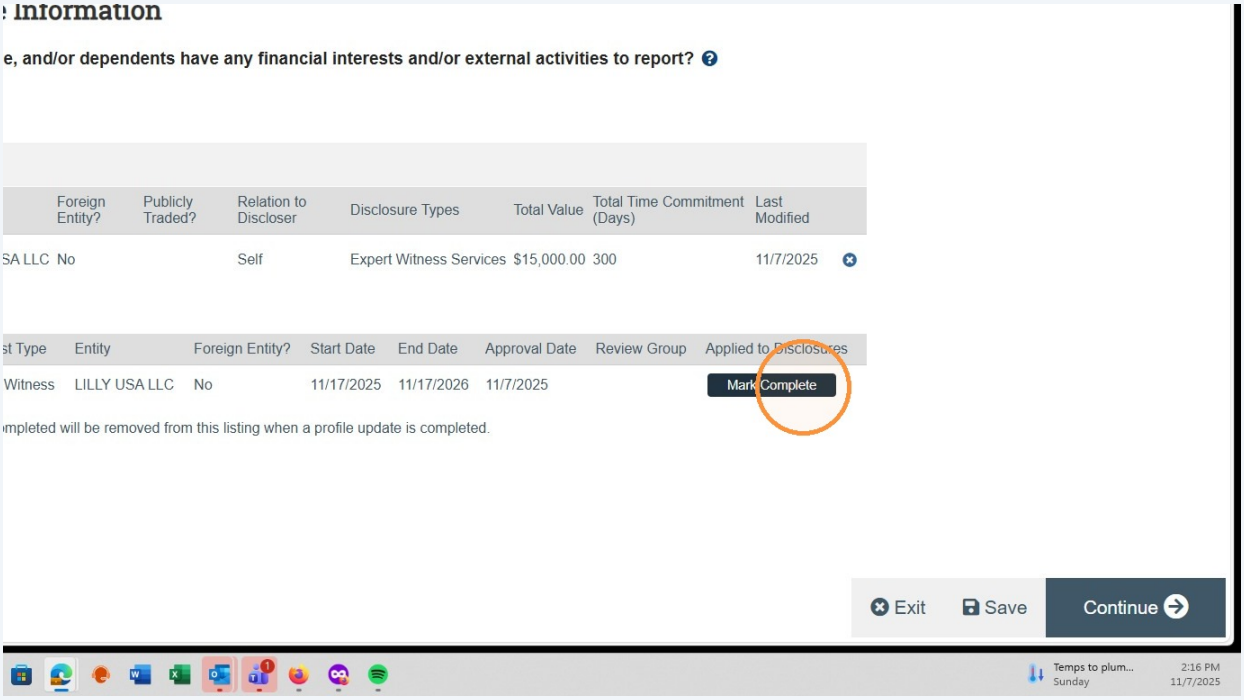
17 When the form is complete, click OK



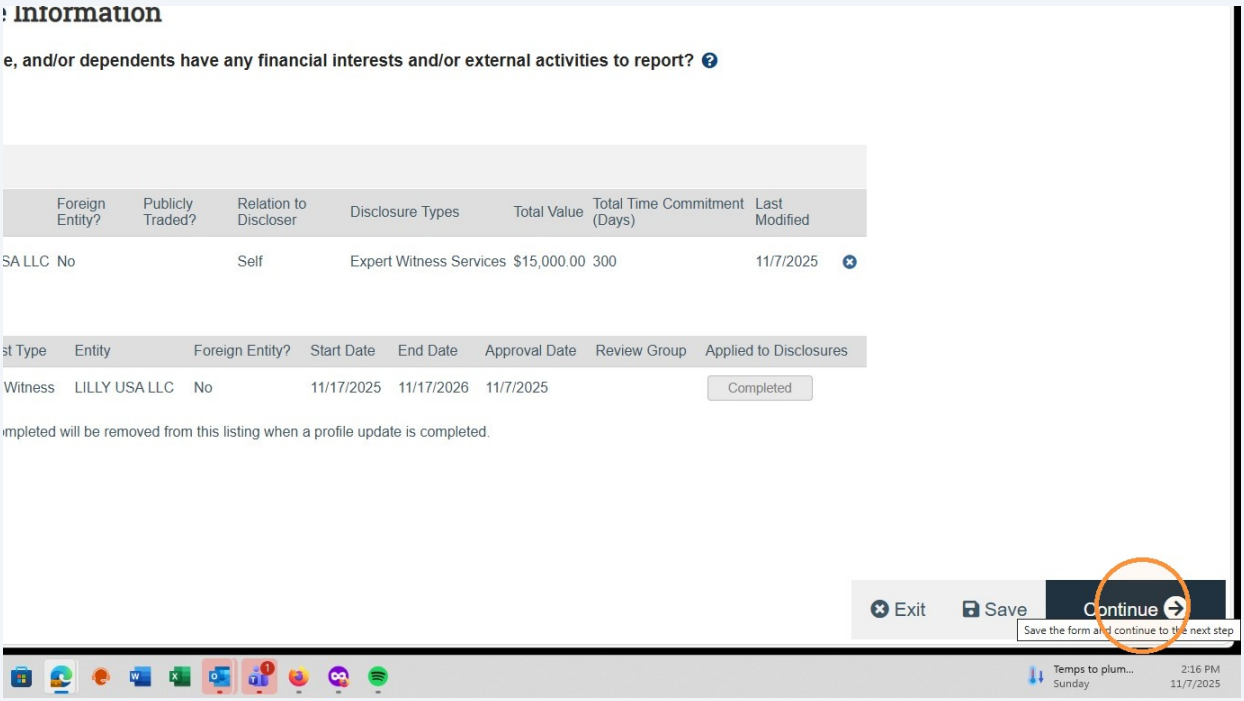
18 Once you've added the entity to your disclosures, click Mark Complete.

After clicking Mark Complete, the button will turn grey and say Completed.

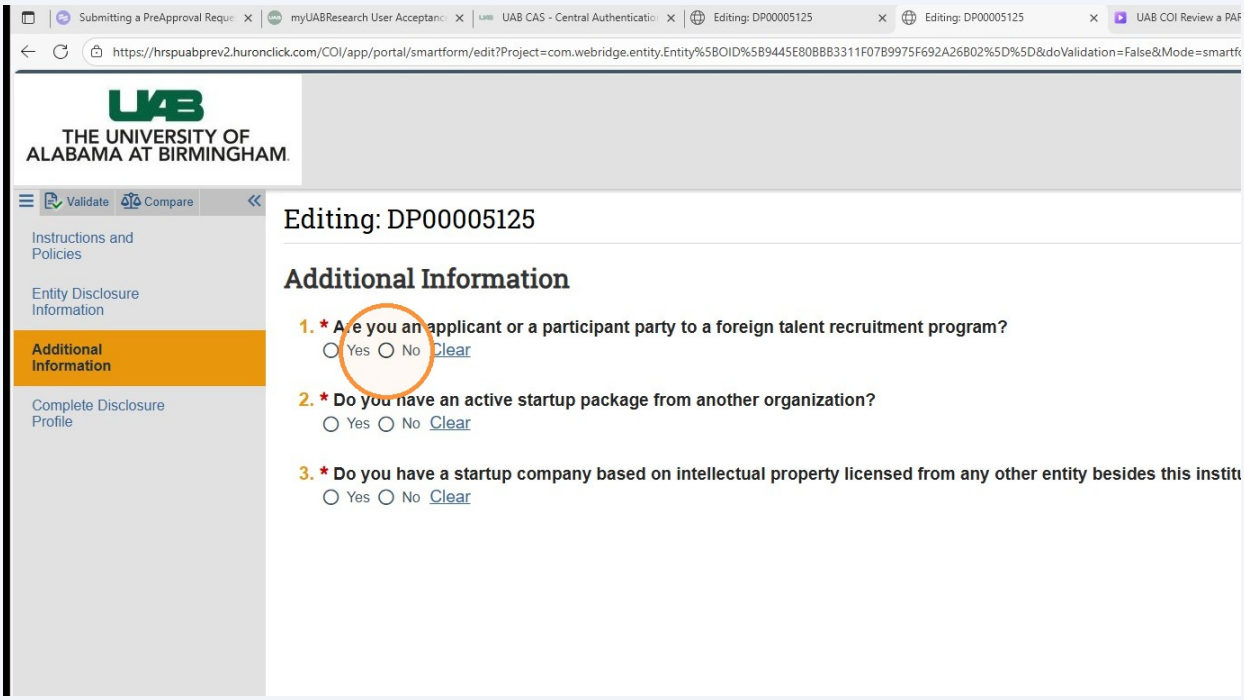
Click Continue.



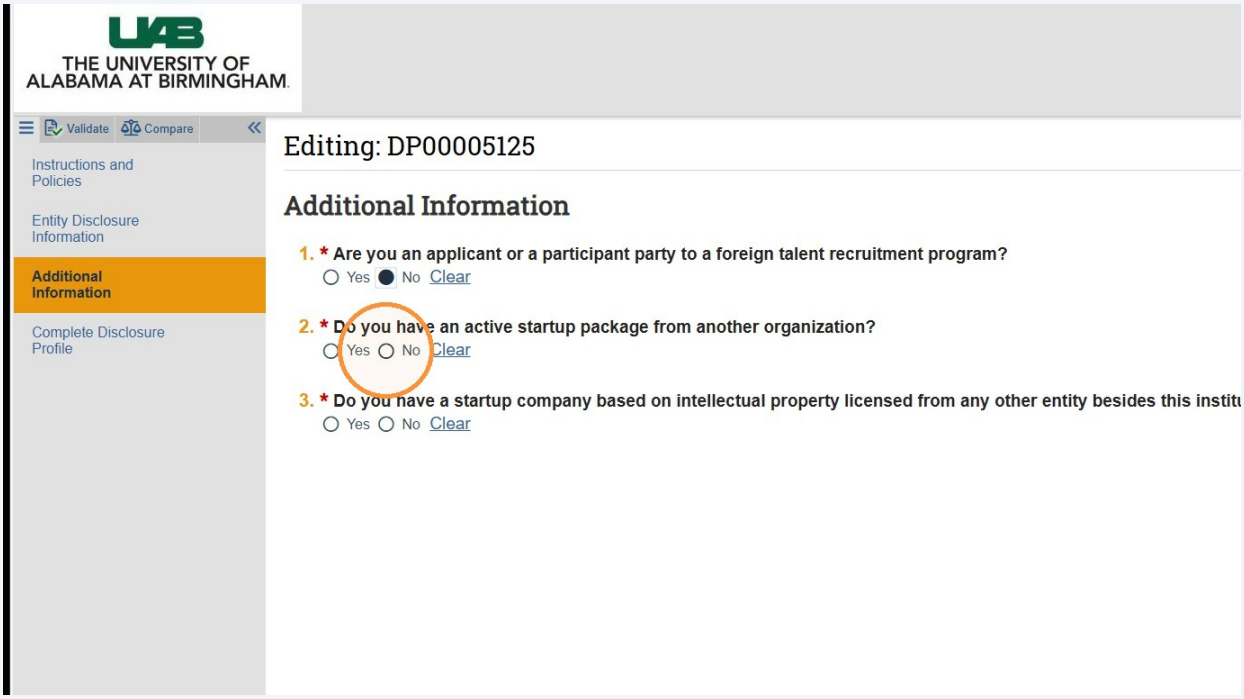
19 Click Continue



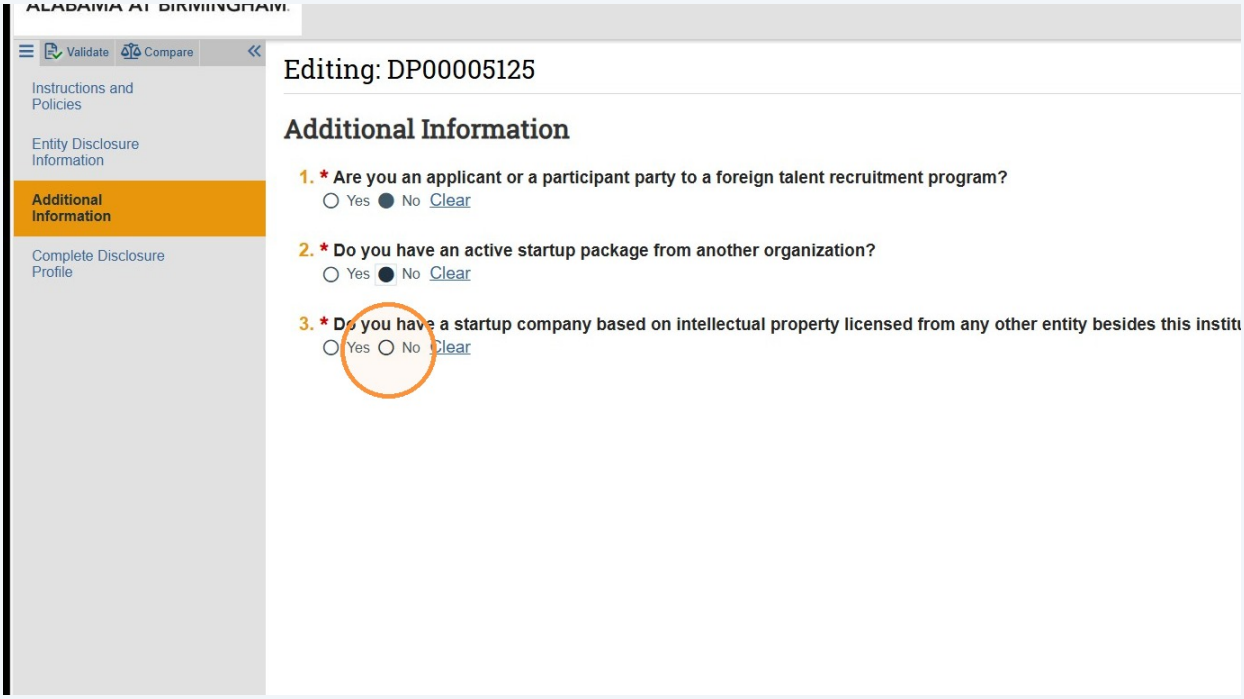
20 Complete required information



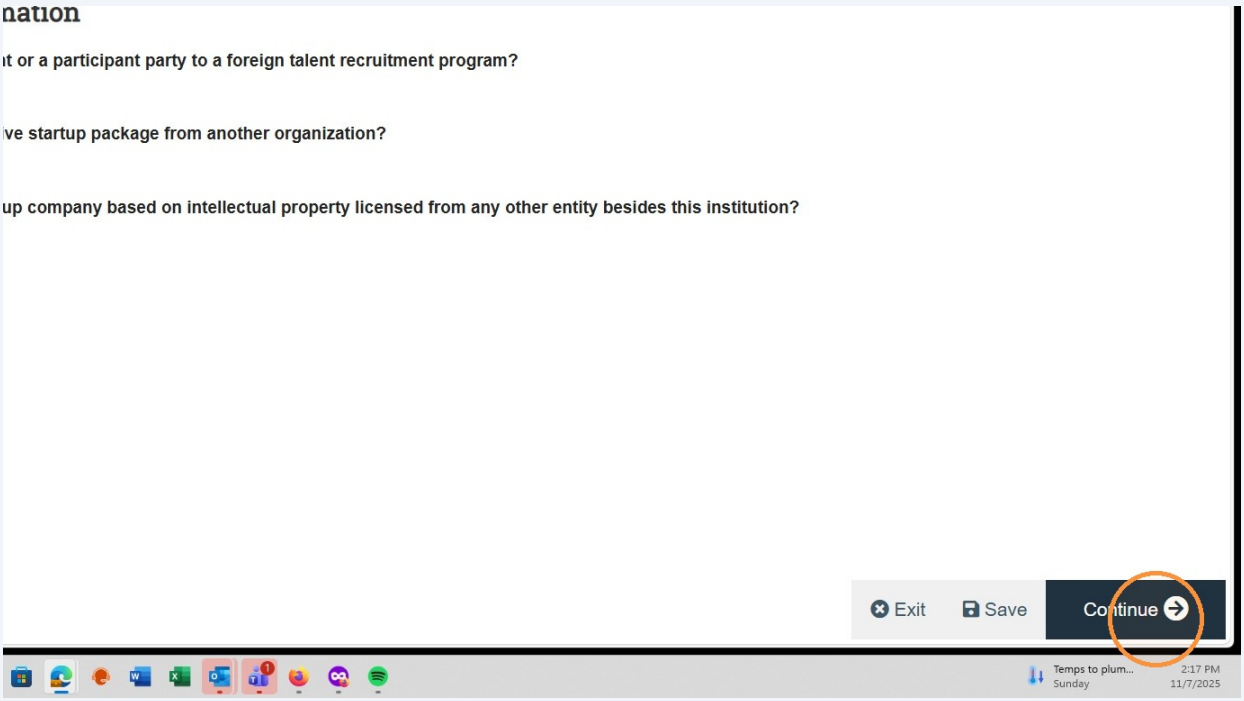
21 Complete Question 2.



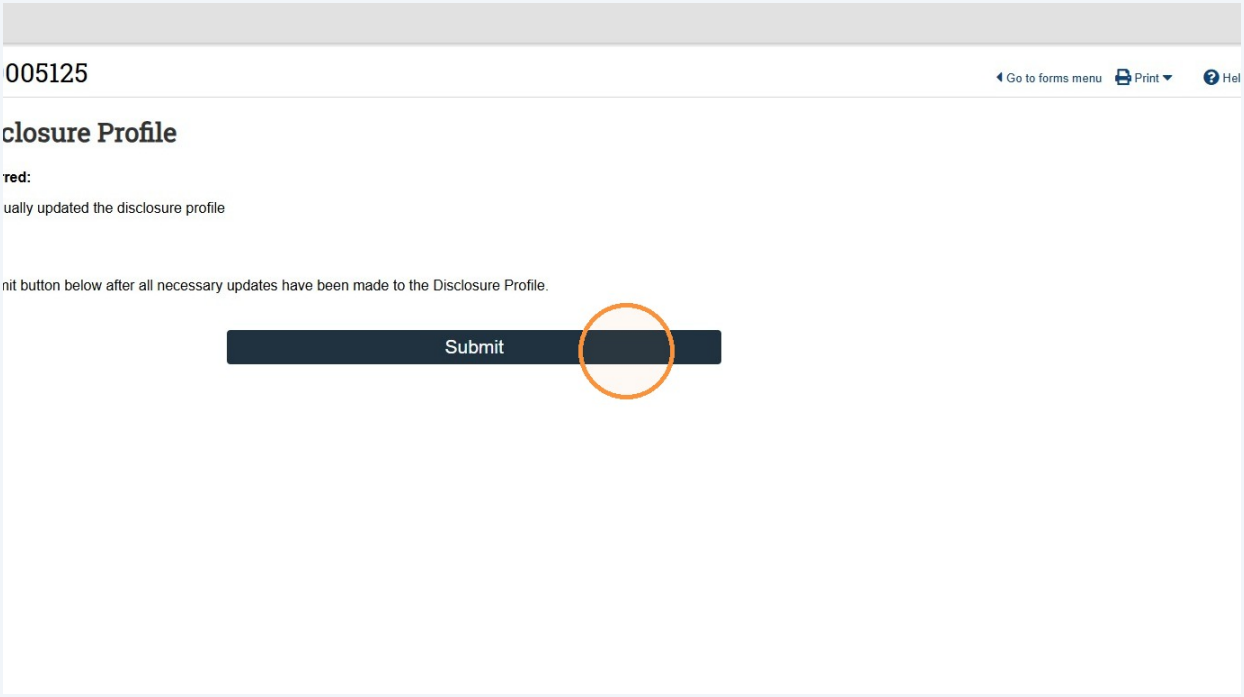
22 Complete Question 3.



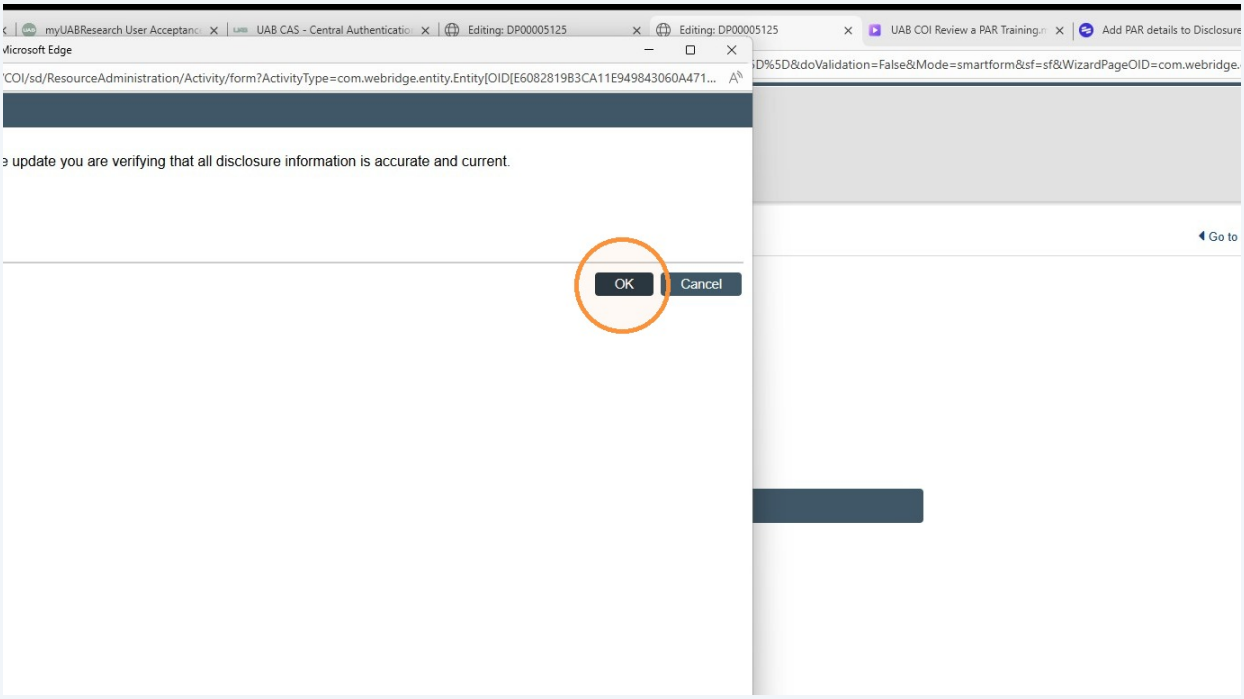
23 Click Continue



24 Click Submit to complete your Disclosure Profile update.



25 Verify that the disclosure information you are submitting is accurate and current and click OK.



26 Your chosen Entity is now reflected in your Disclosure.

