

If you have a COI requiring a management plan, you will receive a request in your 'My Inbox' tab on your dashboard. The system will note that there is action required on your disclosure profile.

The screenshot displays the UT Health San Antonio Enterprise Research Management System (ERMS) dashboard. The top navigation bar includes 'Dashboard', 'Agreements', 'COI', and 'IRB'. The user is logged in as Boris Zelle. The 'My Inbox' tab is active, showing a list of items with columns for 'ID' and 'Name'. A purple arrow points from the 'My Inbox' tab to a specific entry with ID 'DP00002525' and name 'Disclosure Profile for [redacted]'. To the right, a detailed view of this disclosure profile is shown, featuring a prominent orange 'Action Required' banner. Below the banner, it states 'Disclosure profile last completed: 2/6/2024' and 'Proxy update last completed: 10/17/2023'. A 'Request Pre-Approval' button is visible, and a 'Review and Accept Plans' button is highlighted with a purple box. A table on the right shows the profile's state as 'Action Required' as of 2024 1:33 PM.

UT Health San Antonio Enterprise Research Management System (ERMS)

Dashboard Agreements COI IRB

Page for Boris Zelle

Create ▾

My Inbox My Reviews

My Inbox

Filter by ? ID [dropdown] Enter text to search

ID	Name
DP00002525	Disclosure Profile for [redacted]

COI > Disclosures > Disclosure Profile

**Action Required**

Disclosure profile last completed: 2/6/2024  
Proxy update last completed: 10/17/2023

Request Pre-Approval

Review and Accept Plans

Assign Proxy

Date Modified	State
2024 1:33 PM	Action Required

**Review and Accept Plans**

1. Management plans: (Click update on each plan to review and accept it)

**A**

Name	Status
Research Management Plan	Pending Acceptance

Update

Click on update to review the plan.

OK Cancel

**Review and Accept Plans**

1. Management plans: (Click update on each plan to review and accept it)

**B**

Name	Status
Research Management Plan	Accepted

Update

**C**

Accepted

OK

**Edit Management Plan Document Information**

1. Management plan document:

Research Management Plan(0.03) ...

2. Date of plan creator's comments:

2/7/2024

3. Comments from plan creator:

Your management plan was approved at the <committee meeting date>. Please confirm your review and acceptance of the provisions listed in your management plan.

4. Supporting documents from plan creator:

Name  
There are no items to display

5. \* Do you accept this plan?

Yes  No [Clear](#)

Accepting this plan affirms that you agree to abide by the provisions in the plan. This is your 'signature'.

6. Comments:

Empty text area for comments.

OK Cancel

\* Required

COI > Disclosures > Disclosure Profile

**D** No Action Required

Disclosure profile last completed:  
2/6/2024

Proxy update last completed:  
10/17/2023

Request Pre-Approval

Assign Proxy