Disclosure Quick Guide

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Logging Into eDGE
Access eDGE at: http://edge.research.ucla.edu/ and click in the upper-right hand corner.
When prompted, log in using your UCLA Logon ID (formerly Bruin Online account). If you have
forgotten your logon ID or need to reset your password, visit http://logon.ucla.edu

Investigator Briefing
If this is your first time accessing the system, or it has been four years since you last took the
Investigator Briefing, please start with Step 1. If you have already completed this requirement,
proceed to Step 5 to access your disclosure.

1. From the Home page, click .
2. Read the Investigator Briefing.
3. Once you have read and understood the briefing, click Yes.

* Do you certify that you have read and understood the training requirements outlined above?
  (Yes) (No) (Clear)

4. Click Continue >> to proceed with your Disclosure.

**Completing a Disclosure**

5. From the Home page, click Create/Edit Disclosures .

6. Select “Yes,” if you have something to disclose and continue to the next step. Select “No” if you do not have any financial interests to disclose and navigate to Step 41.

* Do you, your spouse or registered domestic partner, or dependent children have any financial interests as defined above?
  (Yes) (No) (Clear)

7. If you need to submit a new disclosure, click New Disclosure . If a disclosure exists for this organization, click the Edit button for the existing Disclosure that should be updated.

8. To enter the organization, click “Select” and choose the Organization from the list.

If the Organization does not appear in the list, enter the Organization Name manually:

If you are unable to find the organization, please enter as text below:

9. Click OK to view the General Information page. Check all that apply for Questions 2 and 3.
10. Click Continue >>.

11. Navigate to the associated section for the financial interest type you chose for Question 2 above:
   - Equity (stock, stock options, or other ownership interests), Step 12
   - Income or other payment for services, Step 22
   - Income from IP rights and interests, Step 29
   - Travel paid directly by or reimbursed by the organization, Step 33
Equity (stock, stock options, or other ownership interests)

12. Complete question number 1 by selecting Yes or No. If you selected Yes, continue to the next step. If you selected No, navigate to Step 15.

13. Complete question number 2.

14. If you answered Yes for Question 2, answer the questions below. If you answered No, proceed to Step 15.

15. Complete question 3 by selecting Yes or No. If you selected Yes, continue to the next step. If you selected No, navigate to Step 17.

16. Complete questions 4a and 4b.
17. Complete question 5 by selecting Yes or No. If you selected Yes, continue to the next step. If you selected No, navigate to Step 19.

5. Has this organization executed a Letter of Agreement, an option, or a license for intellectual property (e.g., technology, tangible research materials, copyrighted software, etc.) that you developed?
   - Yes
   - No
   - Clear

18. If you answered Yes for question 5, answer the questions below. If you answered No, proceed to Step 19.

6. If you answered “yes” to the above question,
   a) Provide a brief non-technical description of the intellectual property:

   b) The intellectual property is owned by:
      - The Regents of the University of California
      - Me, my spouse or registered domestic partner, or dependent child
      - Other - please describe
      - Clear

   If other, please describe:

19. Complete question 7 by adding any additional information that would help to clarify this disclosure.

7. Please add additional information that would help to clarify this disclosure:

20. Click Continue >>.

21. If this is the last financial interest type for your disclosure, navigate to Step 38. If you have additional financial interests to complete, navigate to the appropriate section:
   - Income or other payment for services, Step 22
   - Income from IP rights and interests, Step 29
   - Travel paid directly by or reimbursed by the organization, Step 33
Income or other payment for services

22. Complete question 1.

23. Complete question 2.

24. Complete question 3 by selecting Yes or No. If you selected Yes, continue to the next step. If you selected No, navigate to Step 26.


26. Click if you would like to attach any supporting documentation.
27. Click [Continue >>].

28. If this is the last financial interest type for your disclosure, navigate to Step 38. If you have additional financial interests to complete, navigate to the appropriate section:
   - Income from IP rights and interests, Step 29
   - Travel paid directly by or reimbursed by the organization, Step 33
Income from IP rights and interests

29. Complete question 1.

1. *Income from IP rights and interests received during the past twelve months:

30. Complete question 2.

2. *Please describe the IP rights and interests:

31. Click Continue >>.

32. If this is the last financial interest type for your disclosure, navigate to Step 38. If you have additional financial interests to complete, navigate to the appropriate section:
Travel paid directly by or reimbursed by the organization, Step 33
Travel paid directly by or reimbursed by the organization

33. If you are disclosing travel paid directly by or reimbursed by the organization during the past twelve months, click to complete question 1. If not proceed to Step 35.

34. Enter the destination, duration, and purpose of the trip.
   a. To save the entry and navigate back to the Travel page, click OK
   b. If you need to disclose more than one occurrence, click OK and Add Another
   c. If you would like to navigate back to the Travel page and do not want to save your entry, click Cancel

35. If you are disclosing anticipated travel paid directly by or reimbursed by the organization over the next twelve months, click to complete question 2. If not proceed to Step 37.

36. Enter the destination, duration, and purpose of the trip.
   a. To save the entry and navigate back to the Travel page, click OK
   b. If you need to disclose more than one occurrence, click OK and Add Another
   c. If you would like to navigate back to the Travel page and do not want to save your entry, click Cancel
37. Verify that the travel information entered is correct. Click to view Disclosure Summary screen.

Disclosure Summary

38. Verify that the information entered for your disclosure appears in the Disclosure Summary.

39. If the information needs to be updated, navigate to the appropriate page using the navigation bar.

40. If the information is correct, click to return to Disclosure Detail page.
Submitting Your Disclosure for Review

41. Once you are ready to submit all of your disclosures, click at the far lower right corner to submit your disclosure to RPC.

42. If you have submitted a disclosure that requires review, RPC will begin the review process. You will be notified if additional information is needed.