Disclosure Quick Guide

Table of Contents
Logging Into eDGE .......................................................... 1
Investigator Briefing ......................................................... 1
Completing a Disclosure .................................................. 2
   Equity (stock, stock options, or other ownership interests) .............. 4
   Income or other payment for services .................................... 6
   Income from IP rights and interests ...................................... 7
   Travel paid directly by or reimbursed by the organization ............ 8
   Disclosure Summary ...................................................... 9
Submitting Your Disclosure for Review ................................ 10

Logging Into eDGE

Access eDGE at: https://edge.research.ucla.edu/ and click Login 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 Manage My Disclosures.
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 37.

   * 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 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 20
   - Income from IP rights and interests, Step 25
   - Travel paid directly by or reimbursed by the organization, Step 29
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.

   1. * Do you own stock / stock options in this organization?
      ☐ Yes ☐ No Clear

13. Complete question number 2.

   2. If you answered "yes" to the above question, what is the current value of the shares:

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

   If you answered "yes" to the above question, what is the current value of the shares

   Enter the percentage of ownership:

   If unknown, explain in Question 5.

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.

   3. * Do you have other forms of ownership in this organization?
      ☐ Yes ☐ No Clear

16. Complete questions 4a and 4b.

   4. If you answered "yes" to the above question,

      a) Describe this form of ownership and how you attained it:
17. Complete question 5 by adding any additional information that would help to clarify this disclosure.

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

18. Click Continue >>.

19. If this is the last financial interest type for your disclosure, navigate to Step 34. If you have additional financial interests to complete, navigate to the appropriate section:
   - Income or other payment for services, Step 20
   - Income from IP rights and interests, Step 25
   - Travel paid directly by or reimbursed by the organization, Step 29
**Income or other payment for services**


1. * Disclose income or other payment for services received during the past twelve months:


2. Please provide information about the nature of your activities and the reason for this income or other payment for services:

22. Click [Add] if you would like to attach any supporting documentation.

23. Click [Continue >>].

24. If this is the last financial interest type for your disclosure, navigate to step 34. If you have additional financial interests to complete, navigate to the appropriate section:

- **Income from IP rights and interests, Step 25**
- **Travel paid directly by or reimbursed by the organization, Step 29**
Income from IP rights and interests

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


   2. *Please describe the IP rights and interests:*

27. Click Continue >>.

28. If this is the last financial interest type for your disclosure, navigate to step 34. If you have additional financial interests to complete, navigate to the appropriate section:
   
   Travel paid directly by or reimbursed by the organization, Step 29
Travel paid directly by or reimbursed by the organization

29. 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 31.

30. 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

31. 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 33.

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

**Disclosure Summary**

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

<table>
<thead>
<tr>
<th>Compensation Type</th>
<th>Dollar Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equity</td>
<td></td>
</tr>
<tr>
<td>Income or Other Payment for Services</td>
<td></td>
</tr>
<tr>
<td>Income from IP Rights and Interests</td>
<td></td>
</tr>
<tr>
<td>Sponsored Travel</td>
<td>No</td>
</tr>
<tr>
<td><strong>Total Value</strong></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

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

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

37. Once you are ready to submit all of your disclosures, check the box at the bottom of the Disclosure Details page, verifying that the information entered is accurate and up-to-date. Lastly, click at the far lower right corner to submit your disclosure to RPC as shown below.

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