UFOLIO Introduction

December 12, 2019
Gary Wimsett, JD
Assistant Vice President for Conflicts of Interest
Office of the Provost
Current Form is NOT Working
## UFOLIO Advisory Groups

<table>
<thead>
<tr>
<th>Name</th>
<th>Provide feedback to help…</th>
</tr>
</thead>
</table>
| **UFOLIO Advisory Group**     | • Ensure overall conformance to Florida statutes and University regulation.  
                                • Make the questionnaire and workflow clear, useful, and appropriate.                                                                                           |
| **Deans’ Advisory Group**     | • Make the questionnaire and workflow clear, useful, and appropriate.  
                                • Advise project team of challenges specific to your colleges and departments.                                                                                   
                                • Communicate between the project team and faculty and staff in your college during the project and service launch.                                              |
| **Faculty and Staff Feedback Groups** |                                                                                                                                                                                                                           |
| Pilot Group 1                 | • Ensure the application works as intended.  
                                • Approximately 450 faculty members from across UF                                                                                                            |
UFOLIO Pilot

College of Medicine
- Neurology
- Anesthesiology

College of Engineering
- MSE
- ECE

College of Liberal Arts & Sciences
- English
- Physics

IFAS
- Microbiology and Cell Science
- Food and Resource Economics
## UFOLIO Pilot Results

*Updated at 1:07pm on 12/09/19*

<table>
<thead>
<tr>
<th>Department</th>
<th>Discloser Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Material Science</td>
<td>43/43</td>
<td>100%</td>
</tr>
<tr>
<td>Electrical and Computer</td>
<td>76/77</td>
<td>99%</td>
</tr>
<tr>
<td>English</td>
<td>38/39</td>
<td>97%</td>
</tr>
<tr>
<td>Physics</td>
<td>65/80</td>
<td>81%</td>
</tr>
<tr>
<td>Food and Resource</td>
<td>32/32</td>
<td>100%</td>
</tr>
<tr>
<td>Neurology</td>
<td>54/54</td>
<td>100%</td>
</tr>
<tr>
<td>Microbiology</td>
<td>24/46</td>
<td>52%</td>
</tr>
<tr>
<td>Anesthesiology</td>
<td>42/92</td>
<td>46%</td>
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</table>
UFOLIO Pilot Results

Key Notes

- The average portfolio took 3.3 days to go from submission to the Level 2 decision.
- 66% have completed Level 2 review in less than 3 days.
Proposed Rollout Schedule

- **Pilot 2**
  - College of Business
    - LAUNCH GROUP
    - Group 2
  - College of Journalism and...
    - LAUNCH GROUP
    - Group 1
  - College of Law
    - LAUNCH GROUP
    - Group 2
  - College of Public Health a...
    - LAUNCH GROUP
    - Group 2

- **Group 1**
  - College of the Arts
    - LAUNCH GROUP
    - Group 1
  - College of Education
    - LAUNCH GROUP
    - Group 1
  - College of Engineering
    - LAUNCH GROUP
    - Group 1
  - College of Nursing
    - LAUNCH GROUP
    - Group 1

- **Group 2**
  - College of Health and Hu...
    - LAUNCH GROUP
    - Group 2
  - College of Medicine
    - LAUNCH GROUP
    - Group 2
  - College of Veterinary Medi...
    - LAUNCH GROUP
    - Group 2

- **Group 3**
  - College of Design, Constru...
    - LAUNCH GROUP
    - Group 3
  - College of Liberal Arts and...
    - LAUNCH GROUP
    - Group 3
  - College of Veterinary Medi...
    - LAUNCH GROUP
    - Group 3

- **Group 4**
  - College of Agricultural and...
    - LAUNCH GROUP
    - Group 4
  - College of Dentistry
    - LAUNCH GROUP
    - Group 4
  - College of Pharmacy
    - LAUNCH GROUP
    - Group 4
UFOLIO Login

Username

GatorLink Username

Password

Password

LOGIN
<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Disclosure Type</th>
<th>Status</th>
<th>Department</th>
<th>Ancillaries Pending</th>
<th>Ancillary Question</th>
<th>Modified Date</th>
<th>Created Date</th>
</tr>
</thead>
</table>

1 items
UFOLIO Activity Disclosure

4. * What type of outside activity and/or financial interest do you have or will you have with the outside entity?

- I [my spouse, dependent children, or relatives] have or am seeking approval to have a senior-level position, or a financial interest in an entity that either sells to, buys from, competes with, or enters into any other agreements or contracts with UF.

- I [my spouse, dependent children, or relatives] have an ownership interest of $5,000 or more in a publicly-traded entity that reasonably appears to be related to my UF role. (Do not check if interest is managed by a third party such as a mutual fund.)

- I [my spouse, dependent children, or relatives] have an ownership interest in a privately held entity where the ownership interest reasonably appears to be related to my institutional responsibilities.

- I am a candidate for public office or I hold public office.

- I have or am seeking approval to have a teaching appointment with an entity other than UF.

- I conduct research or am seeking approval to conduct research at, or receive funding from or through an entity other than UF.

- I require students to purchase works or am seeking approval to require students to purchase works I or my spouse created, authored or co-authored for which I or my spouse will receive, or anticipate receiving payment.

- I receive royalties, licensing fees, and/or copyright income from an outside entity.

- I am or am seeking approval to serve as an expert witness and/or legal consultant.

- I provide or am seeking approval to provide professional services to an outside entity related to my UF role.

- I have or I am seeking approval to have a leadership role (board member, officer, trustee), whether compensated or uncompensated, with an outside entity related to my UF role.

Clear
4. * How many days (annually) do you expect will be needed for this activity?

5. * Will UF equipment, facilities, services, resources be used (on a more than incidental basis), or will staff and/or students be involved in this activity or financial interest?
   - Yes
   - No
   - Clear

6. * Will you invent anything, or assist with developing or improving anything?
   - Yes
   - No
   - Clear

7. * Does your contract with the outside entity include language regarding intellectual property, patents, inventions or copyrights?
   - Yes
   - No
   - Clear

8. * In your performance of your UF responsibilities, do you use products or services from this entity?
   - Yes
   - No
   - Clear
**UFOLIO WorkSpace**

**Discloser:** Jax User  
**Department:** COLLEGE-MEDICINE, JACKSONVILLE  
**Attention:** Your Disclosure is still in presubmission. Please click "Submit Disclosure" on the left when you are ready for it to be reviewed.

![Diagram of disclosure process]

**Current Disclosure**

<table>
<thead>
<tr>
<th>General Information</th>
</tr>
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<tbody>
<tr>
<td><strong>1. Entity Name:</strong></td>
</tr>
<tr>
<td>ZOW Pharmaceuticals</td>
</tr>
<tr>
<td><strong>2. EIN Tax Number (optional):</strong></td>
</tr>
<tr>
<td><strong>3. Website URL (optional):</strong></td>
</tr>
<tr>
<td><strong>4. What type of outside activity and/or financial interest do you have or will you have with the outside entity?</strong></td>
</tr>
<tr>
<td>I provide or am seeking approval to provide professional services to an outside entity related to my UF role.</td>
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### Under Review

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<thead>
<tr>
<th>ID</th>
<th>Name</th>
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<th>Status</th>
<th>Disclosure Type</th>
<th>Ancillaries Pending</th>
<th>Ancillary Question</th>
<th>International</th>
<th>Last Modified</th>
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<tbody>
<tr>
<td>DOI00000436</td>
<td>TestV2 Version 2 2019 - Nothing to Disclose</td>
<td>Quick Activities</td>
<td>Pre Submission</td>
<td>Public Office</td>
<td>no</td>
<td>no</td>
<td>no</td>
<td>12/4/2019 2:19 PM</td>
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### Reviewed

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<tr>
<th>ID</th>
<th>Name</th>
<th>Status</th>
<th>Expiration Date</th>
<th>Disclosure Type</th>
<th>Created on</th>
<th>Last Modified</th>
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</table>
UFOLIO Phase 2 Timeline

- UFOLIO Updates Complete: Jan 17
- Pilot 2 Complete: Feb 21
- UF Faculty Onboarded: Jun 26

- UFOLIO Product Enhancements: Nov 4 to Jan 17
- Pilot 2: Jan 20 to Feb 28
- UF Faculty Onboarding: Mar 2 to Jun 26