

Approving a Secondary Employment Form

1. When an employee submits a Secondary Employment Form, you will receive an email. In the InfoEd module, an inbox message will be available and the item will show up in your Assignments widget. Examples are shown in the three screenshots below:

Email:

Dear Reviewer,

A Secondary Employment Disclosure form submitted by **Mallory Ball** is ready for your review and decision.

To review this Secondary Employment, access your [Reviewer Dashboard](#).

Please contact Mallory Ball for additional details about this request. If you need technical assistance, contact coi@wcu.edu or 828-227-7116.

Thank you,
The COI Office

InfoEd Inbox:

Messages Inbox New Switch Recipients You Page 1 of 25 Select Delete

ACTION REQUIRED: Secondary Employment Review Needed for Mallory Ball COI, Office Wed 12-Nov-2025 11:50 AM

Assignments Widget:

▶ Conflict of Interest	Ball, M-	Ball, Mallory	Secondary Employment	Dashboard	Submitted (Routing)	ACTION REQUIRED: Secondary Employment Review Needed for Mallory Ball	12-Nov-2025 11:50:28 AM
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2. By clicking the hyperlink available in either of the communications, the application will open a Reviewer window as shown below

REVIEW

You have been identified as someone who needs to perform an On-line Review. The "Review Dashboard" allows you to:

- "See Comments" others have made when they reviewed this item
- "Add Comments" to this item
- Indicate "Your Decision" on the Review of this item
- See the "Routing Progress" that this item has/will take


HELP

Many of the items being reviewed have deadlines, so please act accordingly. In order to access this information, you will need to be logged in. If you are unsure of your username/password please click [here](#).

ROUTE

1. Review the items listed on the "Review" tab, marking each item "Reviewed" when you have completed your review of it. Note that "Not Applicable" may be an option and if so, you may select that instead of "Reviewed" when appropriate. No item can be left "Un-Reviewed" to continue.
2. Add any comments to the PI, reviewers, administrators or all viewers as appropriate and click the SAVE icon.
3. Select a value in the "Decision" menu. You may be prompted to acknowledge specific representations and certifications. You must "Accept" these in order to proceed if presented. Click the SAVE icon to confirm your decision and complete your review.

If you intend to "Add Comments", you should do so before you set your decision. Once you set your decision and save, you will not be able make any additional changes, i.e. "Adding Comments" or changing "My Decision" after your decision is saved.
If you have any questions regarding your involvement in this process, or what is expected of you please contact:

Office COI 
1 University Way
317 HF Robinson
Cullowhee, NC 28723-9646

[Close](#)

3. To review the Secondary Employment Form, first click the (green) "Review" tab on the left. You can then either view a PDF of the form by clicking the "PDF" hyperlink on the right side of the screen, or you can view the eForm by clicking the "Secondary Employment" link on the left side of the screen.

REVIEW

Conflict of Interest - Secondary Employment

Number: [Ball.M-](#)

Title: Dr. Mallory Ball

PI: Ball, Mallory

Submitted: 12-Nov-2025 11:50:25 AM

Document Type **Added**

[Secondary Employment](#) (Secondary Employment) 12-Nov-2025 11:50:00 AM [PDF](#)

Comments I can see...

Posted By: Mallory Ball
12-Nov-2025 11:50:26 AM
Action Item suppressed by configuration

Add Comments:
To be shared with everyone


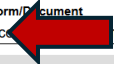

Select a decision:

Approved

Return for Revisions

Not Approved

Comments to be shared with PI(s)



4. When you have reached a decision for the form, you can add any comments as applicable in the “Add Comments” section below:

REVIEW

HELP

ROUTE

Conflict of Interest - Secondary Employment

Number: [Ball.M-](#)

Title: Dr. Mallory Ball

PI: Ball, Mallory

Submitted: 12-Nov-2025 11:50:25 AM

Form/Document	Document Type	Added
Secondary Employment (Secondary Employment)		12-Nov-2025 11:50:00 AM PDF

Add Comments:

To be shared with everyone

B I U [List Icons] [Link Icon] [Image Icon] **A** ▼

Select a decision:

Approved

Return for Revisions

Not Approved

Comments I can see...

Posted By: Mallory Ball
12-Nov-2025 11:50:26 AM
Action Item suppressed by configuration

Comments to be shared with PI(s)

B I U [List Icons] [Link Icon] [Image Icon] **A** ▼

5. Be sure to include the comments in the box most appropriate for the desired audience. There is a comment box for everyone, one for PIs (in this case, that is the person who submitted the form), and one for Reviewers:

The screenshot shows a web interface for reviewing a conflict of interest form. On the left, there is a vertical navigation bar with three buttons: 'REVIEW' (green), 'HELP' (red), and 'ROUTE' (blue). The main content area is titled 'Conflict of Interest - Secondary Employment' and includes the following information:

- Number: [Ball, M.](#)
- Title: Dr. Mallory Ball
- PI: Ball, Mallory
- Submitted: 12-Nov-2025 11:50:25 AM

Below this information, there are two tabs: 'Form/Document' and 'Document Type'. The 'Form/Document' tab is active, showing 'Secondary Employment (Secondary Employment)'. The 'Document Type' tab shows 'Added' on '12-Nov-2025 11:50:00 AM' with a 'PDF' link.

The interface features three comment boxes, each with a rich text editor toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Link, Unlink, and Font Color (A). The comment boxes are:

- 'Add Comments: To be shared with everyone' (top)
- 'Comments to be shared with PI(s)' (middle)
- 'Comments to be shared with Reviewers' (bottom)

To the right of the comment boxes is a 'Select a decision:' section with three buttons: 'Approved', 'Return for Revisions', and 'Not Approved'. A red arrow points from the right towards the 'Comments to be shared with PI(s)' box, indicating where to place comments for the submitter.

In the top right corner, there is a 'Close' button and a 'Comments I can see...' section. This section displays a comment from 'Mallory Ball' posted on '12-Nov-2025 11:50:26 AM', with the note 'Action Item suppressed by configuration'.

6. Once you have logged your comments, please select a decision on the right side of the screen using either the “Approved,” “Return for Revisions,” or the “Not Approved” buttons.

Conflict of Interest - Secondary Employment
Number: [Ball,M-](#)
Title: Dr. Mallory Ball
PI: Ball, Mallory
Submitted: 12-Nov-2025 11:50:25 AM

Form/Document	Document Type	Added
Secondary Employment (Secondary Employment)		12-Nov-2025 11:50:00 AM PDF

Add Comments:
 To be shared with everyone

Select a decision:

- Approved
- Return for Revisions
- Not Approved

7. If you would like to view the route of this Form, you can click the (blue) “Route” tab on the left side of the screen before completing your decision.

Active Routing Progress Close Open Full

Ball,M- - Mallory Ball"Dr. Mallory Ball"

Route Name	Route Type	Step Number/Name	Who	Notified	Notification Type	Decision
Secondary Form	Final Review	Step 1 - Investigator Notification	Mallory Ball	12-Nov-2025 11:50:26 AM	Information Only	Informed -
Secondary Form	Final Review	Step 2 - COI Office	Kelly Tornow	12-Nov-2025 11:50:28 AM	Approval Required	
Secondary Form	Final Review	Step 3 - Supervisor Approval	Kloo Hansen		Approval Required	
Secondary Form	Final Review	Step 4 - HR Approval	Trisha Ray		Approval Required	

Comments

Posted By: Mallory Ball
 12-Nov-2025 11:50:26 AM
 Action Item suppressed by configuration

8. Secondary employment approvals are valid for one year. If the employee continues to engage in external employment beyond that year, they must submit a new approval form annually. Additionally, they must submit a new form any time there are changes to their external employment—such as a new employer, different job duties, or changes in work hours.

For general questions about the policy, contact **Trisha Ray** at trisharay@wcu.edu or 828-227-2522.

For questions about conflicts of interest or the InfoEd module, contact **Kelly Tornow** at ktorow@wcu.edu or 828-227-7116.