

DESIGNATED REVIEWER: How to Complete a Conflict of Interest Disclosure Review

RESOURCES

- **Conflict of Interest Policy:**
https://policy.nd.edu/assets/586594/conflict_of_interest.pdf
- **Non-Research Management Plan Template**
https://conflictpolicy.nd.edu/assets/640504/non_research_conflict_of_interest_management_plan_25_26_.pdf
- **Research Management Plan Template**
https://conflictpolicy.nd.edu/assets/639868/research_conflict_of_interest_management_plan_25_26_.pdf

INSTRUCTIONS

1. You will receive an email notifying you that a review is required. **Click the link in the email** to access.



Dear Jenna Linnea McIntosh,

Kerrie Kristine Jerome has submitted an Annual COI Disclosure that requires your review.

Please click [here](#) to complete your review.

You have received this message because you are the Designated Reviewer for Kerrie Kristine Jerome. If you have any questions, please contact conflict@nd.edu.

Audit & Advisory Services

Office of General Counsel

<https://conflictpolicy.nd.edu>

2. After logging in, you will land on the *All My Tasks* page.

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Welcome, Jenna Linnea McIntosh

Profile & Settings Grants & Contracts COI

Home > Profile & Settings > All My Tasks collapse all | expand all

All My Tasks

If you would like to access Current & Pending Management, please click [here](#).

Filter Search by Task Details

Type: Filter by Task Type

Keyword:

Completed Status: Incomplete

PI/Discloser: Select users

Current Stage: Select

Creation date: 02/24/2026 To

Task Due Date: To

Task Tags: Select

Filter Tasks → Reset Filters

3. In the *My Assigned Tasks* table, click the blue hyperlink in the *Message* column that reads:
Review required for Annual COI Disclosure Review – [Discloser’s Name].

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Welcome, Jenna Linnea McIntosh

Profile & Settings Grants & Contracts COI

Home > Profile & Settings > All My Tasks collapse all | expand all

My Assigned Tasks Following Away Schedule Task Tags

collapse rows expand rows

Type	Action	Message	PI/Discloser	Stage	Details	Due Date	Task Created	Tags	
+ COI	Approve/Modifications required	Annual COI Disclosure Review – Kerrie Kristine Jerome	Kerrie Kristine Jerome	Disclosure			03/05/2026 1:43 PM		

4. The Member’s disclosure will appear on the screen. Review the disclosure contents.

Note: Panels will only appear expanded if there is a **yes** answer. If the panel is collapsed, there is nothing you need to review.

Panel Shortcuts

[collapse all](#) | [expand all](#)

- [Initial Questions](#)
- [Outside Activity](#)
- [Equity Interest](#)
- [Intellectual Property Interest](#)
- [Travel](#)
- [Business COI](#)
- [University Resources](#)
- [Final Questions](#)
- [Attestation](#)
- [Review Comments](#)
- [Admin Review](#)
- [Complete Review](#)
- [Workflow and Requirements](#)

Kerrie Kristine Jerome

/ kjerome@nd.edu / Compliance Associate, Audit and Advisory Services / Audit and Advisory Services (10140)



Date Range Filter

Show Outside Interests active in selected date range.

Select one

Please review the disclosure below. All sections with any 'Yes' response defaults to open. After reviewing the disclosure please go to Administrative Review to categorize the disclosed activity(ies). Management plans may be uploaded in the Management Plan section. University policies on Conflict of Interest, Conflict of Commitment and Outside Activities, training materials, and other resources, as well as who to contact for questions can be found at [conflictpolicy.nd.edu](#).

[collapse all](#) | [expand all](#)

Initial Questions



Outside Activity

In the past twelve (12) months, have you or any of your [Family](#) or [Close Relations](#) engaged in an [Outside Activity](#) in which you or they:

- ☒ Yes ☐ No Received [Remuneration](#) with any [Outside Entity](#) that is engaged in Notre Dame business or that is, or could reasonably appear to be, related to your work at the University?*
- ☐ Yes ☒ No Held a management position or fiduciary role in an [Outside Entity](#) (such as a board member, director, partner or trustee) that is related to your work at the University?*

In addition to the above, in the past twelve (12) months, have you yourself engaged in an [Outside Activity](#) in which you:

- ☒ Yes ☐ No Spent one (1) day or more engaged in an activity with an [Outside Entity](#) including, but not limited to, consulting, employment, teaching or research outside Notre Dame, appointments or affiliations outside Notre Dame (including honorary or other unpaid appointments), board membership, or professional practice.

[collapse all](#) | [expand all](#)

Date Added ▼	Outside Entity	Interest/Relationship	Who	Status	Action
02/17/2026	Navahealth	Consulting	Self	Ongoing	View
02/17/2026	BrainDrive	Corporate Management/Officer (CEO, COO, CTO)	Self	Ongoing	View

Equity Interest

In the past twelve (12) months, have you or any of your [Family](#) Members or [Close Relations](#) had any [Equity Interest](#) (e.g. stock, stock options, or other ownership) with an [Outside Entity](#) that is engaged in Notre Dame Business or is related to your [Professional Responsibilities](#)?*

- ☒ Yes ☐ No

[collapse all](#) | [expand all](#)

Date Added ▼	Outside Entity	Type	Who	Status	Estimated Value	Action
02/17/2026	Navahealth	Private	Self	Active	> 50%	View

Click the blue View action button in any of the panels to view details of the disclosed item.

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2

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Profile & Settings
Grants & Contracts
COI

Panel Shortcuts
collapse all | expand all

Initial Questions

Outside Activity

Equity Interest

Intellectual Property Interest

Travel

Business COI

University Resources

Final Questions

Attestation

Review Comments

Admin Review

Complete Review

Workflow and Requirements

Kerrie Kristine Jerome
/ kjerome@nd.edu / Compliance Associate, Audit and Advisory Services / Audit and Advisory Services (10140)

Intellectual Property Interest
Travel
Business COI
University Resources

In the past twelve (12) months, have you involved students, staff, or the use of Notre Dame facilities or otherwise made use of or allowed the use of University property for the direct benefit of **Outside Entities**?*

☒ Yes ☐ No

collapse all | expand all

Date Added ▼	Outside Entity	Action
02/17/2026	BrainDrive	View

Final Questions

Attestation

☒

I certify that the above information is complete and true to the best of my knowledge. I understand and agree that I have a responsibility to update this report within 15 calendar days of: (1) a change in status of an existing **Outside Activity**, **Conflict of Interest** or **Conflict of Commitment**; and (2) the identification of a new **Outside Activity**, **Conflict of Interest** or **Conflict of Commitment**. *

Review Comments

+ Add Comment

6. If there are any comments you would like to add, **click** the **blue + Add Comment** action button.

7. A new window titled *Add Comment* will appear (see next page).

Add Comment

Section	General
Type*	Select one ▼
Privacy*	Internal X ▼
Comment*	A ▼ T ▼ B I S U                         

10. In the *Admin Review* panel, assign the appropriate COI category to each Outside Entity.

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Grants & Contracts

COI

2

0

Welcome,
Jenna Linnea McIntosh

Panel Shortcuts

collapse all | expand all

Initial Questions

Outside Activity

Equity Interest

Intellectual Property Interest

Travel

Business COI

University Resources

Final Questions

Attestation

Review Comments

Admin Review

Complete Review

Workflow and Requirements

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/ kjerome@nd.edu / Compliance Associate, Audit and Advisory Services / Audit and Advisory Services (10140)

Admin Review

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Please categorize the disclosed activity as a Category A, B, or C conflict as described in the **University Conflict of Interest Policy** for each **Outside Entity** as applicable.

- Category A conflicts - are permissible without a management plan and no further action is required. Forward to Central Compliance.
- Category B conflicts - a management plan is required. Work with the Member to develop and upload a Management Plan. Forward to Central Compliance after a Management Plan is fully approved and signed.
- Category C conflicts - must be eliminated. Add notes to describe how the conflict has been eliminated and Forward to Central Compliance.

Review Comments

Review Attachments

Drop files here or click to choose

Notes for Sponsored Research Office

collapse rows expand rows

Outside Entity	Content Categorization	Action
BrainDrive (Corporate Management /Officer (CEO, COO, CTO)	A – Approved, no further action needed	
Navahealth (Consulting, Equity)	B – Requires management plan	

11. If you select **B – Requires management plan**, a new window titled *Content Categorization* will appear (see next page).

Content Categorization



Outside Entity	Navahealth (Consulting, Equity)
Content Categorization*	B – Requires management plan ▼
Notes*	
Attachments	Drop files here or click to choose

X Cancel

+ Save

12. The *Content Categorization* will pre-populate.
13. Enter in a note.
14. Add the completed Management Plan by dragging/dropping in the PDF or by clicking the purple action button to upload.
15. The text box below will appear once you complete the above step.

Documents to upload pending save:

Kerrie Jerome Management Plan 2026.pdf

16. Click the **blue + Save** action button when complete.
17. You will be returned to the main COI disclosure screen.

18. Within the Complete Review Panel:

- Select **Forward to Central Compliance** from the Review Status dropdown if you feel the complete.
- Select **Return for Modifications** from the Review Status dropdown if you feel the disclosure requires modification.

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Profile & Settings | Grants & Contracts | **COI**

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Panel Shortcuts
collapse all | expand all

- Initial Questions
- Outside Activity
- Equity Interest
- Intellectual Property Interest
- Travel
- Business COI

Complete Review

Forward to Central Compliance as indicated above or Return for Modifications if the disclosure should be returned to the Member for additional information or clarification.

Please review the below Disclosure

Review Status*

Submit

19. Click the blue **Submit** action button to complete your review.

Note: Central Compliance will send Management Plans through the Novolution system for signature / approval.