

This QuickStart Guide highlights the updated Conflict of Interest related procedures and new functions created by the implementation of the Kuali Coeus Conflict of Interest (KC COI).

Initiators: Login to the UCI Zot!Portal, <https://portal.uci.edu>, with your UCInetID and create a proposal in KC Proposal Development (refer to [Kuali Coeus Training Guides](#)).

* required field

Add Person

*Person: Affiliate Search *Proposal Role: select

clear * add person reset

- One **PI/Contact** is required. List all other Principal Investigators as **PI/Multiple**. The Principal Investigator(s) is responsible for the scientific or technical direction of the project.
- List individuals involved with the Principal Investigator in the scientific development or execution of a project as **Co-Investigators**. **Co-Investigators** typically devote a specified percentage of time to the project and are considered senior/key personnel.
- Add all other senior personnel as **Key Persons**.
- An **Investigator** is any individual, regardless of title or position, who is responsible for the design, conduct, or reporting of the proposed or funded research project. This may include collaborators or consultants.

Under the Personnel Tab, list all of the UCI Investigators involved in this project. “Investigators” are all individuals responsible for the design, conduct, or reporting of the project.

First click the magnifying glass icon to search for the Investigator.

Last Name: anteater

First Name:

UCInetID:

Email Address:

Office Phone:

Active: Yes No Both

UCI Campus ID:

search clear cancel

2 items retrieved, displaying all items.

Return Value	UCI Campus ID	Full Name	UCInetID	Email Address	Directory Department	Directory Title	Office Location	Office Phone	School	Active
return_value	000000015883	MARY ANTEATER	maryant	maryant@uci.edu						Yes
return_value	000000015879	PAUL ANTEATER	paulant	paulant@uci.edu						Yes

Search by name or UCInetID. Once you’ve found the correct name select “return value.”

Questions about...

- **KC COI?** Contact the eRA Support Team, era@research.uci.edu
- **Conflict of Interest?** Contact the COI Team, coioc@research.uci.edu

✳️ Unsaved changes will be lost.

expand all collapse all * required field ?

Add Person

*Person: Affiliate Search *Proposal Role:

- One **PI/Contact** is required. List all other Principal Investigators as **PI/Multiple**. The PI/Multiple Investigator(s) is responsible for the scientific or technical direction of the project.
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MARY ANTEATER PI/Contact

Select the individual's Proposal Role from the drop-down menu.

Then click "add person."

Repeat these steps until all UCI Investigators have been added to the proposal.

expand all collapse all * required field ?

Proposal Personnel Abstracts and Attachments **Questions** Special Review Budget Versions Permissions Proposal Summary Proposal Actions Medusa

Document was successfully saved.

General Questions (Incomplete)

Space and Location (Incomplete)

Conflict of Interest (Incomplete)

Questions

Is the sponsor or prime sponsor a non-governmental entity that is not on the exempt sponsor list? More Information...

Yes No

Are there any subrecipient Investigators complying with UCI's PHS or NSF conflict of interest policies? If yes, please attach financial disclosures for all subrecipient Investigators. Subrecipient Investigators on PHS compliant projects must complete the Form 800SR. Subrecipient Investigators on NSF compliant projects must complete the Form 900SR. More Information...

Yes No

For projects sponsored by PHS or NSF or an organization adopting PHS or NSF policies, are there any non-UCI Investigators on this project? If yes, please attach financial disclosures for all non-UCI Investigators. Non-UCI Investigators on PHS compliant projects must complete the Form 800SR. Non-UCI Investigators on NSF compliant projects must complete the Form 900SR. More Information...

Yes No

Export Control (Incomplete)

Compliance (IRB, IACUC, HSCRO) (Incomplete)

IBC and Environmental Health and Safety (Incomplete)

Under the Questions tab, answer the updated Conflict of Interest Questions.

If you select "Yes" to the question on subrecipients, please include the PHS [Form 800SRs](#) or NSF [Form 900SRs](#) in the subrecipient package(s) you upload into KC.

If you select "Yes" to the question on non-UCI Investigators, please upload the PHS [Form 800SRs](#) or NSF [Form 900SRs](#) as a separate labeled file under the Abstracts and Attachments tab.

Other New Functions

Personnel (2)

Personnel Information					
	Person	Role	Proposal Person Certification	Annual Disclosure	NSF Disclosure
1	MARY ANTEATER	Principal Investigator	<input type="button" value="view"/> (Incomplete)	Incomplete	Incomplete
2	PAUL ANTEATER	Investigator		Incomplete	Incomplete

In the Proposal Summary tab, you can see all of the disclosure statuses.

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<p>The screenshot shows a toolbar with the following buttons from left to right: 'delete selected', 'save', 'reload', 'close', 'share proposal', and 'request annual disclosure'. A red arrow points to the 'request annual disclosure' button. Above the toolbar, there is a header area with a checkbox, the name 'MARY ANTEATER', the text 'PI/Contact', and a 'show' button.</p>	<p>In the Personnel tab, you can send an email to Investigators who have not completed their Annual Disclosure by selecting “request annual disclosure.”</p> <p>Note: This email will automatically include all Investigators so you should delete the names of those Investigators who have already completed their disclosures.</p>
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All paper COI disclosure forms are available at: <http://www.research.uci.edu/compliance/conflict-of-interest/forms-references/index.html>.

KC COI Email Tips

KC COI Email Notification	Action
Action Item/Action Required	Respond as soon as possible to avoid delays in processing your project(s)
Reminder	Respond if applicable (ex. you need to update your financial interests or your Annual Disclosure is about to expire)

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