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).

**Principal Investigators:** Login to the UCI Zot!Portal, [https://portal.uci.edu](https://portal.uci.edu), with your UCInetID.

**Complete Personnel Doc (for continuing PHS awards) without an approved PI Assistant** - skip to page 3 if you have a PI Assistant

After SPA Officer receives notice of award, you will receive an email with a link to update and submit the Personnel Doc. Click the provided link.

Alternatively, go to the Zot!Portal and select “Update Personnel for Continuing Awards.”

Then click on the “Document Id” for the Personnel Doc you want to update.

Questions about...
- **KC COI?** Contact the eRA Support Team, [era@research.uci.edu](mailto:era@research.uci.edu)
- **Conflict of Interest?** Contact the COI Team, [coioc@research.uci.edu](mailto:coioc@research.uci.edu)
To edit the list of Investigators:
- Add: Search the name/UCInetID of who you are adding, then select “return value.” Select the Project Role and click “add.”
- Delete: Click “delete” in the individual’s row.

“Investigators” are all individuals responsible for the design, conduct, or reporting of the project.

Check the appropriate boxes:
- If you check either or both boxes, you must attach files for completed form(s) 800SR.
  Click “browse”, select the file, enter a description, and click “add”.

Click “approve” after the list of Investigators is complete.
- If there are no changes to the previously submitted list of personnel including subrecipients and non-UCI Investigators, then click “Approve.”

The award funds will be released once all Investigators have been cleared by Conflict of Interest.

Questions about...
- **KC COI?** Contact the eRA Support Team, era@research.uci.edu
- **Conflict of Interest?** Contact the COI Team, coioc@research.uci.edu
Approve Principal Investigator’s Assistant (PI Assistant)- optional

PI Assistant: administrative staff member you approve to help you update the Personnel Doc for continuing PHS compliant awards. Refer to the PI Assistant QuickStart Guide for instructions on how your staff can request this role.

After the administrative staff member has submitted their request to be your PI Assistant, you will receive an email requesting your approval. Click the link, review and click “Approve.”

Alternatively, you can go to the Kuali Coeus Conflict of Interest section and click the “KSAMS” link or visit https://systems.oit.uci.edu/kfs/ksams/myAccess.htm. Then select the “Approval Queue” tab and open the access request by clicking the “Id.” Review the request and click “Approve.”

Questions about...

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

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Complete Personnel Doc (for continuing PHS awards) with PI Assistant
(PI Assistant must be approved before SPA initiates the continuing award process)

After SPA Officer receives notice of award, you and your PI Assistant will receive an email with a link to update and submit the Personnel Doc. Your PI Assistant can update the Personnel Doc and submit it to you for your final approval.

If your PI Assistant updated the Personnel Doc, then you will receive an email with a link for your final approval of the Personnel Doc. Click “approve.”

*If there are any subrecipients following UCI’s COI policies or any non-UCI Investigators/Collaborators, collect and submit the Form 800SRs. Email the completed forms to coioc@research.uci.edu.

The award funds will be released once all Investigators have been cleared by Conflict of Interest.


KC COI Email Tips

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

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

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