

All Investigators: Login to the UCI Zot!Portal, <https://portal.uci.edu>, with your UCInetID.

All Investigators: Complete your Annual Disclosure

Kuali Coeus Conflict of Interest Options

- [Create/Update Annual Disclosure](#)
- [Create New PHS Travel Disclosure](#)
- [Report a New PHS Significant Financial Interest \(SFI\)](#)
- [Master Disclosure](#)
- [Conflict of Interest / Office of Research website](#)
Link to the Conflict of Interest webpage on the Office of Research website
- [KSAMS \(new Security Access Management System\)](#)
Request / Approve PI Assistant Role

In the Kuali Coeus Conflict of Interest section of the Research tab, click “Create/Update Annual Disclosure.”

Document Overview

Questionnaire

Annual Financial Disclosure (Incomplete)

Questions

1. Do you, your spouse/registered domestic partner, and/or dependent children have any of the following financial interests related to your institutional responsibilities? Click “More Information” for More Information... the definition of “Institutional Responsibilities.”

- Total income or payment of services received over the past 12 months and/or equity interest in a publicly traded entity exceeding \$5,000 when aggregated
- Total income or payment of services received over the past 12 months from a non-publicly traded entity exceeding \$5,000
- Any equity interest in a non-publicly traded entity
- Total payments received over the past 12 months for any intellectual property rights and interests (e.g., patent, copyright, assigned or licensed to a party other than the Regents) exceeding \$5,000

Yes No

Certification

To satisfy the Public Health Service (PHS) and the National Science Foundation regulations, the Principal Investigator and all other Investigators who are responsible for the design, conduct, or reporting of projects subject to these regulations must disclose their personal SIGNIFICANT FINANCIAL INTERESTS - including, the significant financial interests of their spouse/registered domestic partner and dependent child(ren) - in any outside entity that relates to their institutional responsibilities.

Important - Carefully read the below certification statement before clicking “Submit”

By clicking “submit” below, I certify that I have used all reasonable diligence in preparing this complete and accurate disclosure of all my significant financial interests and those of my spouse/registered domestic partner and dependent child(ren) related to my institutional responsibilities.

If I am an Investigator submitting a proposal or on an active award subject to the PHS regulations, I also acknowledge that by clicking submit below, it is my responsibility to: (1) disclose within 30 days any new significant financial interests I acquire or discover and (2) disclose my sponsored and reimbursed travel in the PHS Travel Log in Zot!Portal.

Answer the question and click “Submit” at the bottom of the page.

After you have successfully completed your Annual Disclosure, you will receive a confirmation email and be redirected to your Master Disclosure.

Note: PHS Investigators are required to submit their travel disclosures (if applicable) by clicking the “Create New PHS Travel Disclosure” link in their Annual Disclosure confirmation email.

Questions about...

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

All Investigators: Master Disclosure



Kuali Coeus Conflict of Interest Options

- [Create/Update Annual Disclosure](#)
- [Create New PHS Travel Disclosure](#)
- [Report a New PHS Significant Financial Interest \(SFI\)](#)
- [Master Disclosure](#)
- [Conflict of Interest / Office of Research website](#)
Link to the Conflict of Interest webpage on the Office of Research website
- [KSAMS \(new Security Access Management System\)](#)
Request / Approve PI Assistant Role

To see a record of your disclosures, go to the Conflict of Interest section of the Zot!Portal Research tab, click "Master Disclosure."

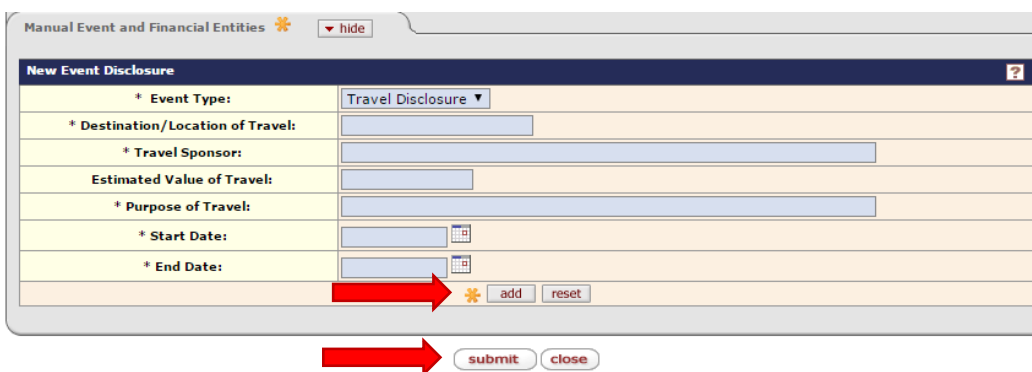
PHS Investigators: Complete a PHS Travel Disclosure for each sponsored or reimbursed trip



Kuali Coeus Conflict of Interest Options

- [Create/Update Annual Disclosure](#)
- [Create New PHS Travel Disclosure](#)
- [Report a New PHS Significant Financial Interest \(SFI\)](#)
- [Master Disclosure](#)
- [Conflict of Interest / Office of Research website](#)
Link to the Conflict of Interest webpage on the Office of Research website
- [KSAMS \(new Security Access Management System\)](#)
Request / Approve PI Assistant Role

In the Conflict of Interest section of the Research tab, click "Create New PHS Travel Disclosure."



Manual Event and Financial Entities hide

New Event Disclosure

* Event Type:	Travel Disclosure
* Destination/Location of Travel:	
* Travel Sponsor:	
Estimated Value of Travel:	
* Purpose of Travel:	
* Start Date:	
* End Date:	

add reset


submit close

Complete required fields marked with an asterisk (*). Click "add." Then click "submit."

After you have successfully completed your Travel Disclosure, you will be redirected to your Master Disclosure.

Questions about...

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

PHS Investigators: Report a “New Significant Financial Interest” excluding travel	
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px 5px;">Kuali Coeus Conflict of Interest Options ▾</div> <ul style="list-style-type: none"> • Create/Update Annual Disclosure • Create New PHS Travel Disclosure  • Report a New PHS Significant Financial Interest (SFI) • Master Disclosure • Conflict of Interest / Office of Research website Link to the Conflict of Interest webpage on the Office of Research website • KSAMS (new Security Access Management System) Request / Approve PI Assistant Role </div>	<p>If you acquired or discovered a new significant financial interest (excluding travel), click the “Report a New PHS Significant Financial Interest (SFI)” link in Zot!Portal for the Annual Form 810. Submit your updated Annual Form 810 to coioc@research.uci.edu.</p>

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)

Questions about...

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