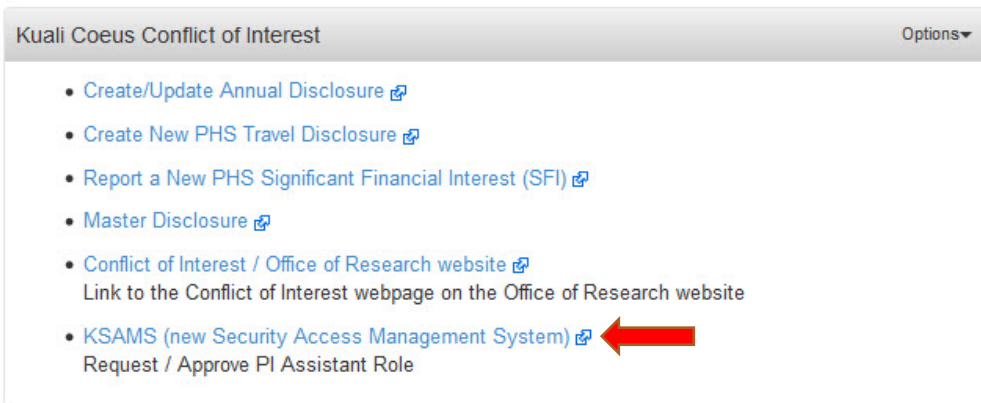


This QuickStart Guide highlights the updated Conflict of Interest related procedures and new functions created by the implementation of the Kuali Coeus Conflict of Interest (KC COI).

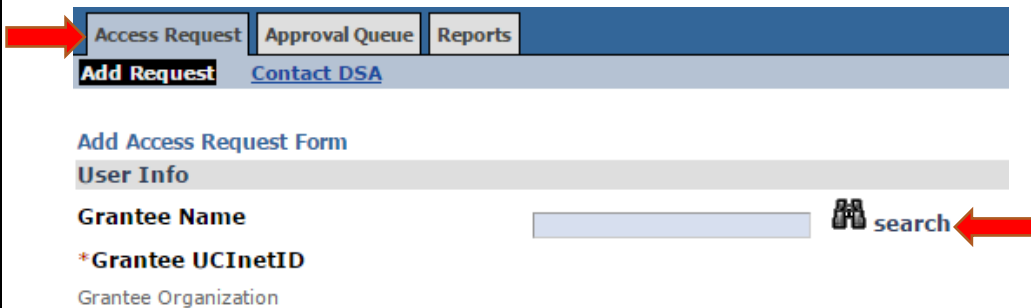
**PI Assistants:** Administrative staff members approved by Principal Investigators to update the Personnel Doc for continuing PHS compliant awards.

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

**Request a role as PI Assistant through KSAMS to access the Personnel Doc**  
(PI Assistant needs to be approved before SPA initiates the continuing award process)

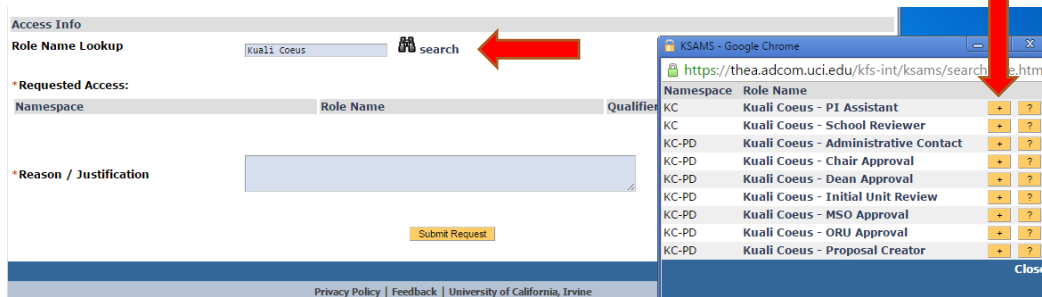


Click “KSAMS (new Security Access Management System)” under the Kuali Coeus Conflict of Interest section or visit <https://systems.oit.uci.edu/kfs/ksams/myAccess.htm>.



Click “Access Request”.

Grantee: Person requesting the PI Assistant role. You can search by the full name or the UCInetID. Make sure to click “search” after typing the name/UCInetID.



Role Name Lookup: Type “Kuali Coeus” and click “Search”.

After new KSAMS window opens, select the “+” next to “Kuali Coeus-PI Assistant”.

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)

**Access Info**

**Role Name Lookup**  search

**\*Requested Access:**

Namespace	Role Name	Qualifiers
KC	Kuali Coeus - PI Assistant	*UCInetID <input type="text" value="kallen"/> *Chart Code <input type="text" value="IR - UC IRVINE"/> *Organization Code <input type="text" value="7352"/>

**\*Reason / Justification**

UCInetID: UCInetID of the Principal Investigator you are assisting.

Reason/Justification: Provide a brief description of the PI Assistant role you are requesting.

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

expand all collapse all

Document Overview

**Document Overview**

* Description:	PHS Sample Proposal for Testing	Explanation:	
Organization Document Number:			

Required Fields for Saving Document

**Required Fields for Saving Document**

Proposal Number:	205024	Sponsor Code:	003465 CHILD HEALTH & HUMAN DEVELOPMENT, NATIONAL INSTITUTE OF
Proposal Type:	New	Project Start Date:	04/29/2016
Lead Unit:	IR-7352 - CIVIL & ENVIRONMENTAL ENGINEERING	Project End Date:	04/28/2017
Activity Type:	Research	Research Type Code:	Basic
Project Title:	PHS Sample Proposal for Testing	Award Type:	Grant

For the Chart Code and Organization Code:

If the original proposal was submitted in KC, then open that proposal and find the information under Lead Unit (XX-####) on the Proposal tab.

- Chart Code: Two letters at the beginning of the Lead Unit.
- Organization Code: Four numbers in the second part of the Lead Unit.

If the original proposal was not submitted in KC, then contact the eRA support team at [era@research.uci.edu](mailto:era@research.uci.edu).

**\*Requested Access:**

Namespace	Role Name	Qualifiers
KC	Kuali Coeus - PI Assistant	*UCInetID <input type="text" value="kallen"/> *Chart Code <input type="text" value="IR - UC IRVINE"/> *Organization Code <input type="text" value="7352"/>

**\*Reason / Justification**

Click "Submit Request."

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)

If you assist multiple Principal Investigators (PIs) and/or your PI submits proposals through multiple departments, you can submit multiple KSAMS requests, one for each PI for each department.

**Updating the Personnel Document for Continuing PHS Awards (after approved as PI Assistant)**

Kuali Coeus Lookups Options ▾

- [Proposals Pending Preliminary Review](#) Displays all proposals in Preliminary Review queue
- [Proposals Pending Institutional Review](#) Displays all proposals in Institutional Review queue
- [Proposals to be Finalized](#) Displays all proposals to be Finalized
- [KC Document Search](#) Search any Kuali document type using document ID  
TIP: Filter with "Document Type"  
  - ProposalDevelopmentDocument, BudgetDocument, NegotiationDocument, InstitutionalProposalDocument, etc
- [Development Proposal Lookup](#) Search development proposals
- [Sponsor Code Lookup](#) Search for active sponsor codes. Please use the "New Sponsor Code Request" link to request for new sponsor codes.
- [Status of Award Setup](#) Search Award Status Setup
- [Status of Award Setup for PIs](#) Search Award Status Setup for Currently Logged in PI
- [Update Personnel for Continuing Awards](#) Update Personnel for Continuing Awards

You will receive an email notification when you have been identified as a PI Assistant on a project. Click on the link.

Alternatively, you can go to Zot!Portal, under the Kuali Coeus Lookups section and select "Update Personnel for Continuing Awards."

4 items retrieved, displaying all items.

Document Id	Document Type	Title	Status	Initiator	Date Created	Route Log
952786	Personnel Document	Personnel Document - TEST12345 : 1	ENROUTE	KAO, WANDA	04/19/2016 04:22 PM	
951274	Personnel Document	Personnel Document - TEST123-AWARD : 1	ENROUTE	WONG, NADIA	03/30/2016 04:20 PM	
949135	Personnel Document	Personnel Document - awardNo6 : 6	ENROUTE	MARGOLIS, NOAH	02/11/2016 04:01 PM	
949129	Personnel Document	Personnel Document - awardNo10 : 14	ENROUTE	MARGOLIS, NOAH	02/10/2016 05:06 PM	

Click the "Document Id" for the Personnel Doc you want to update.

Personnel

*Person	*Project Role	Email	Annual Disclosure	Actions
Add Employee User Name: <input type="text"/>	<input type="text"/>			<input type="button" value="add"/>
1 KAREN ALLEN	Co-Investigator	karen.allen@uci.edu	Negative	<input type="button" value="delete"/>
2 BEVERLEY ALBEROLA	Key Person	beverley.alberola@uci.edu	Positive	<input type="button" value="delete"/>
3 MARCINETTE COPELAND	Principal Investigator	m.copeland@uci.edu	Negative	<input type="button" value="delete"/>
	Co-PI Investigator			

Add: Search the name or UCI NetID of the individual you are adding by selecting "return value". Select the appropriate "Project Role" and click "add."

Form fields for adding a new individual:

- Last Name: anteater
- First Name:
- UCINETID:
- Email Address:
- Office Phone:
- Active:  Yes  No  Both
- UCI Campus ID:
- Buttons:

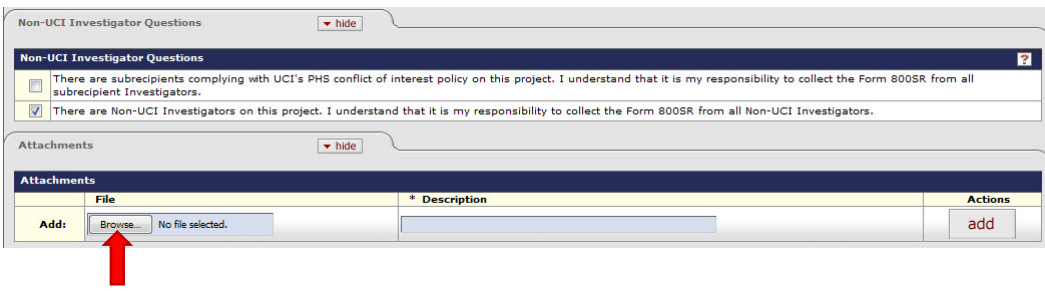
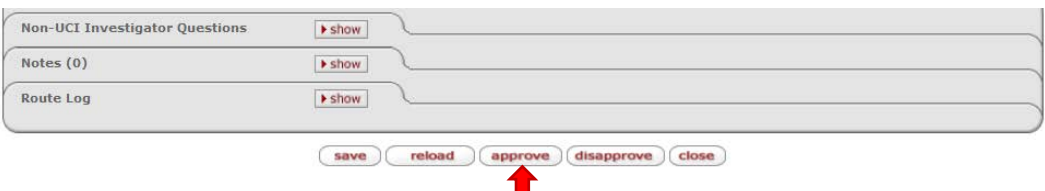
Delete: Click "delete" in the individual's row.

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

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)

	<p>Check the appropriate boxes:</p> <p>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”.</p>
	<p>Click “Approve” after list of Investigators is complete. An email will be sent to the Principal Investigator for final approval of the list.</p>

The award funds will be released once all Investigators have been cleared by the Conflict of Interest team.  
 Form 800SR: <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)

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)