

# UT Southwestern

## Medical Center

Academic Information Systems (AIS)

# electronic Conflict of Interest (eCOI)

Quick Reference Guide

Academic Information Systems (AIS)

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Created: 7/30/2012

Last revision: 7/30/2014

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## OVERVIEW

This document serves as a quick reference guide for the electronic Conflict of Interest (eCOI) system.

## REQUIREMENTS

- UTSW accounts may access eCOI via a browser with a connection to the internet while on- *or* off-campus
- CMC and PHHS users will access eCOI while connected to their organizations' network either on-campus or off-campus while connected via VPN

## SUMMARY

This document covers the following:

- How to log in eCOI
- Creating/updating/submitting a COI statement
- Navigating in eCOI
- Commonly used icons in eCOI

## PROCEDURES

### ACCESS ECOI

#### HOW TO LOG IN ECOI WHILE CONNECTED TO THE UTSW, CMC, OR PHHS NETWORK ON-CAMPUS OR VIA VPN

1. Browse to <http://www.utsouthwestern.edu/>.
2. Click 'Research'.
3. On the "Research" page, click 'Research Administration'.
4. On the left, in the "Research Administration" menu, click 'Conflict of Interest (COI)'.
5. On the "Conflict of Interest" page, on the right, under "Quick Links", click 'eCOI'.
6. On the "eResearch" page, log in with your UTSW, CMC, or PHHS credentials that allow you access to the system.

#### HOW TO LOG IN WITH A UTSW LOGIN ID WHILE OFF-CAMPUS\*:

1. Connect to the internet and browse to <http://www.utsouthwestern.edu/>.
2. In the upper right, click 'My UTSW' and log in with your UTSW login ID and password if prompted.
3. On the "my UT Southwestern" page, click 'Research'.
4. On the "Research" page, click 'Conflict of Interest'.
5. On the "Conflict of Interest" page, under "Conflicts of Interest", click 'Statement of Outside Activities Form'.
6. On the "eResearch" page, log in with your UTSW username and password.

\*These steps *will not work* for users who do not have a UTSW login ID.

## COMPLETE AND SUBMIT A CONFLICT OF INTEREST STATEMENT

After logging in eCOI using the appropriate steps outlined in the section: "[Access eCOI](#)", follow these steps to complete and submit a Conflict of Interest statement:

1. In the upper right section of the eResearch site, click 'My IRB/COI/OAE Home'.
2. Ensure "COI Discloser" is displayed in the left column (see also: "[Roles of a User in eCOI](#)" in the "[Navigating eCOI](#)" section of this document).
3. In the left navigation bar, click the 'Create Statement' button. If this is your first time using this system, you will be automatically directed to the first page of the form.
4. Follow the on-screen prompts and instructions. Click 'Continue' to advance as each section is completed. Required fields are marked with a red asterisk.
5. Once all sections of the form have been completed, you can either click the 'Submit Now' button to immediately submit the form or click the 'Save for Later' button to exit the form and submit at a later date. Note: If you choose to Submit Now and the Finish buttons, your form has been submitted.
6. If you selected 'Save for Later' click the Finish button on the last page of the form. Your statement is complete but not yet submitted.
7. From the workspace, click the 'Submit Statement' button when you are ready to submit your statement.

Note: If you are unable to complete the form in one sitting, click the 'Save for Later' button, followed by 'Exit' to return to your workspace. Your changes will be saved and you may log in to eCOI at any time to complete the disclosure.

## UPDATE/RENEW A COI STATEMENT

1. In the upper right section of the eResearch site, click 'My IRB/COI/OAE Home'.
2. In the main body of the page, click the tab labeled 'All Statements'.
3. Click the link to the disclosure to be edited.
4. Click the 'Update/Renew Statement' button.
5. Make any necessary updates to your disclosure. If you do not have any changes to make, review the current information for accuracy and click 'Exit' at the top of the form. This will direct you back to your workspace.
6. Click the 'Submit Statement' button when you are ready to submit your statement.

## NAVIGATING ECOI

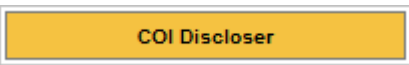
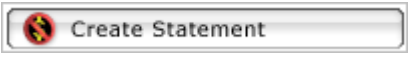
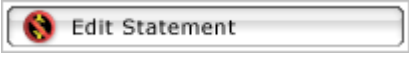
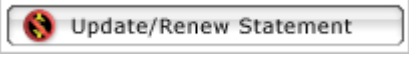
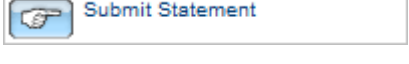
### STATES OF THE CONFLICT OF INTEREST FORM

The eCOI system uses “states” to route the disclosure form through the review process. The orange box displayed in your workspace will reflect the current state of your disclosure form. For example, before your COI statement is submitted to the COI Office, its state will be “Draft”. Once you submit your COI statement, the state will change to “Administrator Review”.

### ROLES OF A USER IN ECOI

It is possible you will have multiple roles in the eResearch system. To ensure you are viewing the COI role, click ‘My IRB/COI/OAE Home’. The yellow box in the left navigation bar will display the role you are viewing. If “COI Discloser” is not displayed, click ‘COI Discloser’ under “My Dashboard” in the left navigation bar.

### ECOI ICONS

	This will display the role you are viewing when you click ‘My Home’.
	Click this button to create your Conflict of Interest statement and start the smart-form.
	Click this button to edit a saved, but un-submitted statement.
	Click this button to renew a previously submitted Conflict of Interest statement or update it as your interests change.
	Click this button when you are ready to submit your statement.