

Office of Research
Office of Research Integrity

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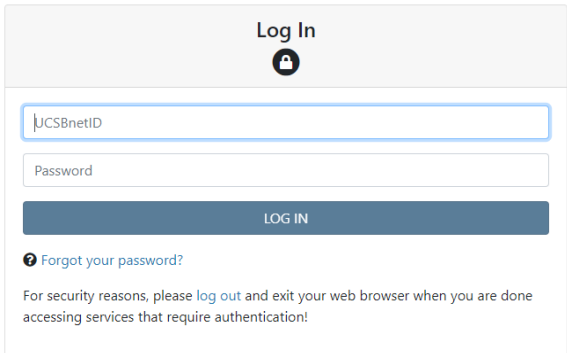
Office of Research Conflict of Interest (ORCOI) Disclosure System User Guide

The Office of Research Conflict of Interest disclosure system (ORCOI) is the online disclosure system for conflict of interest statement submissions required by the Public Health Services, the National Science Foundation, other sponsors requiring similar federal financial disclosures, the State of California, and for human subjects research projects.

When a COI disclosure is required for a contract, grant, gift, or human subjects research project, you will receive an email from coi@research.ucsb.edu with the link to ORCOI <https://orcoi.research.ucsb.edu>.

Log In

Log in using your UCSBnetID and password.



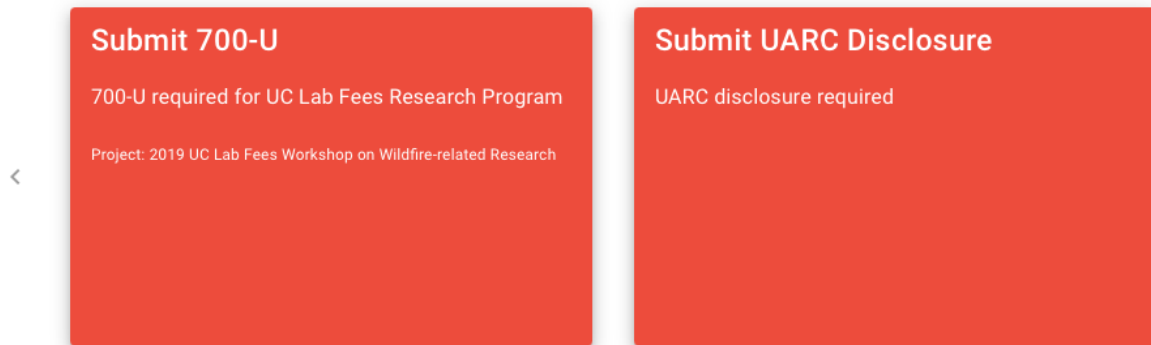
The screenshot shows the UCSBnetID login interface. At the top, there is a dark blue header with the text "UC SANTA BARBARA". Below this is a light gray box containing the login form. The form has a title "Log In" with a lock icon. It features two input fields: "UCSBnetID" and "Password". Below the fields is a dark blue button labeled "LOG IN". There is a link for "Forgot your password?". At the bottom of the form, a security notice reads: "For security reasons, please log out and exit your web browser when you are done accessing services that require authentication!"

For those UCSB personnel or non-UCSB personnel that do not have an existing account within the ORCOI disclosure system, please contact the COI staff (coi@research.usb.edu) to request account activation.

Submit Disclosure

After logging into the system, the red action cards at the top of the home page indicate required disclosure(s).

Action Items (5)



Click on the red card to begin the disclosure submission process. Review the guidance and select continue to begin the questionnaire.

2021 NSF Disclosure

Disclosure #21-0022

The screenshot shows a web interface for a questionnaire. At the top, there is a dropdown menu labeled 'Disclosure Information'. Below it, a progress indicator shows '1 Guidance' as the current step and '2 Investments' as the next step. The 'Guidance' section contains the following text: 'You are required to complete this questionnaire because you have been identified as an investigator on a project funded by the National Science Foundation (NSF), or you are on a project funded by an entity whose conflict of interest policy aligns with the NSF conflict of interest policy.' It also includes a link: 'For additional information you can view the UCSB Office of Research Conflict of Interest resources and links to relevant policies [here](#).' and another line: 'You will be asked to provide answers to questions related to investments, non-UC compensation, patents, royalties, and intellectual property, and gifts/loans.' At the bottom of the guidance section is a blue button labeled 'CONTINUE'.

Should you have a disclosable financial interest, answer yes to the question and click “add Investment/Compensation/Intellectual Property/Gift/Loan/Travel”

The screenshot shows two radio button options: 'Yes' (selected) and 'No'. Below the options is a green button with a plus sign and the text '+ ADD COMPENSATION', with a red arrow pointing to it. Below that is a blue button with the text 'SAVE AND CONTINUE'.

A window will then open where you can enter information about the outside entity:

What is the name of the entity?

XYZ company

What is/was your title or role with the entity, or if you are responding for your spouse or dependent child, what is their title or role?

- Consultant
- Compensated Speaker
- Owner
- Spokesperson
- Board Member

Continue this process for each entity with which you have a disclosable financial interest.

When you are finished, add in any additional comments you may have, upload any supporting files and select submit.

Addendum

The COI staff will conduct a review of your disclosure and assign an addendum if necessary. This document will be used by the Conflict of Interest Committee (COIC) to conduct their review.

Click "Add entity" for each of your outside interests in relation to a project.

Revise or submit new annual disclosure

Updates to annual disclosures for the National Science Foundation, Public Health Service or UARC, can be initiated in two ways:

- 1) Selecting "update" on your current disclosure from the home page, or

Submit Date	Expiration Date	
6/8/2021	6/8/2022	UPDATE

- 2) Selecting [create new disclosure](#)


Common Actions

[+ CREATE NEW DISCLOSURE](#)

Print Disclosure

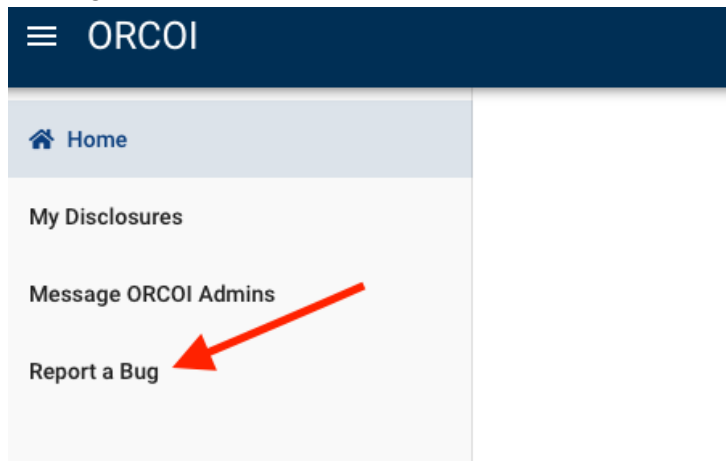
After submitting your disclosure, you can print or save the disclosure as a pdf on the home page by selecting the printer icon.

Current Disclosures
1 current disclosures

Disclosure Number	Disclosure Type	Status	Affiliated Orbit Record(s)	Submit Date	Expiration Date	
 21-0111	NSF	Completed		6/3/2021	6/3/2022	UPDATE

Reporting Bugs

If in the process of submitting your disclosure, you discover an error in the system, please report this bug.



Message COI Staff

If you have any questions about the system or the disclosure submission process, you can contact the COI staff in the system or by email at coi@research.ucsb.edu.

