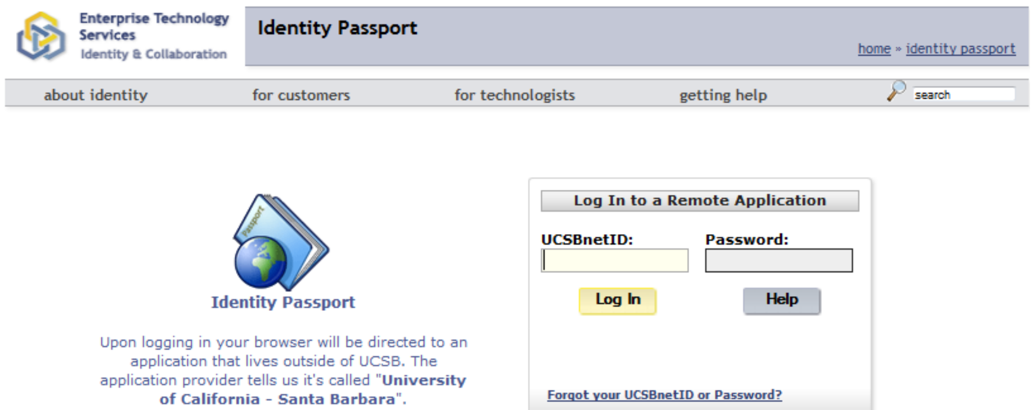
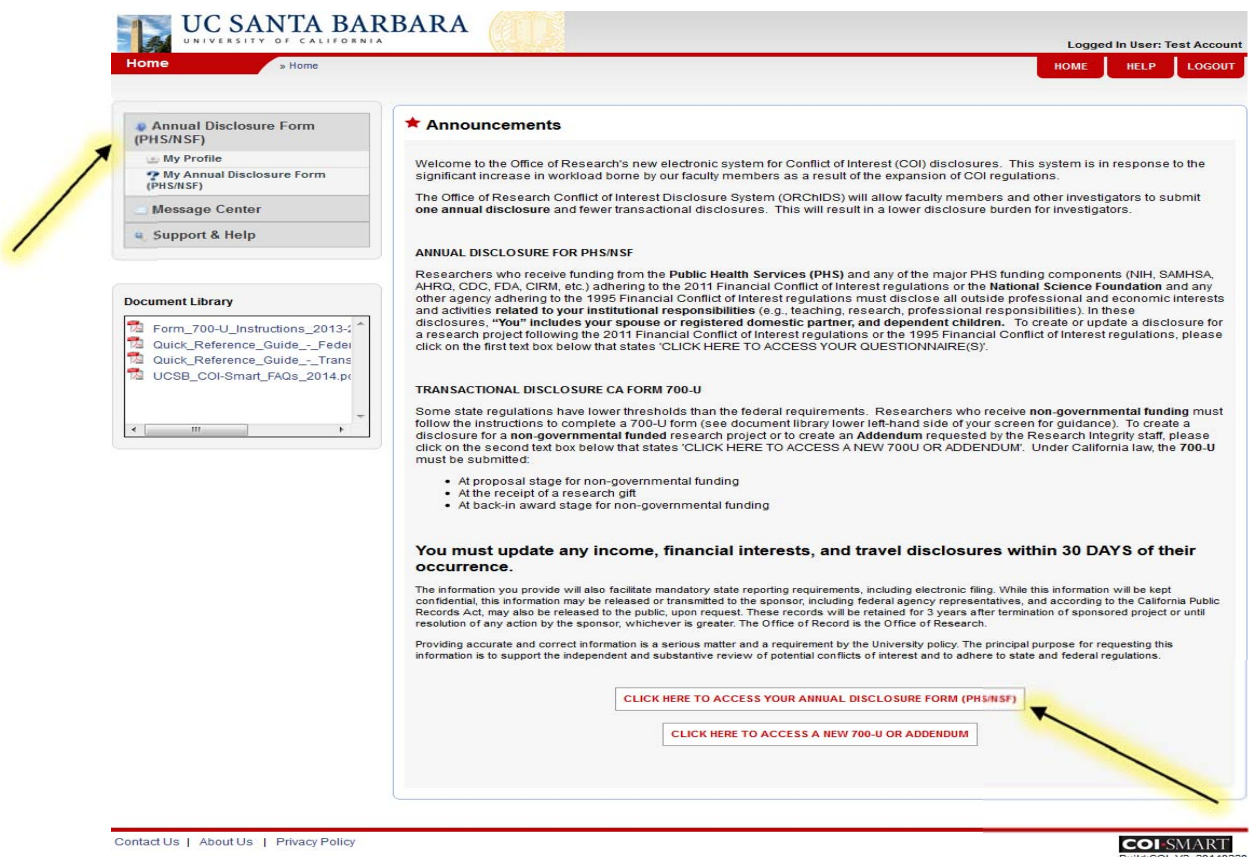
Instructions for individuals filling out an **Annual Disclosure Form (PHS & NSF)** within the Office of Research Conflict of Interest (ORCOI) electronic disclosure system.

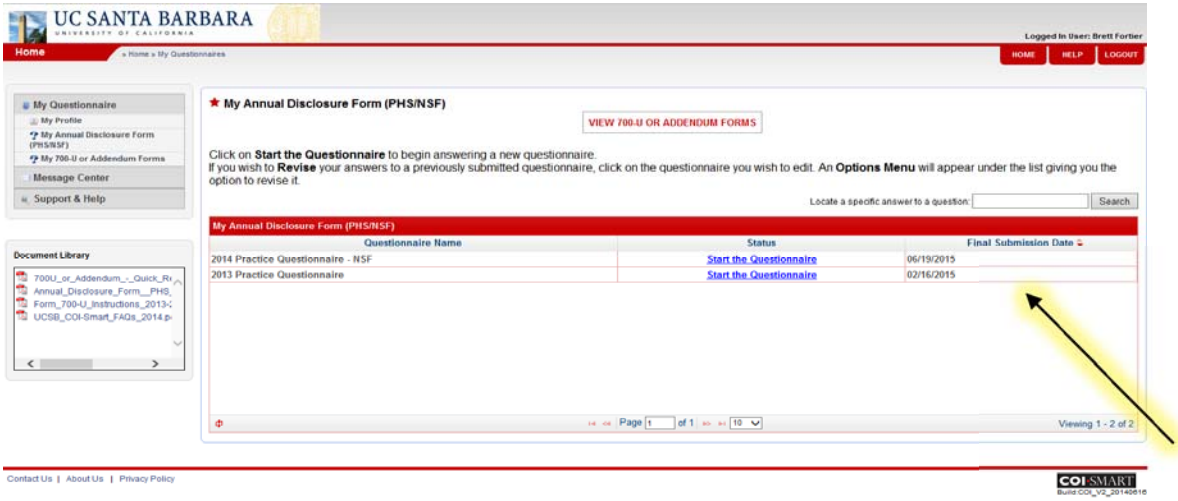
1. You received an email notification indicating your account was activated and to login to **https://ucsb.coi-smart.com**. Non-UCSB personnel that do not have an existing account should contact the COI Coordinator (coi@research.usb.edu) to request an account.
2. Login using your Single Sign On username and password (UCSBnetID).



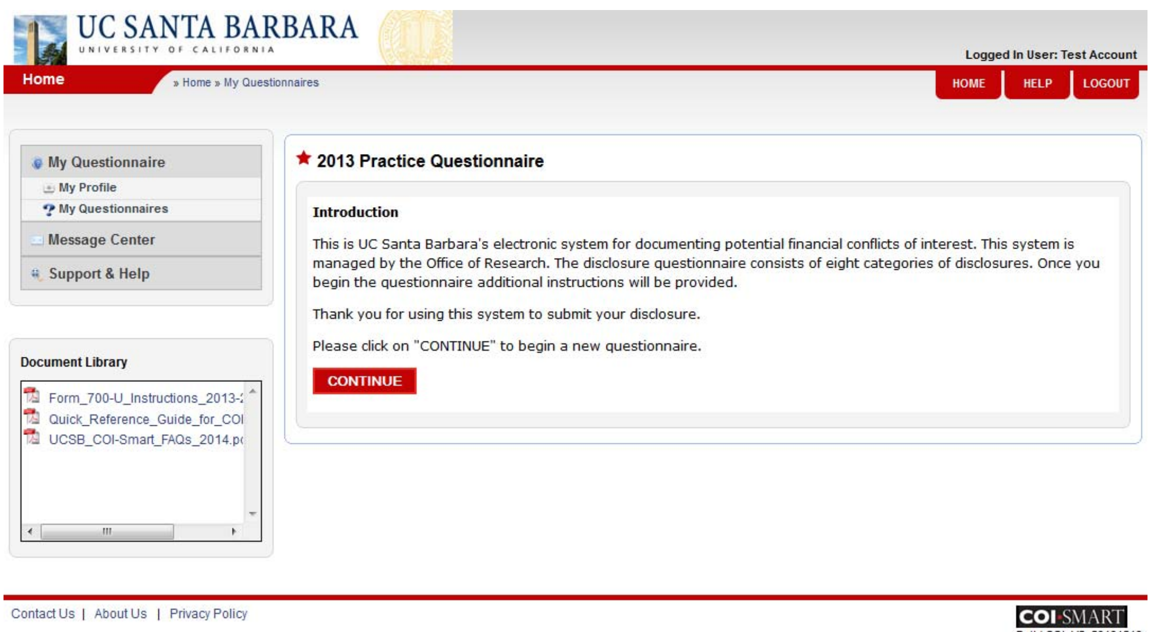
3. Read the Announcements screen and click on “My Questionnaires” in the left menu bar or click on the button labeled “Click Here to Access Your Annual Disclosure Form (PHS/NSF)” located in the central portion of your screen.



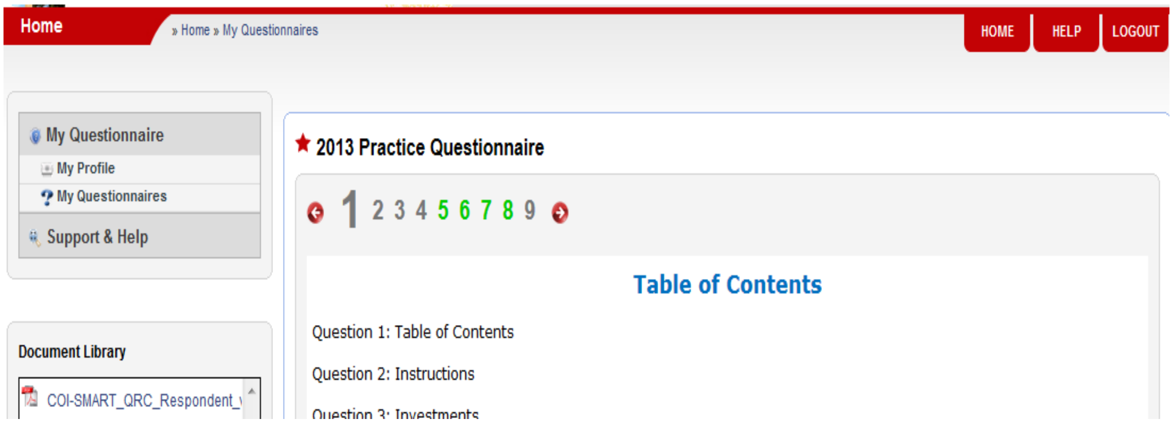
4. Depending upon the funding source for a particular project, users should either select the PHS disclosure form or NSF disclosure form from the list of available disclosures.



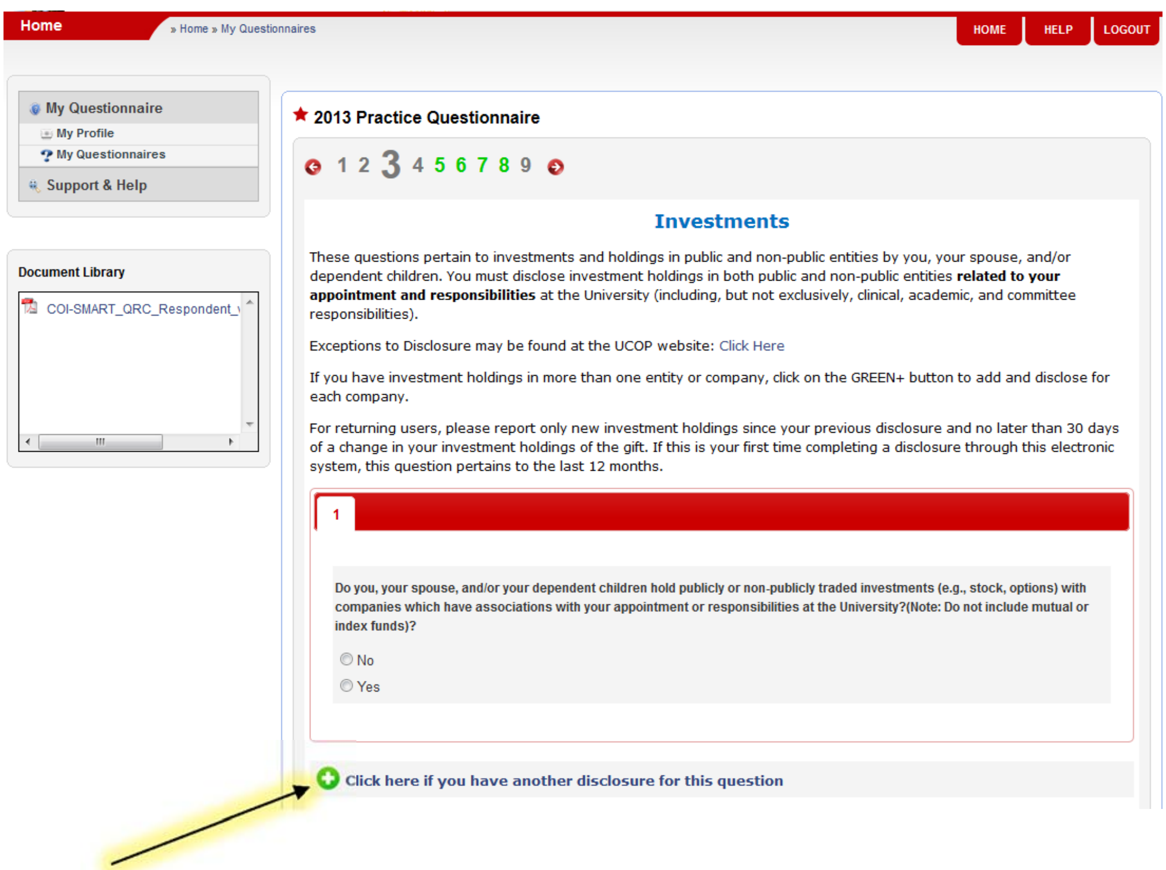
5. Follow the onscreen directions.



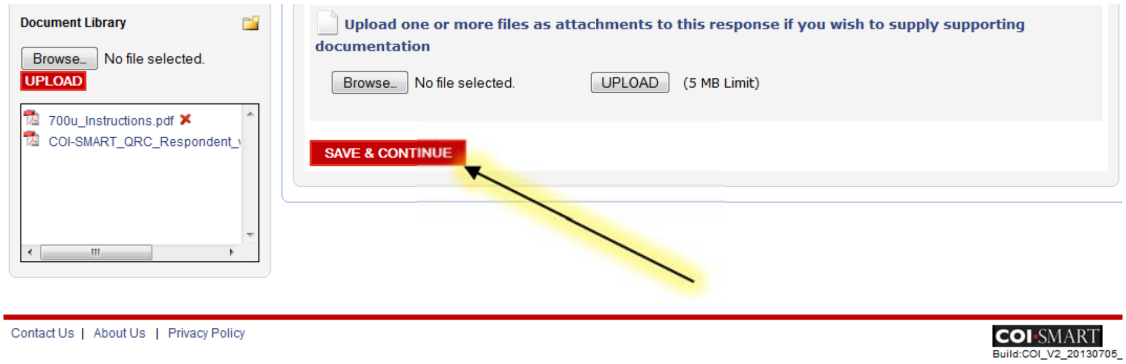
6. Notice the numbered question that is larger than the other numbers. This indicates where you are in the disclosure process. Read the directions and answer each question, selecting "Save and Continue" after each question. Click on a page number to skip ahead or go back to any question.



7. To add multiple outside financial interests of the same type (for example, you have two consulting agreements to disclose), click on the GREEN+ button to add additional interests.



8. Otherwise, click on “Save and Continue” to move to the next page.



9. On the final page, click on “Save and Submit” and in the next box, type **submit** and click FINISH.