

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.ucsb.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.

UC SANTA BARBARA
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Logged In User: Brett Fortier

Home » Home » My Questionnaires

HOME HELP LOGOUT

My Questionnaire

- My Profile
- My Annual Disclosure Form (PHS/NSF)
- My 700-U or Addendum Forms
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Document Library

- 700U or Addendum...Quick_R...
- Annual_Disclosure_Form_PHS...
- Form_700-U_Instructions_2013...
- UCSB_COI-Smart_FAQs_2014.p...

★ My Annual Disclosure Form (PHS/NSF)

VIEW 700-U OR ADDENDUM FORMS

Click on **Start the Questionnaire** to begin answering a new questionnaire. If you wish to **Revise** your answers to a previously submitted questionnaire, click on the questionnaire you wish to edit. An **Options Menu** will appear under the list giving you the option to revise it.

Locate a specific answer to a question: Search

Questionnaire Name	Status	Final Submission Date
2014 Practice Questionnaire - NSF	Start the Questionnaire	06/19/2015
2013 Practice Questionnaire	Start the Questionnaire	02/16/2015

Page 1 of 1

Viewing 1 - 2 of 2

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5. Follow the onscreen directions.

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Logged In User: Test Account

Home » Home » My Questionnaires

HOME HELP LOGOUT

My Questionnaire

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Document Library

- Form_700-U_Instructions_2013...
- Quick_Reference_Guide_for_COI...
- UCSB_COI-Smart_FAQs_2014.p...

★ 2013 Practice Questionnaire

Introduction

This is UC Santa Barbara's electronic system for documenting potential financial conflicts of interest. This system is managed by the Office of Research. The disclosure questionnaire consists of eight categories of disclosures. Once you begin the questionnaire additional instructions will be provided.

Thank you for using this system to submit your disclosure.

Please click on "CONTINUE" to begin a new questionnaire.

CONTINUE

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Build COI_V2_20131213

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.

The screenshot shows the '2013 Practice Questionnaire' interface. On the left is a sidebar with links: 'My Questionnaire', 'My Profile', 'My Questionnaires', and 'Support & Help'. Below this is a 'Document Library' section showing a file named 'COI-SMART_QRC_Respondent...'. The main content area is titled 'Table of Contents' and lists three questions: 'Question 1: Table of Contents', 'Question 2: Instructions', and 'Question 3: Investments'. At the top of the main area, there is a navigation bar with numbers 1 through 9. Number 1 is significantly larger than the others, indicating the current 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.

This screenshot shows the 'Investments' section of the questionnaire. The navigation bar at the top now has number 3 as the largest, indicating the current question. The page contains instructions about disclosing investments and holdings. At the bottom of the question area, there is a red bar with the number '1' and a green plus icon. Below this, there is a question: 'Do you, your spouse, and/or your dependent children hold publicly or non-publicly traded investments (e.g., stock, options) with companies which have associations with your appointment or responsibilities at the University?(Note: Do not include mutual or index funds)?'. There are two radio buttons: 'No' and 'Yes'. At the very bottom of the page, there is a green plus icon with a yellow highlight and an arrow pointing to it, and the text 'Click here if you have another disclosure for this question'.

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

Document Library

Browse... No file selected.

UPLOAD

700u_Instructions.pdf

COI-SMART_QRC_Respondent_

Upload one or more files as attachments to this response if you wish to supply supporting documentation

Browse... No file selected. UPLOAD (5 MB Limit)

SAVE & CONTINUE

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

Submit Questionnaire

By typing "submit" in the box below, I acknowledge that all information that I have provided is correct and complete to the best of my knowledge and I understand that I am required to update the disclosure as changes occur (within 30 days).

You have completed all of the questions for this questionnaire.

Type the word **submit** in the text box below before clicking the "FINISH" button to indicate that you are ready to submit your completed questionnaire.

NOTE: You need to type "submit" and click FINISH for each independent question you wish to revise. After you do so, you will have the opportunity to revise another question.

Type submit :

FINISH

[Cancel](#)