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](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](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
- **Conflict of Interest?** Contact the COI Team, coioc@research.uci.edu
Questions about...

- **KC COI?** Contact the eRA Support Team, era@research.uci.edu
- **Conflict of Interest?** Contact the COI Team, coioc@research.uci.edu

UCInetID: UCInetID of the Principal Investigator you are assisting.

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

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.

Click “Submit Request.”
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)

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.”

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

Add: Search the name or UCNetID of the individual you are adding by selecting “return value”. Select the appropriate “Project Role” and click “add.”

Delete: Click “delete” in the individual’s row.

---

Questions about...
- **KC COI?** Contact the eRA Support Team, era@research.uci.edu
- **Conflict of Interest?** Contact the COI Team, coioc@research.uci.edu
Check the appropriate boxes:

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”.

Click “Approve” after list of Investigators is complete. An email will be sent to the Principal Investigator for final approval of the list.

The award funds will be released once all Investigators have been cleared by the Conflict of Interest team.


### KC COI Email Tips

<table>
<thead>
<tr>
<th>KC COI Email Notification</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Item/Action Required</td>
<td>Respond as soon as possible to avoid delays in processing your project(s)</td>
</tr>
<tr>
<td>Reminder</td>
<td>Respond if applicable (ex. you need to update your financial interests or your Annual Disclosure is about to expire)</td>
</tr>
</tbody>
</table>

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)