These instructions are for PCORI Research Awardees, who are required to complete and submit Conflict of Interest (COI) forms in PCORI Online.

Section 1: Navigating PCORI Online

You will receive a link to the COI. If already logged in to PCORI online, the link will take you directly to the COI. If you are not logged in, follow these instructions to log in to PCORI online.

Log In to PCORI Online

2. Enter your *User Name* and Password.

   **NOTE:** Your *User Name* is the email address you use when interacting with PCORI. If you have previously logged into the PCORI Online, your *User Name* will remain unchanged. You may need to reset your password by clicking on 'Forgot your password?' Navigate to the Appendix for further instructions.

3. Click **Log in**.

4. Once signed in, you will be directed to the home screen. The home screen allows you to access Advisory Panels, Merit Review, Engagement Awards, Research Awards, the Ambassador Program, D&I Awards, and Infrastructure Awards. Depending on the size of your screen, you may need to scroll down to access all of the tabs.
Navigate to Your Project

1. **Click the **Research Awards** button.**

2. **Click **My Projects** to view a list of all your current projects.**
3 Click on the linked Short Project Title to view your project.

**NOTE:** If you navigate to the My Project page and do not see your project, please reach out to pfa@pcori.org in order to gain access to your project(s) in PCORI Online.

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**Section 2: Complete & Approve or Reject the Conflict of Interest (COI) Form**

The Principal Investigator (PI) will complete a COI form on behalf of the project and submit it to the Administrative Official (AO) for approval. Next, the AO will review and approve the COI form or return it for further updates. The COI form should be completed and approved every year between the 11th and 12th month of the project. For example, if the project start date is January 1st, then the COI form should be completed and approved between December 1st and December 31st for each year until the end of the project. The PI and AO will receive an email notification 11 months after the last COI form has been submitted as a reminder to complete the next COI form. This section provides guidance on:

1. Completing the COI Form (PI)
2. Submitting the COI Form for AO Approval (PI)
3. Approving the COI Form (AO)
Complete the COI Form (PI)

1. Scroll down on the Project page until you see the COI & Expertise related list.

2. Click the hyperlink for the COI & Expertise Number.

3. Salesforce presents the COI & Expertise form.
4. Scroll down and verify that the names of the **Key Personnel** are correct. If the information in this section is incorrect, please reach out to fundedpfa@pcori.org. Please note that all changes to Key Personnel require PCORI approval.

![Image of Key Personnel section]

5. Complete the form.

   - **NOTE**: Selecting "No" for question 1 will require the Recipient to answer an additional question, which will be made available immediately upon selecting "No."

6. If you need to attach a file, click the **Upload Files** button.

7. Click **Save** when your answers are complete.

   - **NOTE**: The form can be edited at any time up to the point it is submitted.
8 Salesforce returns you to the project record.

Submit the COI Form for AO Approval (PI)

1 Scroll down on the Project page until you see the COI & Expertise related list.
2 Click the hyperlink for the **COI & Expertise Number**.

Salesforce presents the COI form.

4 Click **Submit for Approval**.
5 Salesforce presents the **Submit for Approval** comment box. Comments are *not* required but may be used to provide additional information.

6 Click **Submit**. An email is sent to the AO indicating the COI form is ready for review and approval.

   **NOTE**: After clicking **Submit**, the form is no longer editable by the PI.

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Approve or Reject the COI Form (AO)

1 Scroll down on the Project page until you see the **COI & Expertise** related list.
2 Click the hyperlink for the **COI & Expertise Number**.

3 Make any updates to the form as required.

   **NOTE:** Example updated text is colored blue *for illustration purposes only*; actual updates will not be colored blue.

4 Click **Save** when your updates are complete.

   **NOTE:** The form can be edited at any time up to the point it is approved or rejected.

5 Click **Approve** or **Reject**.
Enter **Comments** as necessary.

Click **Approve** or **Reject**.

When the AO submits the COI form to PCORI, the PI will receive an email notification that it has been successfully submitted.

The Contract Administrator will review the COI form and send an email notification to the PI and AO accepting or rejecting the submission.

**Email Notification Types**

The table below provides a description of the type of emails that will automatically be sent and to whom to notify Awardees of the corresponding activities.

<table>
<thead>
<tr>
<th>Notifications</th>
<th>Recipient</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approaching COI Form deadline</td>
<td>PI, AO</td>
<td>If a COI form has not been submitted in the past 11 months, notification that the COI form should be submitted in the next 30 days</td>
</tr>
<tr>
<td>COI Expired</td>
<td>PI, AO</td>
<td>If a COI form has not been submitted in the past 12 months, notification that the COI has expired and should be submitted to remain in compliance with your contract</td>
</tr>
<tr>
<td>COI Form Review Process - AO Approval</td>
<td>AO</td>
<td>When the PI has submitted the COI form for approval</td>
</tr>
<tr>
<td>COI Form Approved</td>
<td>PI</td>
<td>When the COI form has been approved by the AO, the PI will receive an email notification</td>
</tr>
<tr>
<td>COI Form Rejected</td>
<td>PI</td>
<td>When the COI form has been rejected by the AO, the PI will receive an email notification</td>
</tr>
<tr>
<td>COI Form Submitted to PCORI</td>
<td>PI</td>
<td>When COI form has been successfully submitted to PCORI</td>
</tr>
</tbody>
</table>
Appendix

This section provides guidance on retrieving a lost password

Retrieve a Lost Password

1. **Navigate to PCORI Online (https://pcori.force.com/engagement).**

2. If you do not know or have forgotten your PCORI Online password, click *Forgot your password?* to retrieve it.

3. Enter your *User Name* (i.e. your email address).

4. Click *Reset Password*. You will receive a system-generated email with instructions on how to reset your password.
Complete and Approve the External COI Form