

**Georgia
Tech**



Georgia Institute of Technology, Conflict of Interest Office

Administrative Users' Guide to eCOI

Reviewing and Approving External Activity Reports
Reviewing Employees' Annual Certifications

eCOI

Electronic Conflict of Interest

6/1/2018

INTRODUCTION

The Conflict of Interest Office (COI Office) developed this guide to assist designated Responsible Unit Officials (School Officials) with the review of employee External Activity Reports (EAR) and Annual COI Certification submissions through the Electronic Conflict of Interest (eCOI) system.

The eCOI system routes EARs to the School Official for initial action, e.g. approval, disapproval, request more information, etc. If the report presents a potential conflict of interest (COI), the system will notify the COI Office for further review. In addition, School Officials may view Annual COI Certifications for all faculty and staff in their unit.

The Georgia Tech Conflict of Interest Management Office hopes this guide provides the insight and information you need to easily navigate the eCOI system and attend to the required COI-related tasks in your unit. Should you have any questions, or wish to schedule a more in-depth training regarding conflict of interest issues for your office or school, please feel free to reach out to the COI Office. We are happy to help.

Sincerely,

Jeff Steltzer, J.D.
Director, Conflict of Interest Management
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Accessing the eCOI System

To access the eCOI online system, you will need a computer or tablet with the ability to connect to the internet. The eCOI system functions optimally on Mozilla Firefox but other commonly used web browsers, such as Safari, Google Chrome, and Internet Explorer 8 are also compatible.

Navigating to eCOI:

➡ Open an internet browser to type or copy/paste the following URL into the address bar.

<https://eCOI.research.gatech.edu>

➡ Log into the eCOI system using your Techworks ID and password, DUO Security Authentication is required. See below for more information about using a Techworks ID.

Georgia Tech **Georgia Tech Login Service**

Enter your GT Account and Password
Login requested by: eCOI.research.gatech.edu

GT Account:

Password:

Warn me before logging me into other sites.

LOGIN clear

ATTENTION: When you are finished using all of your authenticated applications, please log out of this system and exit your browser to ensure you do not leave any of your applications (such as your e-mail) open to other users of this machine.

TERMS OF USE
This computer system is the property of Georgia Tech and is available for authorized use only, in accordance with the Computer & Network Usage and Security Policy (CNUSP). Users should have no expectation of privacy, as any and all files on this system may be intercepted, monitored, recorded, copied, audited, inspected, and disclosed to authorized site(s) and/or law enforcement personnel in order to meet administrative and/or legal obligations.
By using this system, I acknowledge and consent to these terms.

[I don't know my GT Account](#)
[I don't know my password](#)
[My correct username and password aren't working](#)

Techworks ID:

Georgia Tech usernames also known as Techworks IDs are provided by the Georgia Tech OIT Department. If you do not know your Techworks username and password, please contact the OIT Helpdesk: 404-894-7173.

Searching for and Reviewing External Activity Reports

Section Highlights:

Searching for or running reports regarding External Activities from the Administrator Home page

Instructions:



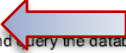
From the Administrator Home Page, click “Search & Report External Activity Reports (EARs).”



[eCOI Home](#) | [Management Tasks](#) | [My Action Items](#) | [Admin Home](#) | [Contact](#) | [Logout](#)

Administrator Home

Instructions: Please click on the activity you would like to act on.

- [Assign an Administrative User](#)
Assign other administrative users within your school or unit to have administrative access and approval permissions
- [Search & Report Annual Certifications \(ACs\)](#)
View the completion status of annual certification reports for any period in time and query the database to produce customized reports.
- [Search & Report External Activity Reports \(EARs\)](#) 
View EAR Summary and detailed information, perform approval actions, and query the database to produce customized reports.
- [eCOI Home](#)
Go to your eCOI home page.

[COI Management Office](#) | [GTRI Ethics and Compliance Office](#) | [Office of Sponsored Programs](#) | [COI Policies](#) |  [NIH Policy-PDF](#) [PDF Reader](#) | [NIH Training](#) | [Federal Acquisition Regulation](#)

Searching for and Reviewing External Activity Reports

Section Highlight:

Searching for External Activity Reports by individual

Instructions:



Search by entering data in one or more field. You can also run a search using any of the drop down boxes, or search using a combination of the two. For example, you can enter the name of a specific employee, select a reporting year, and search by form status.



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Search External Activities

Instructions: Select the criteria to perform a search and view the corresponding report information.

President's Office

Organization: All... State: Pending Dean Approval

Report ID: Company: Services: All...

Last Name: Taylor First Name: SFI: All..

Date Search Type: Submitted From: To:

Assignee: All.. Show Only Terminated Users:

SEARCH RESET

[Save Data as Excel...](#)

Report ID	Name	Company	SFI	Days	Service	State	Submitted	Start Date	End Date	Assignee	Action
E27266	Taylor, Ashley	Conflict of Interest Office	No	1	Other	Pending Dean Approval	05/15/2018	08/01/2015	06/06/2018	--	View Details/View Report

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Searching for and Reviewing External Activity Reports


Section Highlight:

Searching for External Activity Reports by Department

Instructions:



Use the dropdown menu in the 'Organization' field to find your department before clicking "Search."

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Search External Activities

Instructions: Select the criteria to perform a search and view the corresponding report information.

President's Office

Organization: All... State: Pending Dean Approval


Report ID: Company: Services: All...

Last Name: First Name: SFI: All..

Date Search Type: Submitted From: To:

Assignee: All.. Show Only Terminated Users:

SEARCH RESET

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Search External Activities

Instructions: Select the criteria to perform a search and view the corresponding report information.

President's Office » Provost & Executive VP for AA » Sciences, College of » Psychology

Organization: All... State: Pending Dean Approval

Report ID: Company: Services: All...

Last Name: First Name: SFI: All..

Date Search Type: Submitted From: To:

Assignee: All.. Show Only Terminated Users:

SEARCH RESET

Searching for and Reviewing External Activity Reports

Section Highlight:

Viewing an External Activity Report

Instructions:



When you're ready to open an External Activity Report select the "view report" action.



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Search External Activities

Instructions: Select the criteria to perform a search and view the corresponding report information.

President's Office

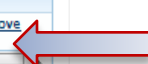
Organization:	All...	State:	Pending Dean Approval		
Report ID:	<input type="text"/>	Company:	<input type="text"/>	Services:	All...
Last Name:	Taylor	First Name:	<input type="text"/>	SFI:	All...
Date Search Type:	Submitted	From:	<input type="text"/>	To:	<input type="text"/>
Assignee:	All..	Show Only Terminated Users:	<input type="checkbox"/>		

SEARCH RESET

[Save Data as Excel...](#)

External Activities										
Name	Company	SFI	Days	Service	State	Submitted	Start Date	End Date	Assignee	Actions
Taylor, Ashley	Conflict of Interest Office	No	1	Other	Pending Dean Approval	05/15/2018	08/01/2015	06/06/2018	--	View Details/Approve View Report

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Approving or Disproving External Activity Reports

Section Highlight:

Making an approval determination

Instructions:



When you are ready to make an approval determination select the “View Details/Approve” action.



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Search External Activities

Instructions: Select the criteria to perform a search and view the corresponding report information.

President's Office

Organization: All... State: Pending Dean Approval

Report ID: Company: Services: All...

Last Name: Taylor First Name: SFI: All..

Date Search Type: Submitted From: To:

Assignee: All.. Show Only Terminated Users:

SEARCH RESET

Save as Excel...

Name	Company	SFI	Days	Service	State	Submitted	Start Date	End Date	Assignee	Actions
Taylor, Ashley	Conflict of Interest Office	No	1	Other	Pending Dean Approval	05/15/2018	08/01/2015	06/06/2018	--	View Details/Approve View Report




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Approving or Disproving External Activity Reports

Section Highlight:

Updating the eCOI system

Instructions:

-  Click on the “Approval” box to select an approval action (options include: Approve, Disapprove, Request Revisions, and Review Not Performed).
-  When you’ve made your selection input notes and attach documentation as necessary.
-  Click “Submit”



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External Activity Details

[Search another External Activity](#)

ID # : E27266
Name : Taylor, Ashley
Company/Entity : Conflict of Interest Office
SFI? : No
Casefile Status :
Form Status : Pending Dean Approval
Anticipated Service : 1 days
Start Date : 08/01/2015
End Date : 06/06/2018
View Report : [View](#)
Assignee : None


Approve / Deny

Transaction History

Email History

Change State

Change Assignee

Approval: 

Note:

Upload Documentation: [Choose file](#)

Note: The “Transaction History” tab maintains an electronic paper trail and reflects the date/time of completion and approval, form status history, and all notes or documents attached to the External Activity Details folder.


Searching for and Reviewing Annual Certifications

After logging into eCOI you will be directed to the Administrator Home Page.

Section Highlight:

Searching for and running reports on Annual Certifications from the Administrator Home page

Instructions:


 From the Administrator Home page, click “Search & Report Annual Certifications (ACs).”



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Administrator Home

Instructions: Please click on the activity you would like to act on.

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View the completion status of annual certification reports for any period in time and query the database to produce customized reports.
- [Search & Report External Activity Reports \(EARs\)](#)
View EAR Summary and detailed information, perform approval actions, and query the database to produce customized reports.
- [eCOI Home](#)
Go to your eCOI home page.

[COI Management Office](#) | [GTRLEthics and Compliance Office](#) | [Office of Sponsored Programs](#) | [COI Policies](#) |  [NIH Policy-PDF](#) [PDF Reader](#) | [NIH Training](#) | [Federal Acquisition Regulation](#)

Searching for and Reviewing Annual Certifications



Section Highlight:

Searching for Annual Certifications by employee

Instructions:



Search by entering data in one or more field. You can also run a search using any of the drop down boxes, or search using a combination of the two. For example, you can enter the name of a specific employee, select a reporting year, and search by form status.



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Annual Certification Search and Reporting

Instructions: Select the criteria to perform a search and to view the corresponding report information.

President's Office

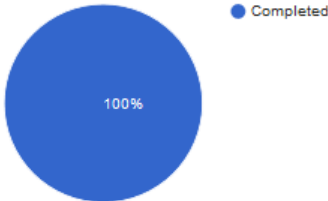
Organization: Form State: Email Address:

Last Name: First Name: Report Year:

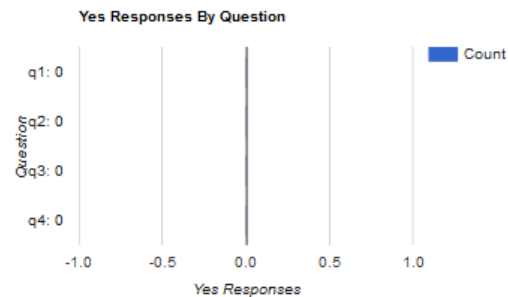
Date Search Type: From: To:

Report ID: Show Only Terminated Users:

AC Reports Complete/Pending



Yes Responses By Question



[Show Questions](#) [Email Reminder](#) [Save Data as Excel...](#)

Annual Certifications							
Report ID	Name	Organization	State	Report Year	Submitted	Created	Actions
A90833	Taylor, Ashley	CTRC	Completed	2018	03/05/2018	03/05/2018	View Details/Approve View Report Unlock for Editing


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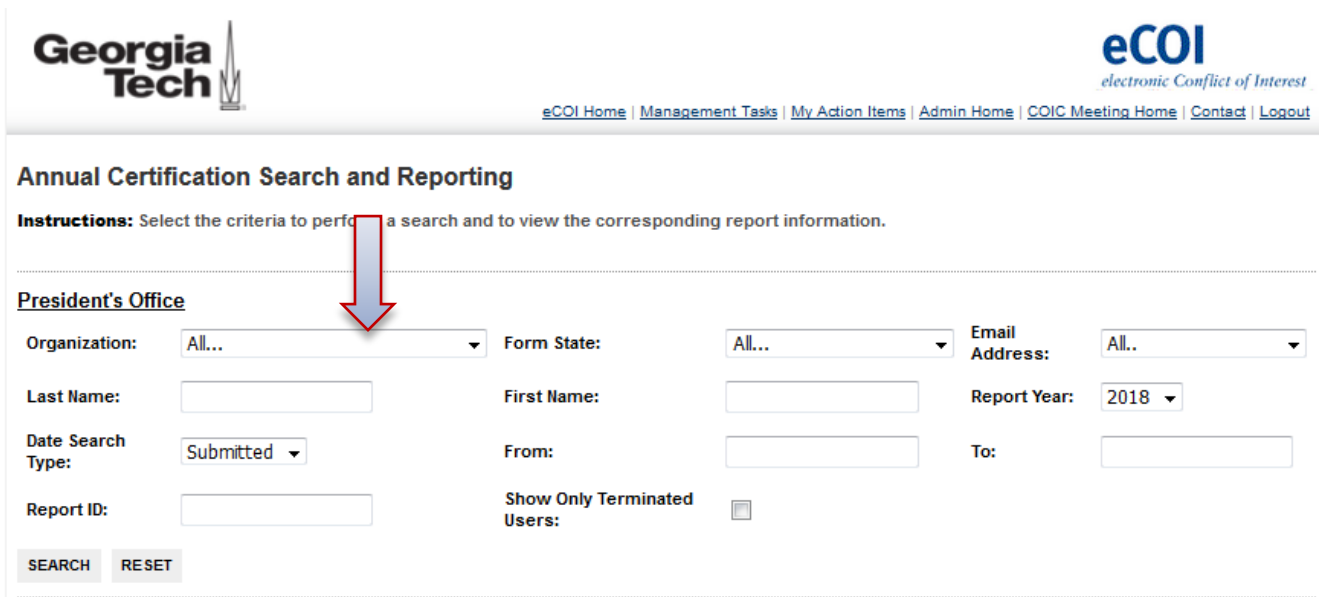
Searching for and Reviewing Annual Certifications


Section Highlight:

Searching Annual Certifications by department

Instructions:

 Use the dropdown menu in the “Organization” field to find your department, then click “search.”



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Annual Certification Search and Reporting

Instructions: Select the criteria to perform a search and to view the corresponding report information.

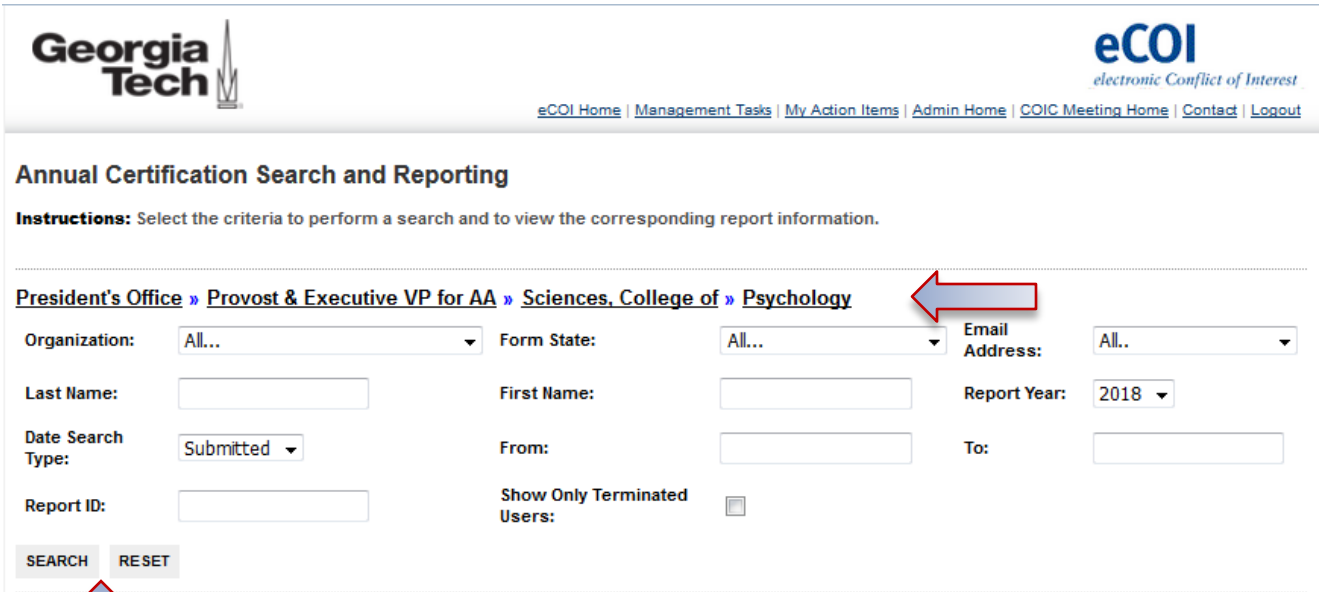
President's Office


Organization: All... Form State: All... Email Address: All..

Last Name: First Name: Report Year: 2018

Date Search Type: Submitted From: To:

Report ID: Show Only Terminated Users:



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Annual Certification Search and Reporting

Instructions: Select the criteria to perform a search and to view the corresponding report information.

President's Office » Provost & Executive VP for AA » Sciences, College of » Psychology

Organization: All... Form State: All... Email Address: All..

Last Name: First Name: Report Year: 2018

Date Search Type: Submitted From: To:

Report ID: Show Only Terminated Users:

Searching for and Reviewing Annual Certifications



Section Highlight:

Opening an Annual Certification for review

Instructions:



When you're ready to open an Annual Certification select the "View Report" action.



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Annual Certification Search and Reporting

Instructions: Select the criteria to perform a search and to view the corresponding report information.

President's Office

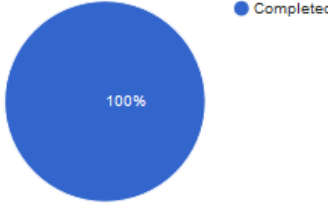
Organization: Form State: Email Address:

Last Name: First Name: Report Year:

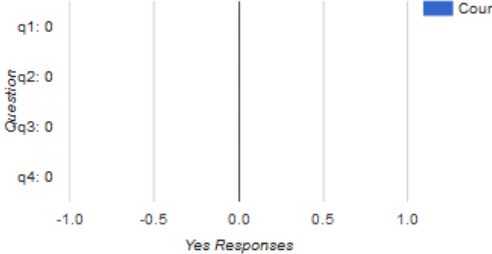
Date Search Type: From: To:

Report ID: Show Only Terminated Users:

AC Reports Complete/Pending



Yes Responses By Question



[Show Questions](#) | [Email Reminder](#) | [Save Data as Excel...](#)

Annual Certifications							
Report ID	Name	Organization	State	Report Year	Submitted	Created	Actions
A90833	Taylor, Ashley	CTRC	Completed	2018	03/05/2018	03/05/2018	View Details/Approve View Report Unlock for Editing

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Need Additional Help?

Georgia Tech Conflict of Interest Office:

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505 10th St NW
Atlanta, Georgia 30332

Phone: (404) 385-4702
Fax: 404-385-2078
Email: COI@gatech.edu

Website: <http://www.coi.research.gatech.edu/>