

Instructions for the COI Declaration Tool – First Time Reviewers

This document provides instructions for first time users of the PHSa COI declaration tool (<http://coi.phsa.ca>).

See POD COI Instructions (<http://pod/research/conflict-of-interest/declaring-coi/when-how-declare/Pages/InstructionsforCOIdeclarationtool.aspx>) for instructions for repeat visits to the site.

Reviewing a COI Form for the First Time –Reviewer Instructions

1. Connect to the PHSa, CFRI, GSC, or CRC network (log into your work computer either onsite or remotely)
2. Go to the COI Declaration tool <http://coi.phsa.ca>
3. Enter your username and password Follow the instructions at the top of the login page, making sure to enter the network abbreviation before your username (i.e., PHSABC\, PHSAGE\, CRC\, or BCRICWH\)
 - a. This is the same username and password you use to access your work computer
4. Enter your personal information in your profile
 - a. Select your Agency
 - b. Select your department from the drop-down menu that appears
 - c. If applicable, select your sub-department from the drop-down menu that appears
 - d. “Save” your profile when finished completing the information
5. Click the “Reviewer” button
6. You will be redirected to the "COI Declarations Assigned to You for Review" page
7. **Click on a researcher's form to review it**
8. Review the form
 - a. You can enter comments for the researcher in the boxes on the right side
 - b. Click the **Approve** button if the COI is appropriately manage
 - c. Click the **Needs Revision** button if the COI needs changes
 - d. Click the **Prohibit** button if the COI is not permitted no matter what changes are made
 - e. If you are unsure about something in the form you can click **Escalate** and have your supervisor review the form

Once you have made your decision, an email will be sent to the researcher letting them know.