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, disproval,
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
Jeff.Steltzer@gtrc.gatech.edu
404-894-6925
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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.

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).”
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.
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.”
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.

[Image of eCOI interface with search and report viewing options]

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

[Form fields for report ID, organization, state, etc.]

External Activities
[Table showing report details with options to view details/approve or view report]
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.

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

President's Office

Search
RESET
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”

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).”
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.
Section Highlight:
Searching Annual Certifications by department

Instructions:
Use the dropdown menu in the “Organization” field to find your department, then click “search.”
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.
Need Additional Help?

Georgia Tech Conflict of Interest Office:
Research Administration
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/