Protocol Specific COI (PSCOI) Disclosure Instructions

To create a PSCOI disclosure, login to RUSH’s Research Portal and complete the following steps.

1) From the main portal page, click the Master Project tab (located at the top green menu bar).

![Master Project tab](image)

2) From the My Administrations page, enter the ORA number in the text box shown below and press the Enter key. Be sure ‘ID’ is displayed in the Filter by dropdown menu.

![My Administrations page](image)

3) Click the hyperlink of the ORA study name. This will take you to the Master Project Summary Workspace page.

![Master Project Summary Workspace page](image)

4) From the Master Project Summary Workspace page, scroll down until you reach the Create section (located on the left column of the page), and click the Protocol Specific COI button.

![Protocol Specific COI button](image)

5) From the COI Welcome page begin your disclosure. Answer all four questions with a red asterisk (*). Note: A red asterisk (*) indicates a required field and must be answered before moving on to the next page. After answering each question, click the Continue button along the bottom right corner. This will take you to the COI Role in Study page.

![COI Welcome page](image)
6) From the COI Role in Study page, scroll down until you reach the section Role in Study and choose your role(s) for that specific study. Example is shown below.

![Role in Study example]

7) Below the list of study roles, answer the next required question then click the Continue button along the bottom right. This will take you to the COI Disclosure – Activity page.

![COI Disclosure Activity page example]

8) From the COI Disclosure – Activity page, you will have the option to select one or more activities to report. Choose an activity to make a disclosure by clicking the +Add button as shown below.

![Sponsored Travel example]

   a) A window will appear for you to add an Entity or Sponsor and the related financial or fiduciary activity. After answering all questions, click the OK button at the bottom of the page.

   b) If the Entity/Sponsor is not listed in the dropdown list, Go back to the Master Project main page and scroll down until you reached My Activities (located on the left column of the page) and click the ‘Request New Prime or Direct Sponsor’ button. Provide the requested information and the entity will be added to the ‘Sponsor’ list.

9) After entering the activity information, you will be taken back to the COI Disclosure – Activity page where you will see a brief summary of your disclosure. When all activities have been reported, click the Continue button. This will take you to the Explanation of the Conflict of Interest page.

![Sponsored Travel example]

10) From the Explanation of the Conflict of Interest page, explain in detail a) the reason of the activity, b) how the disclosed entity(ies) relates to this research protocol, and c) how the financial interest is or may be related to this research protocol. After entering your explanation in the text box, click the Continue button to the COI Financial Submission page.

   * Please describe, in the text box below, in what way your disclosed entity relates to this research protocol.

   [Explanation goes here]
11) When you reached the **COI Financial Submission & Attestation Page**, review the instructions and click the **Continue** button at the bottom of the page. You will be taken back to your COI disclosure page where you can submit your disclosure.

12) **IMPORTANT**: In order to submit your disclosure, you **must** click the **Submit Disclosure** button (located on the left column under **My Activities**). If you miss this step your disclosure will remain in pre-submission and incomplete. If there is no missing information found in your disclosure, you will receive the Attestation Statement.

13) Review the **Attestation** page and complete the following steps:
   
a) Enter the most recent date of your completed mandatory Financial Conflict of Interest (FCOI) training.
   
b) Review the RUSH COI policies.
   
c) Check the white box □ to confirm that you have read the policies indicated and that the disclosed information is correct.
   
d) Click **OK** at the bottom of the page. A confirmation will be sent to your email that your PSCOI disclosure was successfully submitted. **End**

**NOTE**: On the attestation page for **federally funded researchers**, you are required to provide the date of your last FCOI training.