

## FCOI Report Submission Instructions

### Applicability

Confirm that you are an investigator required to submit and FCOI report as part of the grant proposal submission or grant award. See the [FCOI webpage](#) for more information.

Provide the requested information in this eForm, relevant to your funding agency. If the funding agency requiring and FCOI reporting is not NSF or PHS, contact [compliance@cofc.edu](mailto:compliance@cofc.edu) to confirm if you should complete the NSF or PHS disclosure section of this eForm.

For the purposes of this disclosure report, **immediate family means your spouse and dependent children**. The financial interests that must be disclosed by the Investigator include the **aggregated amounts** or values of financial interests held by the Investigator and immediate family.

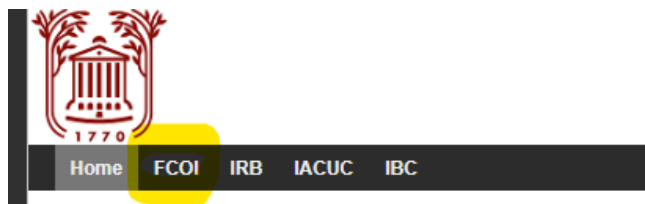
### FCOI Training

If the FCOI eForm submission is required by the NIH or another PHS agency, you must complete the [NIH Financial Conflict of Interest Training](#).

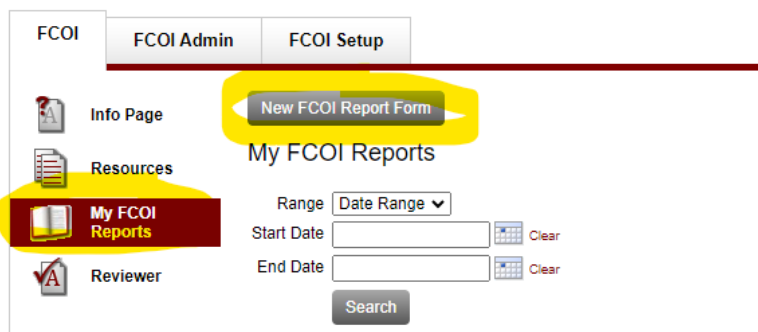
### Instructions for Completing the eForm

#### Step 1: Create a new FCOI Report

- Login in Sitero Mentor using your CofC username and password.  
<https://www.axiommentor.com/login/shibLogin.cfm?i=cofc>
  - Institution ID: cofc
  - Contact [compliance@cofc.edu](mailto:compliance@cofc.edu) if you cannot login.
- Press on "FCOI" from the top navigation bar



- Select "My FCOI Reports" from the left-hand navigation menu.
- Press the "New FCOI Report Form" button located at the top of the page.



**Step 2: Provide the information in the New FCOI Report window:**

- Provide the Form Type in the dropdown menu: Initial submission or an update.
- Provide the Report Type by selecting the type of submission and agency from the dropdown menu.
- You do not need to upload any documents on this screen; only if requested later in the eForm or by the compliance administrator.
- Press Save to continue.
- You can return to this screen by pressing the "Edit" button from the FCOI Report Form webpage.

**Step 3: Complete the required information on the FCOI Report Form webpage:**

- Press the "Add/Edit Answers" button above each section you would like to complete.
- When editing your answers, at the bottom of the window you can press:
  - "Save" to continue to the next set of questions,
  - "Save and Close" to save your response and return to the FCOI Report Form webpage,
  - "Skip Question" to go to the next batch of questions, and
  - "Cancel" to close the window and return to the FCOI Report Form webpage without saving any answers.
- Press submit at the bottom of the page when the eForm is completed and ready for review.

**Uploading Documents**

- If needed, you can upload files at any time by pressing the "Upload Docs" button at the top of the page.
- If you answer yes to any questions, you will need to upload a [Significant Financial Interest Disclosure Form](#) for each entity and/or family member with the financial interest.
- After reviewing the SFI Disclosure, you may be required to submit an FCOI Management Plan. You will be notified if it is needed from you.
- Other types of documentation may also be requested and uploaded as needed.