



# PERA COI/COC Module

## For Department and Unit Heads

### Disclosure Profile

- The Disclosure Profile is an annual certification, based on the university’s fiscal year (July 1 to June 30), completed by every employee covered by the Conflicts of Commitment and Reportable Outside Activities (III.B.1) policy.

<p>Employees with <b>no Reportable Outside Activities to disclose:</b></p> <ul style="list-style-type: none"><li>○ Complete the form in PERA indicating they do not have any reportable activities.</li><li>○ Step-by-step instructions are available here <a href="https://bit.ly/nocoicoc">bit.ly/nocoicoc</a></li></ul>	<p>Employees <b>with Reportable Outside Activities to disclose:</b></p> <ul style="list-style-type: none"><li>○ Complete the Disclosure form AND simultaneously submit a Pre-Approval Request for each activity they will participate in for the coming fiscal year.</li><li>○ Step-by-step instructions are available here <a href="https://bit.ly/coicocdisclosure">bit.ly/coicocdisclosure</a></li></ul>
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### Pre-Approval Requests

- A Pre-Approval Request is the actual request for an activity that would fall under a Reportable Outside Activity type (e.g. consulting or board service).
- The Pre-Approval Request should be submitted before the employee participates in the activity.
  - A Pre-Approval Request can be submitted at the time the employee updates their disclosure profile or submitted at any time they will begin participating in a new Reportable Outside Activity during the fiscal year.
- These requests must be reviewed and approved in PERA.

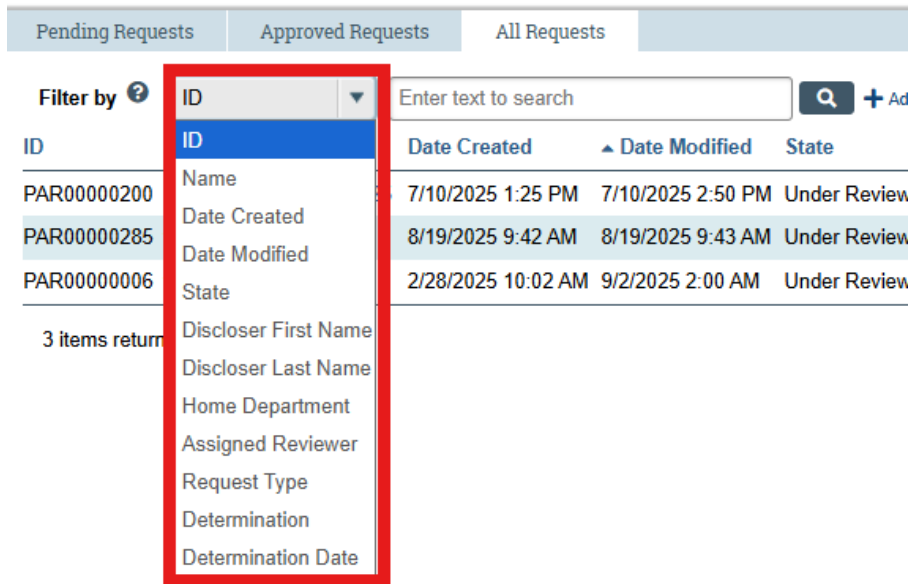
### Reviewing Reportable Outside Activity Disclosures

- All Pre-Approval Requests can be reassigned to another primary reviewer.
- This can be accomplished in just a few steps shown here [bit.ly/coicocassignreviewer](https://bit.ly/coicocassignreviewer)

### Request Clarifications

- If you have questions about a Pre-Approval Request, you can request clarifications from the submitter. The submitter will be notified to provide clarification.
- View the steps <https://bit.ly/coicoc-clarification>

## Search & Filter



The screenshot shows the PERA search and filter interface. At the top, there are tabs for 'Pending Requests', 'Approved Requests', and 'All Requests'. Below these is a 'Filter by' dropdown menu, which is currently open, showing a list of filterable fields: ID, Name, Date Created, Date Modified, State, Discloser First Name, Discloser Last Name, Home Department, Assigned Reviewer, Request Type, Determination, and Determination Date. To the right of the dropdown is a search bar with the placeholder text 'Enter text to search' and a search icon. Below the search bar is a table of requests. The table has columns for ID, Date Created, Date Modified, and State. The first three rows of the table are visible, showing request IDs PAR00000200, PAR00000285, and PAR00000006, along with their creation and modification dates and current state (Under Review).

ID	Date Created	Date Modified	State
PAR00000200	7/10/2025 1:25 PM	7/10/2025 2:50 PM	Under Review
PAR00000285	8/19/2025 9:42 AM	8/19/2025 9:43 AM	Under Review
PAR00000006	2/28/2025 10:02 AM	9/2/2025 2:00 AM	Under Review

- PERA offers various filters to quickly locate requests.
- You might find it helpful to search for requests by the submitter name or ID.
- Learn more [bit.ly/pera-find-search-data](https://bit.ly/pera-find-search-data)

## Manage Ancillary Review

- If you would like a specific office or person to review the request before making a recommendation or decision, you can create an Ancillary Review.
- This can be used to send the request to a person or Purdue organization, e.g., the ROA office, Research Security and Export Controls, your business office, Human Resources, etc.
- View the steps [bit.ly/coicocancillary](https://bit.ly/coicocancillary).

## Training & Support

- Assistance with PERA  
[perahelp@purdue.edu](mailto:perahelp@purdue.edu)
- Questions about Conflicts of Interest and Conflicts of Commitment  
[compliance@purdue.edu](mailto:compliance@purdue.edu)
- Click-by-click instruction guides and other support tools, including videos:  
[pera.research.purdue.edu/training/compliance/coi-coc/](https://pera.research.purdue.edu/training/compliance/coi-coc/)