

# Ancillary Review for Organizational Conflict of Interest Certification

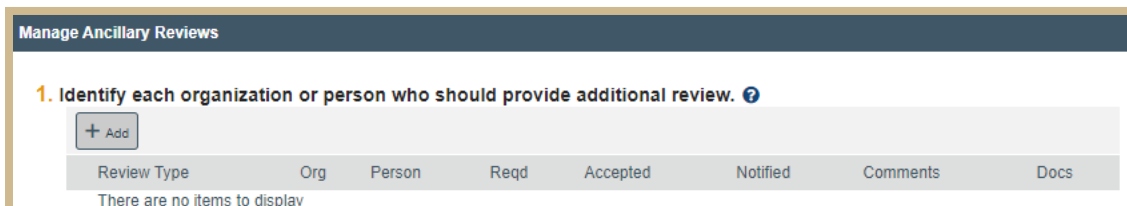
To ensure timely processing, requests for OCI Reviews should be submitted to the COI team at least five business days before the deadline for proposal submission to sponsor.

Organizational Conflict of Interest Certifications will be completed by Ancillary Review.

1. Select "Manage Ancillary Review" from the Funding Proposal Workspace.



2. Click Add on the Manage Ancillary Review pop-out screen.



3. Select the COI Organization.
4. From the review type drop-down, select OCI Review.
5. Select 'Yes' for Response Required if a response is needed prior to proposal submission.

6. In the Comments field provide:
  - a. If response is required in less than 5 days, include "URGENT" as the first word in the Comments section.
  - b. Include specific instructions in that include:
    - PI First and Last Name, Proposal Title.
    - Provide details about the type of OCI Review needed.
    - Verification of completion of FIS Disclosures.
    - Enter the date a response is required (calculate 5 days prior to sponsor due date).
7. Add the Certification Form (if applicable) to the Ancillary Review.
8. Complete Statement of Work, Budget and Budget Justification must be uploaded to the Add Attachments activity.

The screenshot shows a web form with the following sections:

- 2. \* Review type:** A dropdown menu with "OCI Review" selected.
- 3. \* Response required?** Radio buttons for "Yes" (selected) and "No", with a "Clear" link. A help icon (?) is visible to the right.
- 4. Comments:** A text area containing instructions: "Provide details about the type of OCI Review needed. Verification of completion of FIS Disclosures. Enter the date a response is required (calculate 5 days prior to sponsor due date). Add the Certification Form (if applicable) to the Ancillary Review. Complete Statement of Work, Budget and Budget Justification must be uploaded to the Add Attachments activity." A help icon (?) is to the right of the title.
- 5. Supporting documents:** A section with a "+ Add" button, a "Name" header, and a list item: "OCI Certification Form.pdf(0.01)" with a document icon and a three-dot menu icon to its right.

9. Select OK to Save and close the page.

10. On the Manage Ancillary Review page, verify the information is correct for the Ancillary Review and select OK. This will send an email notification to the individuals in the COI Organization and place this Funding Proposal in their inbox.

\*\*All individuals that are included in the COI Organization will receive a system generated email with information related to the Review request. The Funding Proposal will also appear in the Inbox on the individual Dashboard.

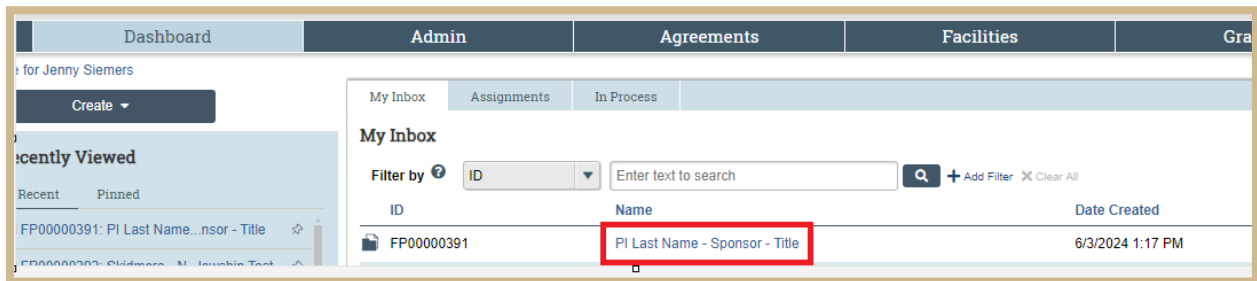
## How to Submit an OCI Ancillary Review

Follow the steps below to submit (approve/deny) an ancillary review:

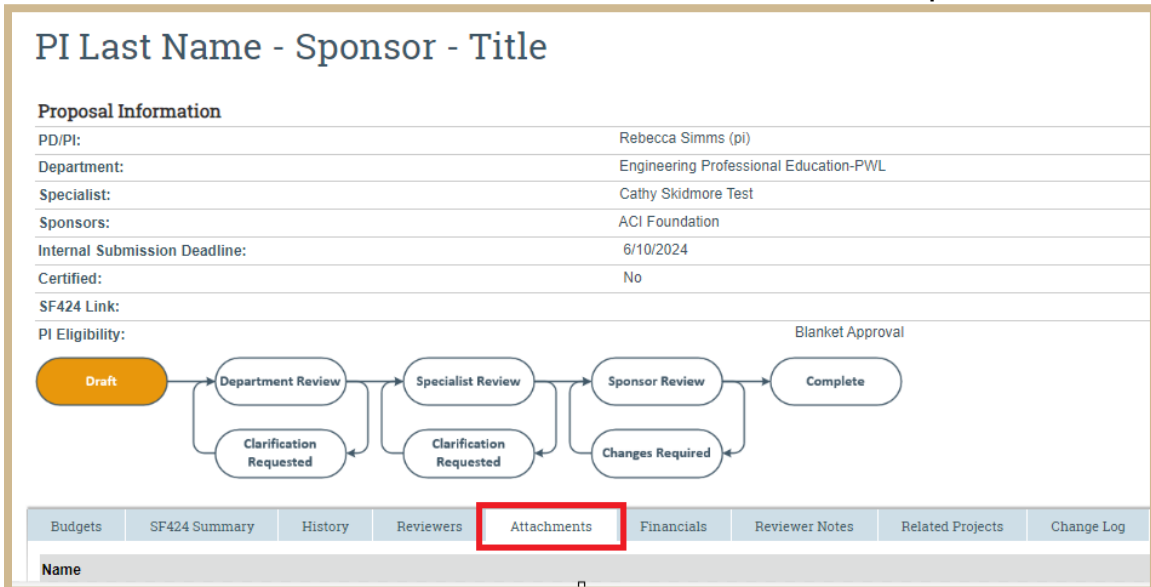
1. Access the record in one of two ways:
  - a. From the system generated message received via email, click on the "Grant ID" link. This link will direct you to the Funding Proposal Workspace of the proposal needing review.

<b>Link:</b>	<a href="#">FP00000391</a>
<b>PI:</b>	Rebecca Simms (pi)
<b>Title:</b>	PI Last Name - Sponsor - Title
<b>Required:</b>	Yes
<b>Description:</b>	A Funding Proposal has been assigned to you for ancillary review. Click the link above to access and review the submission.
<b>Comments:</b>	<p>URGENT</p> <p>If response is required in less than 5 days, include "URGENT" as the first word in the Comments section. Include specific instructions in that include: PI First and Last Name, Proposal Title, Funding Proposal Number. Provide details about the type of OCI Review needed. Verification of completion of FIS Disclosures. Enter the date a response is required (calculate 5 days prior to sponsor due date).</p> <p>Add the Certification Form (if applicable) to the Ancillary Review.</p> <p>Complete Statement of Work, Budget and Budget Justification must be uploaded to the Add Attachments activity.</p>
<b>Supporting Documents:</b>	<a href="#">OCI Certification Form.pdf</a>

- b. Select the name of the proposal provided on the My Inbox or My Reviews tab.

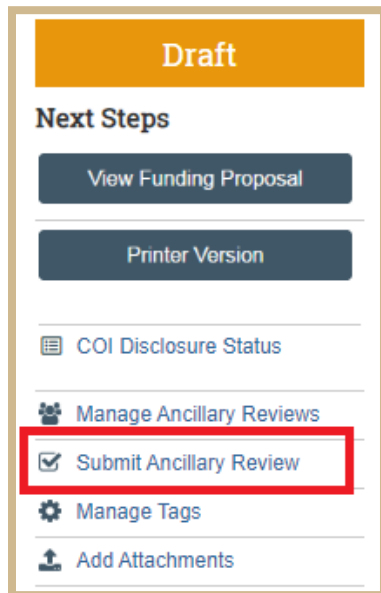


2. On the Proposal Workspace, select the Attachments tab to View the RFP and Statement of Work. The RFP and SOW file will be uploaded.



3. If clarification is required email the Pre-Award Specialist and/or Project Director to resolve.
4. If a form requires signature, download the form from the email, complete and sign the form.

5. To approve the Ancillary Review, from the Activity List, select Submit Ancillary Review.



6. A new page will open.
  - a. From this new page, select the Ancillary Review to be submitted.
  - b. Select Yes/No for questions 2 and 3.
  - c. Add Comments and Supporting Documents if applicable.
    - i. If a form required signature, attach it here.
    - ii.

NOTE: Documents uploaded to the Ancillary Review approval/denial become a permanent document in the Funding Proposal.

- d. Select OK, the Ancillary Review is complete.

## Submit Ancillary Review

Unless you have permission to access the project, upon submitting your review, you will lose access to this project and be returned to your Inbox.

### 1. Select the Review you are submitting:

Organization	Person	Review Type	Required
<input type="checkbox"/>	Jenny Siemers Test	Export Controls	yes
<input type="checkbox"/>	Jenny Siemers Test	PI/Co-PI Certification	yes
<input type="checkbox"/>	Jenny Siemers Test	OCI Review	yes
<input type="checkbox"/>	Jenny Siemers Test	FCOI Costing Review	yes

### 2. \* Do you accept this submission?

Yes  No [Clear](#)

### 3. \* Is the ancillary review complete?

Yes  No [Clear](#)

### 4. Comments:

### 5. Supporting documents:

[+ Add](#)

Name

There are no items to display

OK

Cancel