eCOI Interest Inventory Manual

This guide serves to aid in creating and submitting the conflict of interest inventory.

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Welcome to *ARC*

Our on-line *ARC* system streamlines the process of submitting, approving, tracking, and managing eIRB eCOI, and eIACUC applications.

ARC is available via Internet connection 24 hours a day, 7 days a week.

If you have any questions about the ARC system, the *ARC* Help Desk is available during regular business hours at (813) 974-2880 and by email at RSCH-arc@usf.edu.

What is an Interest Inventory?

Effective August 24, 2012, all investigators who are funded by or anticipate funding by PHS and Certain Federal Agencies, Foundations or Extramural Sponsors are required to complete a new COI Interest Inventory. The interest inventory application guides you through required training then through the process of disclosure of applicable interests and their relationship to your institutional responsibilities. Only one interest inventory application can be submitted per ARC account.

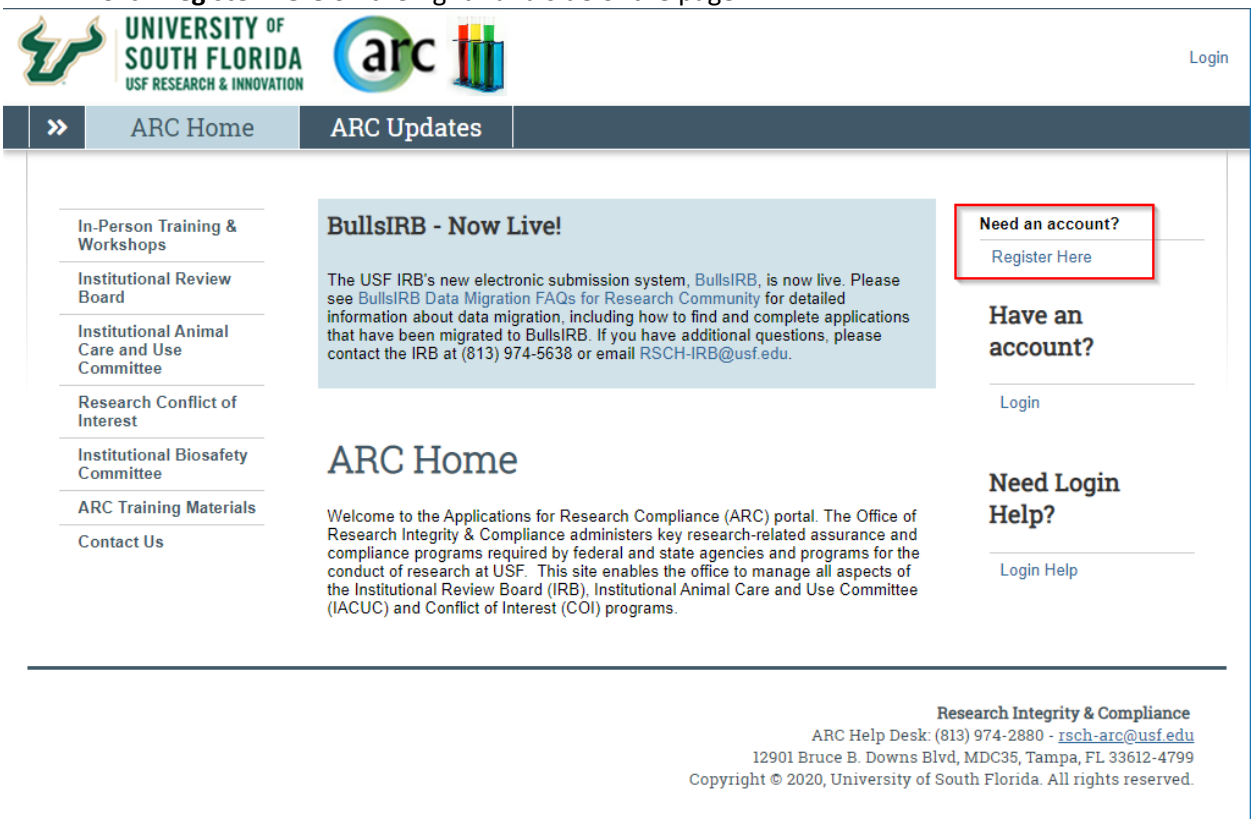
Accounts

In order to create and submit applications in ARC, you will first need to obtain an account by submitting a new user registration request.

New Account Registration

To open your new *ARC* account:

1. Go to the *ARC* Web Site: https://ARC.research.usf.edu/prod/
2. Click **Register Here** on the right hand side of the page.

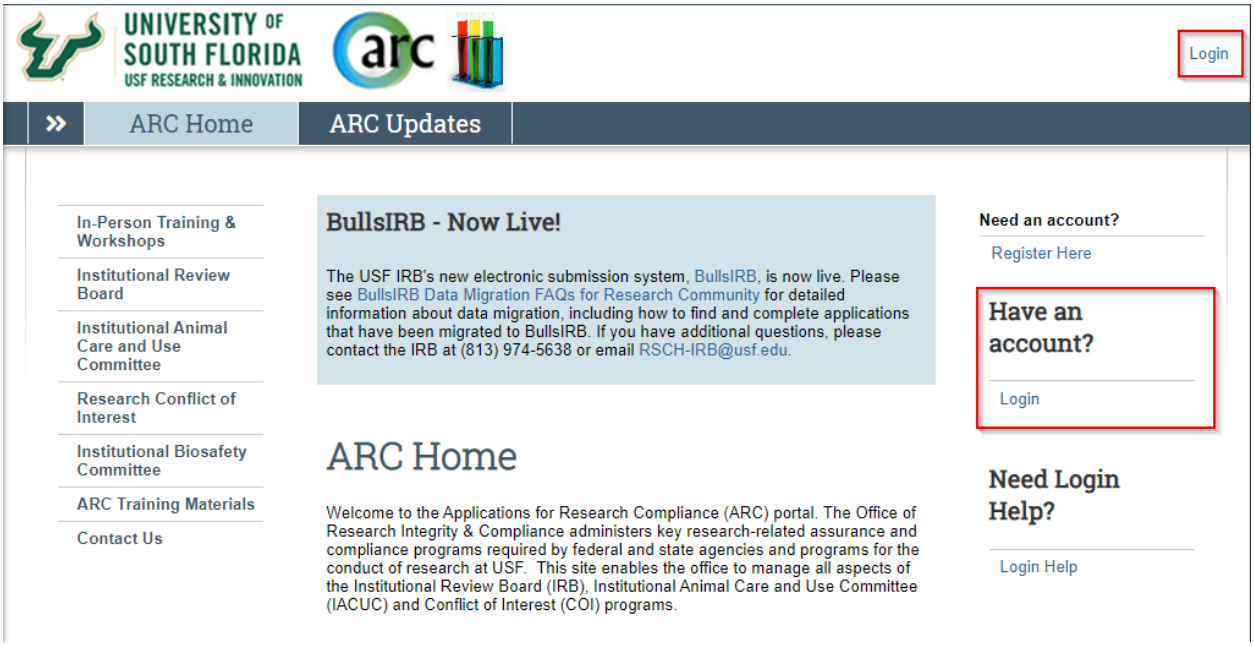


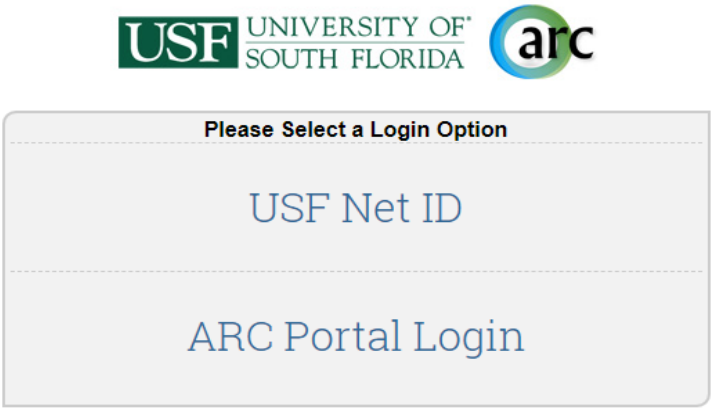
3. Complete the required fields (*) and provide your USF Net ID, Employee ID, and USF or affiliate email address.
4. Select all relevant roles, such as Study Staff, PI, Department Approver, etc.
5. Click **Register.**

6. Within two business days your new account will be activated and you will receive an e-mail containing your account information (i.e., User Name & Temporary Password).

Log In

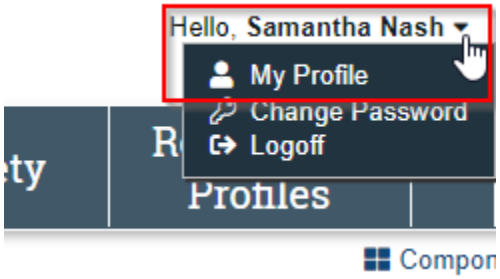
1. Select Login from homepage.
2. Select between USF Net ID (as a USF user) or ARC Portal Login (for all other users)
3. Type your **User Name** in the login section on the right side of the *ARC* screen.
4. Type in your **Password.**
5. Click **Log In**.





Account Changes

It is important to keep your account information current. To make changes to your account, click your name in the upper right hand corner of your screen to open your account properties.



Then make the necessary changes and click **OK**.

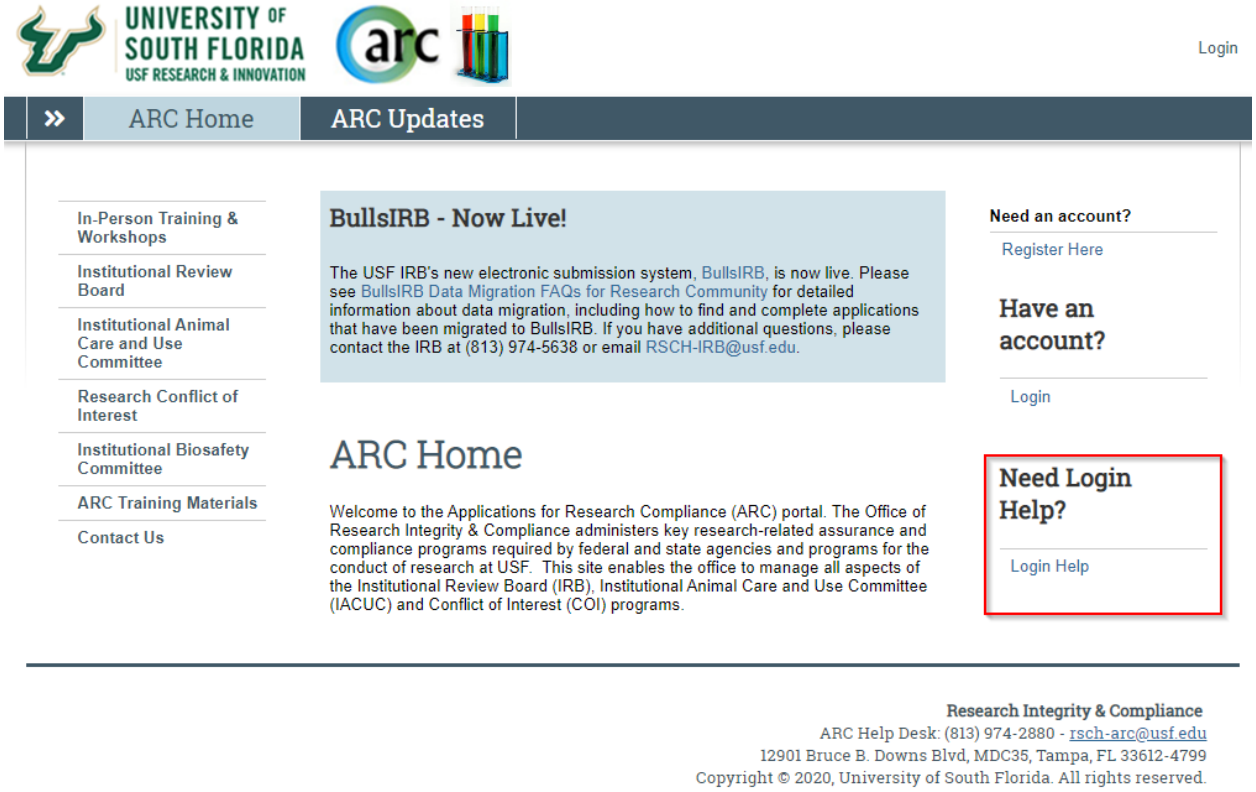
To change your password, click on your name (as described above). On your Account page, click the **Account** tab. Type in your old password, your new password, and your new password again in their respective boxes. Click **OK**.

After receiving your username and a temporary password, you can log in to the ARC system.

Forgot Your User Name or Password?

If you ever forget your account credentials, you can have them emailed to you on the ARC Home page.

1. Select Login from homepage.
2. Select ARC Portal Login.
3. The **Forgot Password** and **Forgot User Name** options are available.



1. If you select **Forgot user name?**, you will be prompted to confirm your email address. Once confirmed, your user name will be emailed to you.
2. If you select **Forgot password?**, you will be prompted to confirm your user name and email address. Once confirmed, a new temporary password will be emailed to you. Upon log in, you will be required to change your password.

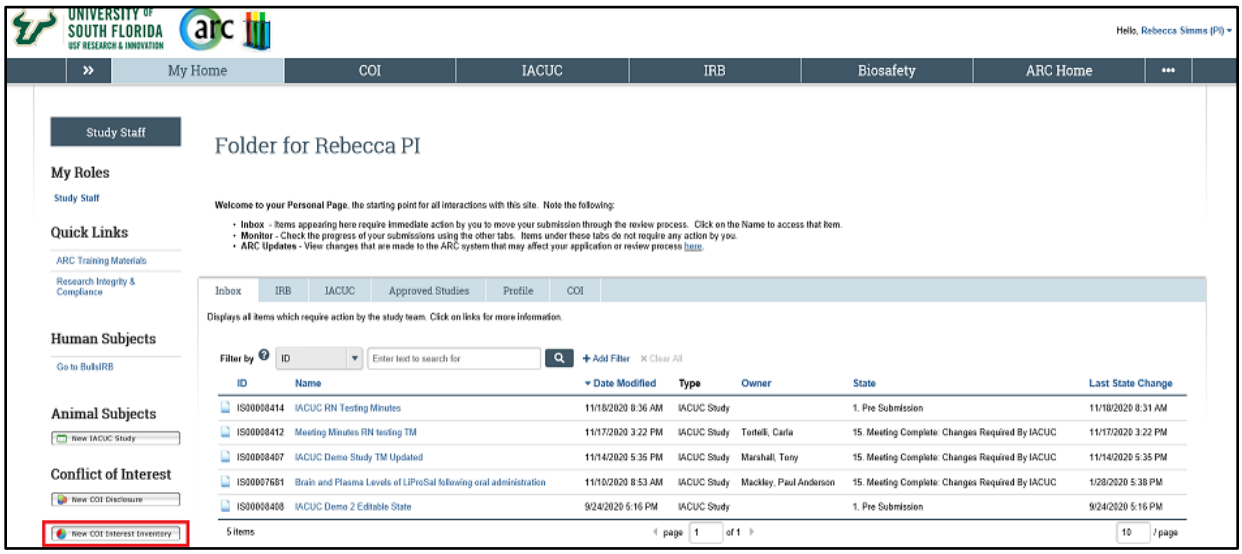
If you have forgotten both your user name and your password, select **Forgot user name?** first as it only requires your primary email address. After receiving your username, you can select **Forgot password?**.

Conflict of Interest Inventory

All investigators who are funded by or anticipate funding by PHS and Certain Federal Agencies, Foundations or Extramural Sponsors are required to complete an Interest Inventory. Only one interest inventory can be created per ARC account.

Creating the Interest Inventory

To complete your COI Interest Inventory, log into ARC at https://arc.research.usf.edu/Prod. You will be on your "Home Page." To create an Interest Inventory, select **New COI Interest Inventory** which can be found under the "Create" heading on the left hand side of the page.



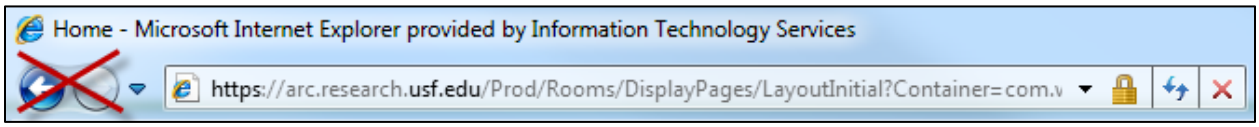
This will bring you to the interest inventory **SmartForm**.

Working with Smart Forms

All applications in *ARC* use SmartForms which present only those questions that are relevant to your application. It is important that you respond to each question displayed on the SmartForms. Required fields are marked with a red asterisk *.

You can answer text questions by typing directly into the text box or by pasting in text from other documents. **Add** function allows you to attach relevant documents or select your answer from a pre-populated list depending on the question.

Use the left side Navigational pane to navigate through the SmartForm instead of the controls in the browser bar (e.g., Internet Explorer, Firefox, Chrome, Safari, Opera).



Save your application by clicking **Save** or **Continue**.

> **WARNING:** The **Back** button does not save changes. After you enter or edit data on a screen, click **Save** before going **Back**!

Use **Exit** to close the application and return to that application's Workspace.

> **WARNING:** Always **Save** before exiting!

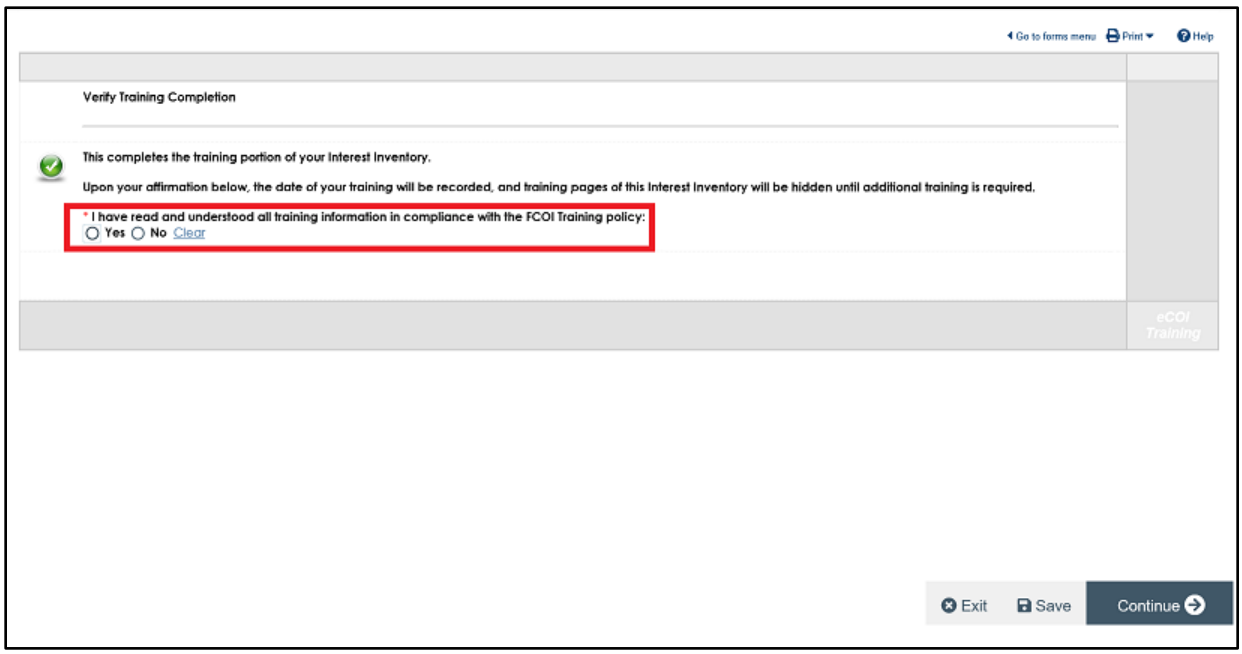
Each section and question is numbered for easy navigation and reference. Numbering is consistent through all SmartForm applications; however, remember that only the relevant questions for each specific application are displayed.

Once new or revised data on a page has been saved, you can navigate directly to other sections and questions by using the **Jump To** drop-down menu. The title of the displayed page will be red. Items not relevant to this application will appear gray in the Jump To menu.

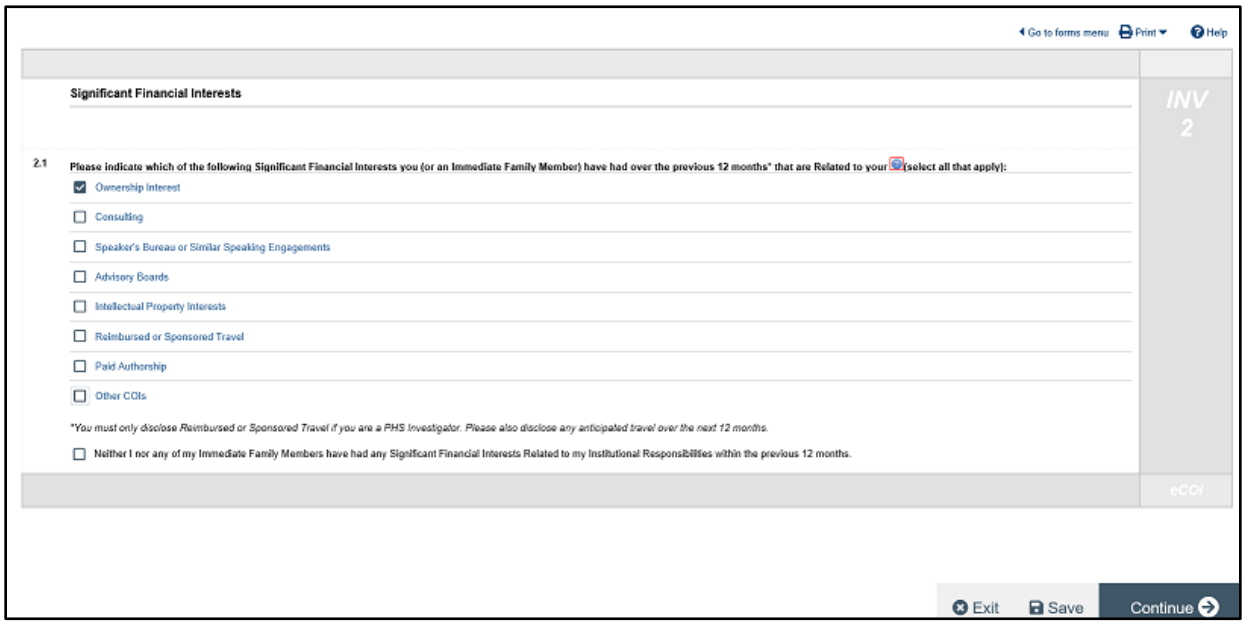
> **WARNING:** After you enter or edit data on a screen, click **Save** before using **Jump To**! The Jump To menu does not save.

Completing the eCOI Interest Inventory

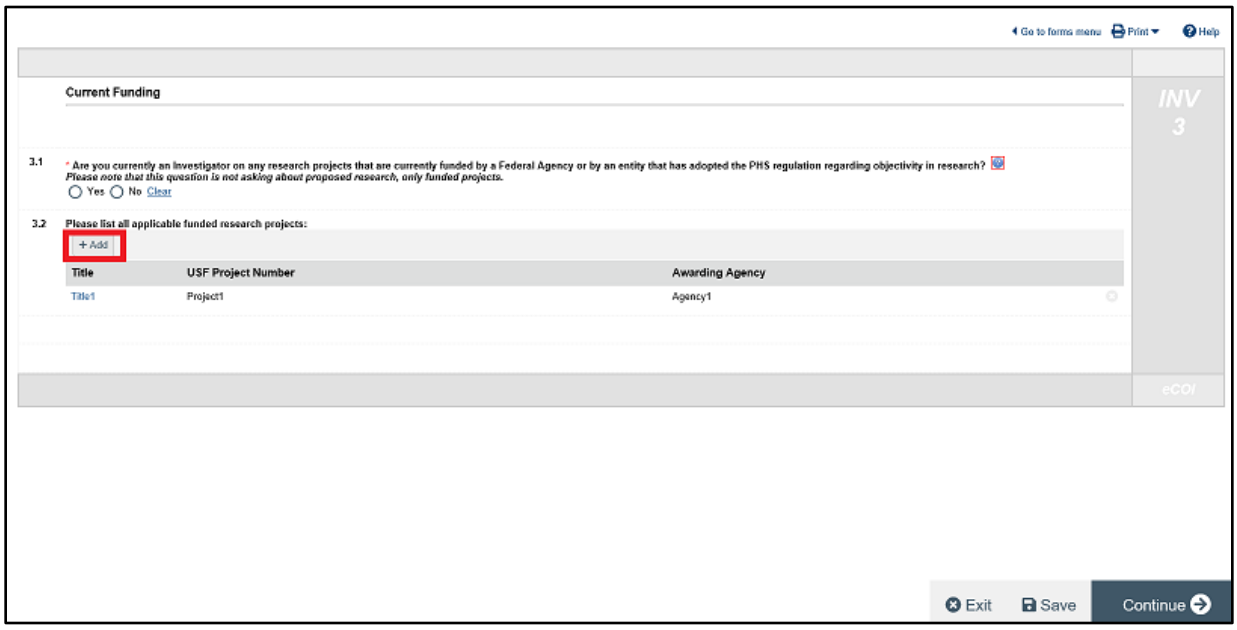
The Interest inventory begins with a training section which explains disclosure requirements, significant financial interests, and reporting requirements. Once you have progressed through the training pages, you will need to verify completion of the training by answering the affirmation statement in the Smartform.



After the training portion, you are routed to the section on Significant Financial Interests. Select the type(s) of interest that apply. Based upon your answers, you will be routed to additional pages to detail these interests.



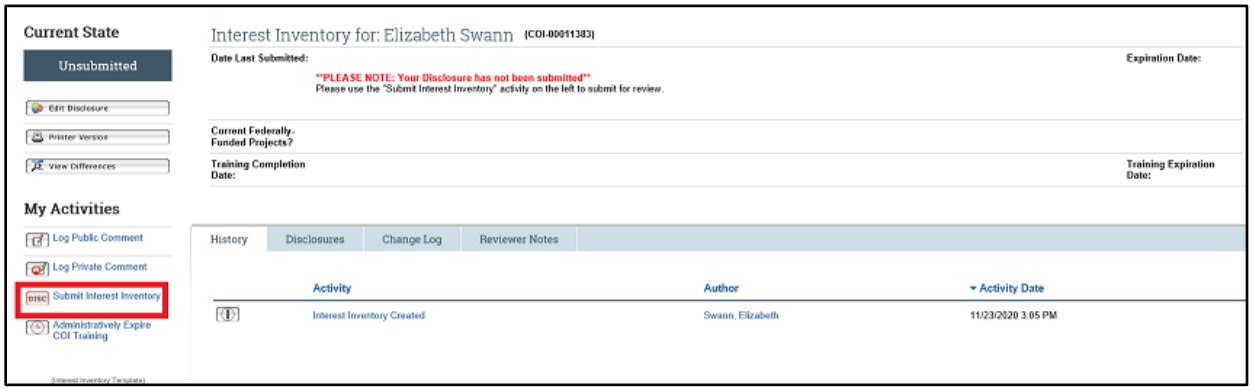
Once your interests have been added, questions are presented regarding current PHS funding. List all PHS-Funded research projects by selecting **Add**. Please include the project title, number, and PHS Awarding Agency.



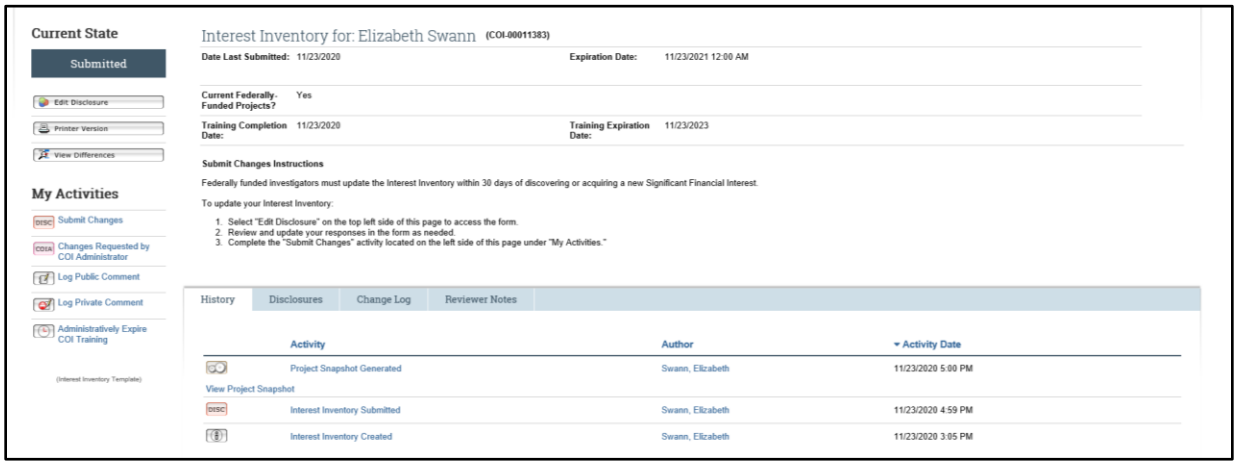
Once you have completed the Interest Inventory SmarForm, save your progress and select “Exit” or “Finish” if you are on the last page of the SmartForm. This will bring you to the application’s workspace where you can submit it for review.

Submitting the Interest Inventory

After completing the Interest Inventory SmartForm, you can submit it for review by selecting the **Submit Interest Inventory** activity on the application's workspace.



Once you have submitted the Interest Inventory, the state will change to "Submitted." The workspace will also display your training completion and expiration dates and your Interest Inventory's expiration date.



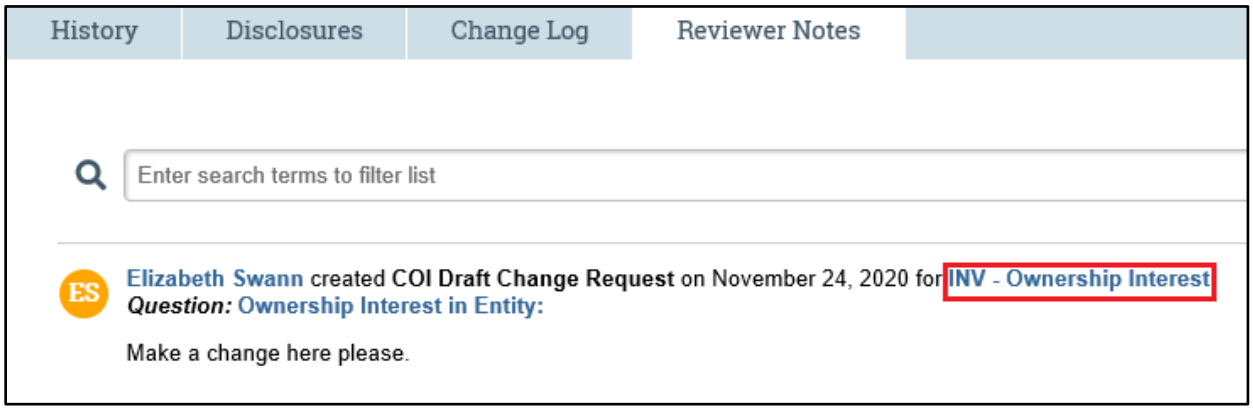
Post-Submission

After submitting your interest inventory, it will no longer display in your Inbox. Instead, it will be listed under the **COI** tab of your home page.

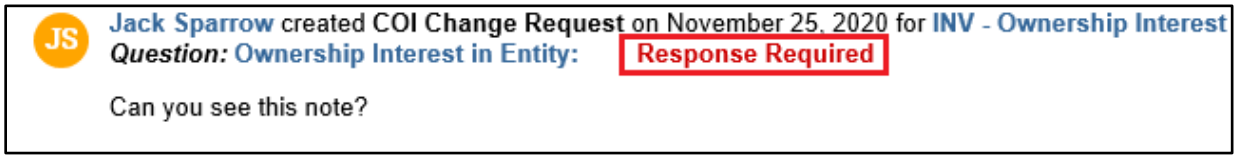
Responding to Requested Revisions

A COI administrator can request revisions or additional information after reviewing your application. When revisions are requested, the application will return to your Inbox. To access the application:

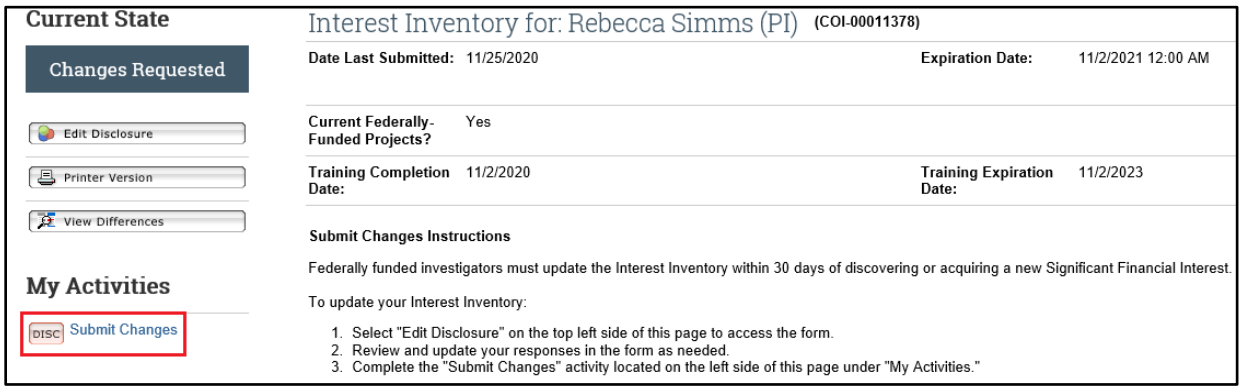
1. Click the application Name in your ARC **Inbox** to open the application workspace.
2. Under the **Reviewer Notes** tab, you will find all notes that have been added. Each note provides a **Jump To** link that will take you to the page where the requested change needs to be made.



3. Respond to each change requested. Some changes may require changing your answer to a question in the SmartForm in addition to answering the note.



4. Be sure to **Save** before you **Exit** the SmartForm.
5. When you have completed all of the requests in the application workspace, you will need to submit the requested revisions via the **Submit Changes** activity.



After you have submitted your response, the application will no longer be displayed in your Inbox, but will still be listed under the **COI** tab on your home page.

Updating your Interest Inventory

Your Interest Inventory can be updated at any time. To update your interest inventory, select **Edit Disclosure** (**1**) to navigate to the SmartForm. Make any required changes, save, and exit to the application's workspace. Select the **Submit Changes** (**2**) activity to file your changes. COI administrators will be notified that changes have been made to your interest inventory.

Annual Review

Your interest inventory must be reviewed on an annual basis. As the expiration date approaches, you will receive email notifications from the ARC system. Once you have received a notice, login to the ARC system and navigate to your interest inventory in the **COI** tab. The **Certify Annual Review** activity will be available to confirm that you have reviewed your interest inventory and that the information provided is accurate. After reviewing your interest inventory, select this activity to complete your renewal.