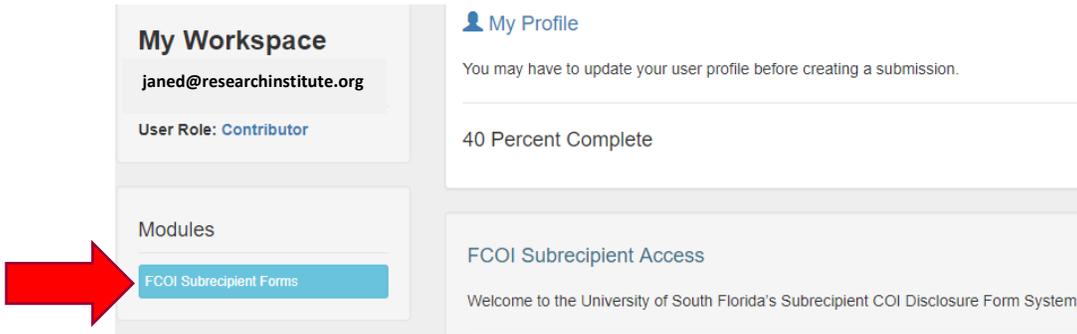
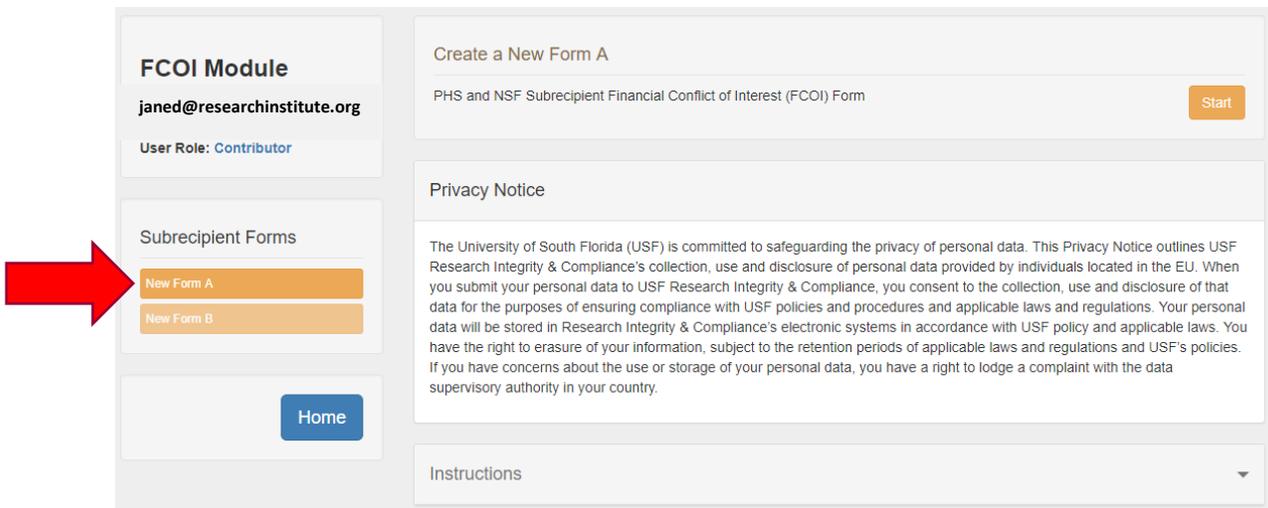


## Quick Guide to Subrecipient Forms A/B

1. Go to the [USF Research Portal](#) and sign in or register.
2. Click “FCOI Subrecipient Forms” on the left side of the screen.



3. If you are an **Authorized Official** or a **subrecipient Investigator** or a **Consultant**, complete your User Profile (if you have not done so already), then start a Form A by selecting “New Form A” on the left side of the FCOI Module home screen. Navigate through Form A using the “Next” button on the bottom right. Please note that the form will not allow you to proceed to the next page until all required fields (indicated by a red asterisk) are filled on the present page.



**Note for consultants:** If you are a consultant acting in an individual capacity and you are not working on this project as part of your institutional responsibilities, then you must list yourself as the organization on Form A and complete Form B, as well.

4. If your institution does not have a PHS- or NSF-compliant COI policy, any Investigators listed on Form A will need to complete a Form B disclosure. If you are an **Investigator**, you will receive an email from USF Compliance with a link to register/sign in and complete a Form B. Once signed in, click “FCOI Subrecipient Forms” on the left side of the screen (as shown in step #1). After completing your User Profile, click the blue box under “Form B” in the Review and Edit Forms section at the bottom of the FCOI Module home page.

Review and Edit Forms

Search

Submission	Organization	Date	Form A	Form B	
+ Doe, Jane	Research Institute	2018-07-31		 0%	<input type="radio"/>



- On the next page, complete the University of South Florida’s Financial Conflict of Interest Training (if you have not done so already) and then click “Start”.

Subrecipient and Consultant COI Disclosure - Form B

Form ID: 100000899

USF PI: Smith

Create a New Form B

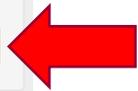
**Welcome to the University of South Florida’s Subrecipient and Consultant COI Disclosure Form system.**

Before starting Form B, please complete the University of South Florida’s Financial Conflict of Interest Training [here](#). You will be asked to certify that you have completed the training in the disclosure form.

**Click the orange “Start” button below to access Form B.**

If you need assistance, please contact the USF Conflict of Interest Program at [coi-research@usf.edu](mailto:coi-research@usf.edu) or 813-974-5638.

Federal regulations require that you notify the USF COI Program within 30 days of discovering or acquiring a new Significant Financial Interest. To do so, email the COI Program at [coi-research@usf.edu](mailto:coi-research@usf.edu).



- On the next page, click the blue box under the pencil icon to start your Form B disclosure.

Subrecipient FCOI - Form B

Individuals working on this project who are responsible for design, conduct, or reporting of the research.

Name	Type		
Doe, Jane <small>(janed@researchinstitute.org)</small>	Investigator	0%	



**To complete your Form B, click on the edit icon  next to your name.**

7. Navigate through Form B using the “Next” button on the bottom right. Please note that the form will not allow you to proceed to the next page until all required fields are filled on the present page. Once you have completed and submitted the form, you will be brought to the FCOI Module home page and see your Form B 100% complete in the Review and Edit Forms section.

Review and Edit Forms					
					Search 
Submission	Organization	Date	Form A	Form B	
+ Doe, Jane	Research Institute	2018-07-31		 100%	✓