UT RESEARCH MANAGEMENT SUITE

COI Module Frequently Asked Questions

For Department Heads

In UTRMS, users may be designated as the COI Reviewer for a Department; this role is associated with special permissions in the COI module. Read on for more details.

1. What special permissions do COI Departmental Reviewers have?

- View access to all disclosure profiles for everyone with a primary appointment in that department.
- View access to all pre-approval requests submitted by everyone with a primary appointment in that department.
- Default reviewer for any ancillary reviews requested by the COI office which pertain to disclosures or pre-approval requests in that department.

Read below for guidance on how to access this information.

2. Who has been assigned as the COI Departmental Review for my department?

The Department Chair is generally the COI Reviewer for the department. As part of COI go-live, many (but not all) Department Chairs were pre-populated into this role.

To determine whether a COI Departmental Reviewer has been assigned for your department or college/school, follow these steps:

Log in UTRMS-COI

Click *COI* on the dark blue ribbon to navigate to the COI module

Click *Reports* on the light blue ribbon

Click *Custom Reports*

Click *Users with COI Dept. Reviewer Role*

The table includes all departments where a COI Department Reviewer has been assigned and includes names/titles of assigned reviewers.

3. Can someone other than the department chair be assigned as the Departmental Reviewer?

If your department COI reviewer is someone other than the Department Chair, please submit a UTRMS support ticket, select "UTRMS" as the request type and "Request additional user roles in the system" to have the role appropriately assigned. The COI office will review and approve the request before the assignment is made.

More than 1 person may be designated as the COI Departmental Reviewer, but keep in mind that all assignees will receive a notification when an ancillary review is requested from the COI office.

4. **How do I change/update the COI Departmental Reviewer for my department?**

   It is important that the assigned COI Departmental Reviewer is kept up-to-date. If not, this can cause delays in COI review for your faculty and staff.

   You should submit a UTRMS support ticket (selecting "UTRMS" as the request type and "Request additional user roles in the system") when a change in Chair has occurred, or to request a new or additional Department Reviewer be added to the system. Indicate if you are replacing an existing person or if you'd like to be added in addition to the current person. The COI office must approve the change before assignment can be made.

5. **What if I need access to more than one department?**

   You will need to request this for each department that you oversee, the role cannot be granted at the college level.

6. **How do I view/access the disclosures made within my department?**

   Log in UTRMS-COI

   Click *COI* on the dark blue ribbon at the top of the page to navigate to the COI module

   Click *Disclosures* on the light blue ribbon

   A list of all disclosure profiles within your department will display.

7. **How do I view/access the pre-approval requests made within my department?**

   Log in UTRMS-COI

   Click *COI* on the dark blue ribbon at the top of the page to navigate to the COI module

   Click *Requests* on the light blue ribbon

   A table with all Pre-Approval Requests made within your department will display.

   Alternatively, to create a report of Pre-Approval Requests:

   Click *Reports* on the light blue ribbon at the top of the page

   Click the *Custom Reports* tab

   Select *Supervisor Pre-Approval Requests*

   You have the option to *Export to CSV* in the top right corner.

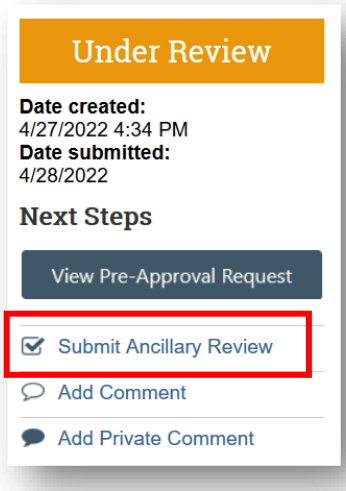
8. How do I respond to ancillary review requests from the COI office?

If you are assigned to perform an ancillary review, you will receive an email notification to your UT EID email. The request will also appear in your Dashboard, *My Inbox*. Follow these steps to submit your response:

1. Open the record to be reviewed by clicking on the hyperlink in the email notification or via the link in your UTRMS Inbox. (You must log in with EID/Duo Authentication.)

2. Review the information contained in the Request by clicking on View Pre-Approval Request on the left navigation pane. Once you have completed your review, exit the request form to return to the workspace.

3. From the workspace, click on the Submit Ancillary Review on the left navigation pane.



4. On the Submit Ancillary Review form:

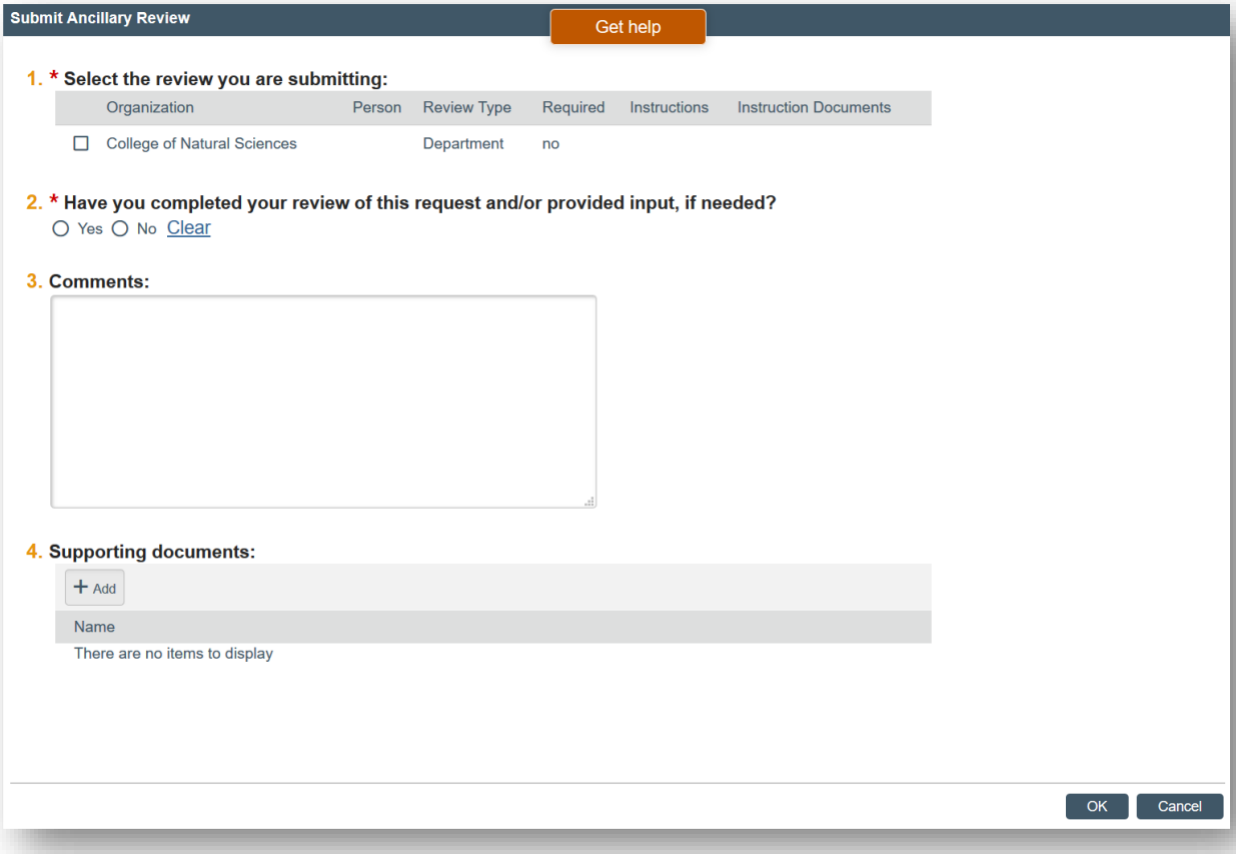
   Q1: Check the box beside your name/department.

   Q2: Select Yes to approve this activity or No to deny it.

   Q3: If you chose No in Q2, add a comment on why it was rejected.

   If you chose Yes in Q2, comments are optional.

   Q4: Add supporting documents as needed.



   Click OK at the bottom of the page.

   The COI office can now proceed with making a determination. If further clarifications are necessary for the COI reviewer, a subsequent Ancillary Review may be created.

5. Log out.