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**Introduction**

The information requested on the Financial Conflict of Interest (FCOI) forms meets the conflict of interest disclosure requirements under Public Health Service (PHS) regulations (42 CFR Part 50 and 45 CFR Part 94), NSF requirements (2 CFR Part 200 and PAPPG Chapter IX.A), the policies and requirements of other California state and federal agencies, and university policy. All key personnel on grant application or award must complete the FCOI forms on behalf of themselves and their spouse/domestic partner and/or dependent children.

In addition to the FCOI Disclosure form, you may be required to submit either or both of these forms:

- The **FCOI Addendum**: You will be required to complete the Addendum if you have acknowledged having a financial interest when completing a financial interest disclosure statement.
- The **FCOI Additional Sheet**: You will be required to complete the Additional Sheet if you have declared having a financial interest in more than one entity.

For any issues regarding DocuSign mechanics or routing, please contact Patricia Rodriguez. For questions about financial conflicts of interest in research, please contact Jessica Trask.

**FCOI Disclosure Form**

This form must be completed and routed via DocuSign.

**Locating the Form**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Navigate to the Office of Research Forms webpage</td>
</tr>
<tr>
<td></td>
<td><a href="https://www.sjsu.edu/research/resources/forms.php">https://www.sjsu.edu/research/resources/forms.php</a></td>
</tr>
<tr>
<td>2.</td>
<td>Click on the FCOI Disclosure [DocuSign] link. The link to the form may also be provided to you by your Research Foundation Proposal Development Specialist.</td>
</tr>
</tbody>
</table>

**Forms**

**Conflict of Interest**

- [FCOI Addendum](https://www.sjsu.edu/research/resources/forms.php)
- [FCOI Additional Sheet](https://www.sjsu.edu/research/resources/forms.php)
- [FCOI Disclosure](https://www.sjsu.edu/research/resources/forms.php)

**Completing the Form**

1. Click **USE**
2. Click **USE**

3. Type your name and email address in the Investigator box. The other recipients are preset and may not be modified.

4. Click **SEND**

5. You can select to **SIGN NOW** or **SIGN LATER**. If you select the latter, check your email inbox for a link that will allow you to access the form later.

6. If you elect **SIGN NOW** and need to upload an FCOI addendum and/or an additional sheet as you are completing the disclosure, enter your information and select **Finish Later** under **OTHER ACTIONS** in the upper right-hand corner of your screen. The data you entered will be saved.
7. To access your unfinished form at a later time, you can either click on the original link you received via email OR you can log in to DocuSign via one.SJSU. If the latter, click on Action Required to access your form and click SIGN to continue the process.

8. Once you have completed the form in its entirety and uploaded all required attachments, click FINISH. The form will be routed to the appropriate parties and you will receive a copy once complete.

FCOI Addendum and Additional Sheet

These forms must be completed and routed via DocuSign.

Locating the Addendum and Additional Sheet

1. Navigate to the Office of Research Forms webpage
2. Click on the FCOI Addendum [DocuSign] link or the FCOI Additional Sheet [DocuSign] link

Completing the Addendum and Additional Sheet

1. Follow the same instructions as for the FCOI Disclosure form above (Steps 1 through 7).
2. After you hit FINISH, you will receive an email with your completed form attached.
3. Download the form and any associated attachment to your computer.

4. Return to your unfinished FCOI Disclosure form following Step 7 above.

5. Upload your addendum/additional sheet/associated attachment in the appropriate location using the Upload icon.