Wake Forest®
Baptist Medical Center

eCOI
Electronic Request Process for Outside Employment and Non-Certified Industry Funded Educational Activities

User Guide
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### Introduction

Policy requires that all faculty, staff, and network physicians seek prior approval from their appropriate Chair, Section Head, Director, VP, etc. for any outside activity funded by Industry Vendors. ECOI is a web-based, electronic system developed at Wake Forest Baptist Medical Center and customized to facilitate this process. Faculty, staff, and network physicians not only submit their annual disclosures via eCOI, but they can also use the system to request prior approval for:

- Outside employment opportunities (outside employment generally requires a personal consulting agreement from the Industry Vendor)
- Non-certified educational activities, such as:
  - Attending an industry-funded educational event
  - Organizing an industry-funded educational event
  - Speaking at an industry-funded educational event
  - Travel to view capital equipment funded by industry

ECOI electronically routes Outside Activity requests to the appropriate individual(s) for approval and notifies individuals once the required approvals have been obtained.

*Please note that this electronic preapproval process is a policy compliance requirement. It does not replace any institutional requirements for travel and reimbursable expenses submitted via Concur.*
Logging In

The eCOI website can be accessed by any computer with internet connectivity at: http://coi.wakehealth.edu

Enter your medical center ID and password in the pop-up box.

Once logged into the system, select “My Inbox” at the top left of your screen.
You must choose the appropriate role before you can access the outside activity forms. Select “Outside Activities Inbox” on the left side of the page.

Select “Outside Activity Request” to initiate the electronic request process.
Use the “Back” and “Continue” buttons to navigate through the electronic form. Click the “Save” button on the banner before navigating back or exiting the system prior to submission of the form. Otherwise, you could lose information you have already entered.

All questions marked with a red asterisk are required. Blue help bubbles are distributed throughout the electronic module to provide more detailed information and instructions directly related to the individual questions.
Click the blue bubble again to remove the purple help field.

The electronic system branches questions based on your answers. To enter a date, click the small calendar icon. You can then select the correct date from the calendar to populate the form.
Dropdown lists automatically appear for you to select an individual’s name

Electronic submission of your Outside Activity request is a two-step process. You must select both “Ready to Submit” and “Finish”, as indicated by the arrows below.
An Outside Activity request that has NOT been submitted remains in Draft status and cannot be approved.
Approving Outside Activity Requests

Approval of electronic Outside Activity requests is required by the individual requesting the activity (if different from the individual submitting the electronic form), the Department (e.g. Section head, Department Chair, Director, etc.), and the COI Office. If your electronic approval and signature are required, an email notification will be sent to you with a link to eCOI. Log into the system and go to your inbox.

Select “Outside Activities” under “My Roles”
“My Inbox” has two sections. The top section contains Outside Activity requests which require your review and approval. Select the Outside Activity request you wish to review.

The outside activity information is summarized into a table format, and any uploaded documents are saved below the table for your review.
If you need to view the outside activity request form in its entirety, select “Printer Version.”

If you are the Requestor and approve of the Outside Activity request, select “Approve Activity,” answer any questions that follow, and select “OK.”
If you are the Departmental approver, select “Departmental Approver Review”

A pop-up window will appear. Answer the question and select “OK” to submit.
If you are the Department Chair and are reviewing an activity request for **outside employment**, all previously approved Outside Employment requests for this faculty member can be found at the bottom of the summary page under “Active Outside Employment.”

<table>
<thead>
<tr>
<th>Entity</th>
<th>Days</th>
<th>Annual Income</th>
<th>Projected Start Date</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>Eli Lilly and Company</td>
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<td>9000</td>
<td>3/2021</td>
<td>Approved</td>
</tr>
<tr>
<td>Smith and Wesson Management</td>
<td>1</td>
<td>9000</td>
<td>3/10/2021</td>
<td>Approved</td>
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</table>
You can sort the list of previously approved Outside Employment requests by clicking on any of the blue headers or by using the filter option.

If applicable, you can display more than ten active Outside Employment requests on one page by changing the number at the bottom to a larger number (e.g. 100)
"My Inbox" has two sections. The bottom section contains the Outside Employment requests you have previously completed for all your faculty/staff.

You can sort previously completed Outside Employment requests by clicking on any of the blue headers or by using the filter option.
If applicable, you can display more than ten active Outside Employment requests on one page by changing the number at the bottom to a larger number (e.g. 100)

### Reviews Previously Completed

<table>
<thead>
<tr>
<th>Faculty.First Name</th>
<th>Faculty.Last Name</th>
<th>Vendors</th>
<th>Days Annually</th>
<th>Annual Income</th>
<th>Projected Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tony</td>
<td>Stark</td>
<td>Covis Pharmaceuticals</td>
<td>12</td>
<td>24000</td>
<td>6/1/2021</td>
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<tr>
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<td>Astellas Pharma Inc.</td>
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<td>7000</td>
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<tr>
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<td>Kent</td>
<td>GlaxoSmithKline</td>
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<td>9000</td>
<td>4/1/2021</td>
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<tr>
<td>Tony</td>
<td>Stark</td>
<td>Smith and Nephew Wound Management</td>
<td>3</td>
<td>9000</td>
<td>3/31/2021</td>
</tr>
<tr>
<td>Peter</td>
<td>Parker</td>
<td>Pfizer, Inc.</td>
<td>4</td>
<td>24000</td>
<td>3/15/2021</td>
</tr>
<tr>
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<td>Eli Lilly and Company</td>
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<td>4800</td>
<td>3/2/2021</td>
</tr>
<tr>
<td>Peter</td>
<td>Parker</td>
<td>Johnson &amp; Johnson Pharmaceutical Research &amp; Development</td>
<td>3500</td>
<td></td>
<td>2/25/2021</td>
</tr>
</tbody>
</table>
Tracking Status of Outside Activity Requests

Your Outside Activity requests that are awaiting other individuals to approve can be found under the “Pending Dept Review or COI Review” tab.

You will receive an email notification when an Outside Activity request has completed electronic routing and is Approved/Disapproved. Your completed Outside Activity requests can be found under the “My Outside Activities” tab.
Departmental reviewers can access all the Outside Activity requests (e.g. outside employment and non-certified educational activities) that they have approved or disapproved for their faculty/staff members by searching under the “Approver” tab.
Comments and documents can be uploaded after the electronic request form has been approved. Select “Log Comment.”

A pop-up window will appear. Type your comments in the box and upload or drag and drop any documents you would like to add. Then select “OK” to save and exit.

For questions or assistance, contact the COI Office at coioffice@wakehealth.edu or 336-716-9300.