## Delegate Instructions for KCOI:

The COI Delegate functionality allows Reporters to assign Delegates to add, edit, and update answers and information within the Reporter's KCOI disclosure. However, Delegates **cannot** submit the disclosure for review. This **MUST** be done by the Reporter. Once the Delegate completes their action(s) the Reporter must return to the disclosure, review the updates, certify, and submit.

## Steps to Access a Reporter's KCOI Disclosure:

**STEP 1:** Go to <u>www.usmd.kuali.co/coi</u>. Log in using your University User ID and Password.

**STEP 2:** Navigate to Kuali COI. If prompted, select the Campus: **UMD - College Park**.

	kuali	•
Select Campus		
	UMaryland - Baltimore	
	UMD - College Park	

Complete the University's Multi-Factor Authentication (MFA) if prompted to do so. From the **Kuali "Apps" Page** - Click **"CONFLICT OF INTEREST**" (the icon with two arrows).



**STEP 3:** Click on **Disclosures** in the left navigation bar of the COI portal. Click on Disclosures Delegated to Me.

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12	Review Disclosures	MY DISCLOSURES	DISCLOSURES DELEGATED TO ME	_	
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*	Manage Delegates	LAST ACTION DATE		LAST ACTION	STATUS

**STEP 4:** In the **My Delegators** section in the upper right-hand corner of the screen, confirm/select the Delegator that you will add, edit, and update answers and information within their KCOI disclosure.

Disclosures			
MY DISCLOSURES	DISCLOSURES DELEGATED TO ME	]	
My Delegators Roy, Dawn Hicks ◆ C Create Disclosure			
LAST ACTION DATE		LAST ACTION	STATUS
You have yet to submit a disclos	sure		

**STEP 5:** Click the **Create Disclosure** button or click on the **Last Action Date** of the most recent version of an existing Disclosure.

Disclosures			
MY DISCLOSURES	DISCLOSURES DELEGATED TO ME	]	
My Delegators Roy, Dawn Hicks 🔷			
LAST ACTION DATE		LAST ACTION	STATUS
You have yet to submit a disclos	sure		

**STEP 6:** Complete the Disclosure as described in **Steps to Submit an Annual COI Disclosure**.

**Please NOTE:** The Submit button is **inactive** for Delegates. Delegates **cannot** submit the disclosure for review. This **MUST** be done by the Reporter.

**STEP 7:** Click the **Notify Reporter** button to send an email notification to the Reporter. Once the Delegate completes their action(s), the Reporter must return to the disclosure, review the updates, certify, and submit.

