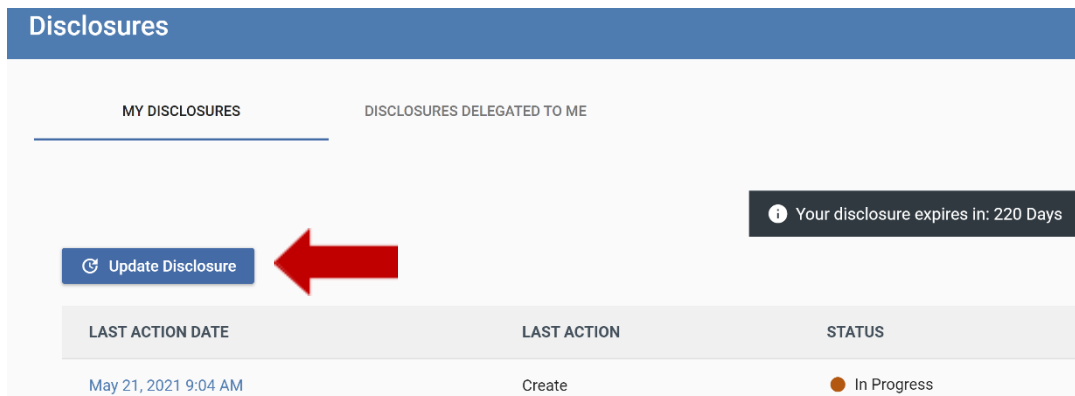


Updating or Revising a COI Disclosure in KCOI

Once your disclosure is submitted, it is automatically routed to your chair and dean and then to the COI Office. You will receive an email notification when: additional information is required, your disclosure is due to expire or has expired and/or it is approved/acknowledged. In some cases, you may be asked to go back into your disclosure to revise and/or update the information.

STEPS TO UPDATE A DISCLOSURE:

STEP 1: A COI disclosure must be **updated annually and within 30 days of a significant change** in the information provided. To do this, follow the same steps to enter the new or updated information (see instructions under Creating an Annual COI Disclosure in KCOI for a refresher). Once you are logged in, click **Update Disclosure** to enter your latest form. Review all answers and update or add as needed.



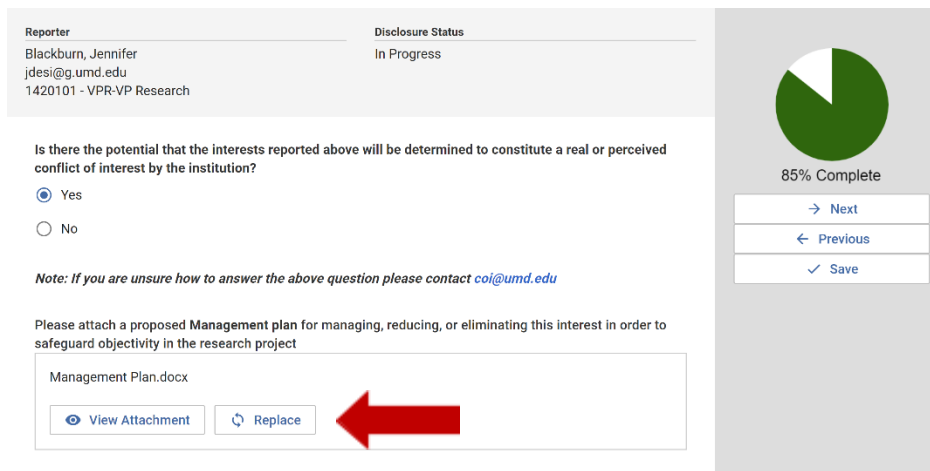
The screenshot shows the 'Disclosures' dashboard. At the top, there are two tabs: 'MY DISCLOSURES' (selected) and 'DISCLOSURES DELEGATED TO ME'. A notification banner on the right states 'Your disclosure expires in: 220 Days'. Below the tabs, there is a blue button labeled 'Update Disclosure' with a circular refresh icon, which is highlighted by a red arrow. Below the button is a table with the following data:

LAST ACTION DATE	LAST ACTION	STATUS
May 21, 2021 9:04 AM	Create	In Progress

STEP 2: If you need to *revise, add, or subtract* an **Entity or Relationship**, go to the corresponding area within the form.

If you listed Entities on your form, you will need to go to the **Outside Entities Information** page and indicate your assessment of your relationship (Please refer to: Creating an Annual COI Disclosure in KCOI).

If you need to make changes to the Management Plan attached to your disclosure, please go to the **Proposed Management Plan** page. To revise the Management Plan attached to the disclosure, click the **Replace** icon. Attach the updated Management Plan (MP). If your disclosure will/does requires more than one MP, please contact the COI office for instructions.



The screenshot shows a portion of the KCOI disclosure form. At the top, the 'Reporter' information is displayed: Blackburn, Jennifer (jdesi@g.umd.edu, 1420101 - VPR-VP Research). The 'Disclosure Status' is 'In Progress'. A progress indicator shows a green pie chart that is 85% complete. Below this, there is a question: 'Is there the potential that the interests reported above will be determined to constitute a real or perceived conflict of interest by the institution?'. The 'Yes' radio button is selected. A note below the question reads: 'Note: If you are unsure how to answer the above question please contact coi@umd.edu'. The next section asks the user to 'Please attach a proposed Management plan for managing, reducing, or eliminating this interest in order to safeguard objectivity in the research project'. An attachment area shows 'Management Plan.docx' with two buttons: 'View Attachment' and 'Replace'. The 'Replace' button is highlighted with a red arrow. On the right side of the form, there are three buttons: 'Next', 'Previous', and 'Save'.

Make any additional changes that are needed, continue to the **Certification** page, and click **Submit**.

STEPS TO REVISE A DISCLOSURE:

STEP 1: If your COI disclosure is returned to you for revisions, return to the disclosure via the Kuali portal (Please refer to: Creating an Annual COI Disclosure in KCOI). Your page will look similar to this, with the status reading **Revisions Required**. Click on the **date in blue** to enter the form.

Disclosures		
Your disclosure expires in: 354 Days		
LAST ACTION DATE	LAST ACTION	STATUS
Oct 12, 2021 1:14 PM	Send Back	Revisions Required

STEP 2: An overview of the reviewer comments and questions that need your attention will be shown in a box on the right.

Scroll down the form to find the reviewer comments and click the **Comment** boxes.

Research Conflicts of Interest

NOTE: Selecting 'Yes' to any of the questions below will prompt completion of the "Outside Entity Information" section of this form.

During the past twelve months, did you and/or your family members receive compensation, monetary or otherwise, from any external entity (not UMD) operating in areas relating to your UMD responsibilities?

Please include *any* compensation paid to you and your family members such as but not limited to: Consulting fees, Honoraria, Speaking fees, Sponsored or reimbursed travel, Income related to any interests or rights in intellectual property, Stipends, Dividends, Stock options, Gifts.

Yes

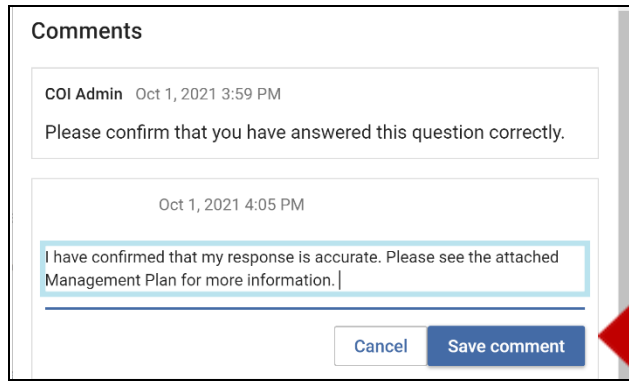
[Edit](#)

Do you and/or your family members have an equity interest or have received remuneration in any publicly or non-publicly traded entity?

No

[+ 2 Comments](#)

STEP 3: Respond to each comment and click **save comment**, closing the pop-up menu using the **X** at the top right corner.



Comments

COI Admin Oct 1, 2021 3:59 PM

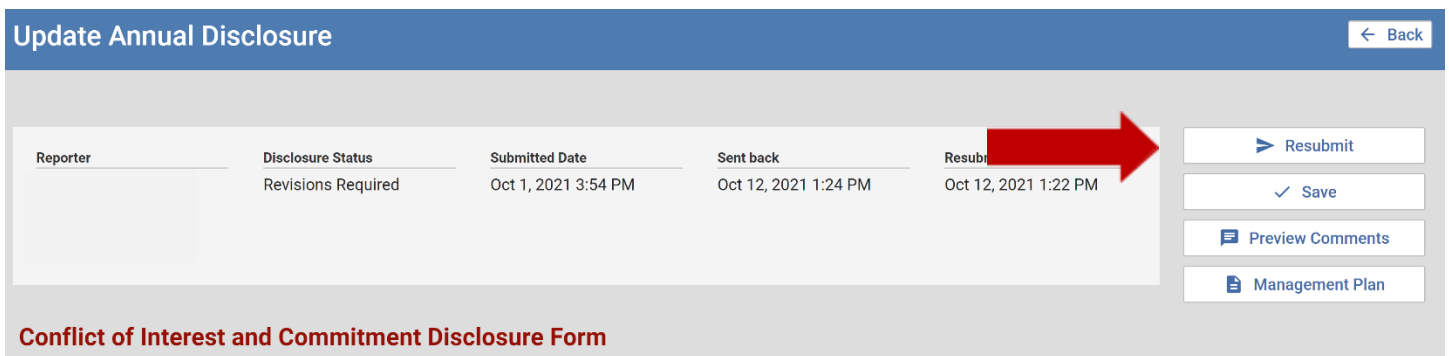
Please confirm that you have answered this question correctly.

Oct 1, 2021 4:05 PM

I have confirmed that my response is accurate. Please see the attached Management Plan for more information.

Cancel Save comment

STEP 4: Once you have provided all the required comments and information, click **Resubmit**.



Update Annual Disclosure ← Back

Reporter	Disclosure Status	Submitted Date	Sent back	Resubmit
	Revisions Required	Oct 1, 2021 3:54 PM	Oct 12, 2021 1:24 PM	Oct 12, 2021 1:22 PM

[▶ Resubmit](#)

[✓ Save](#)

[Preview Comments](#)

[Management Plan](#)

Conflict of Interest and Commitment Disclosure Form

Once you click **Resubmit**, your disclosure will be submitted to the reviewer who will be in touch if any additional information is required.