

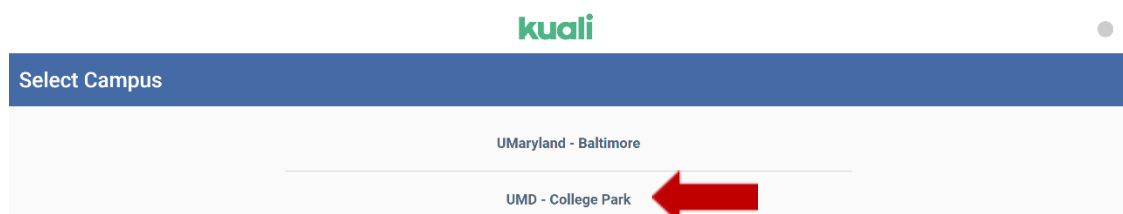
Delegate Instructions for KCOI:

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.

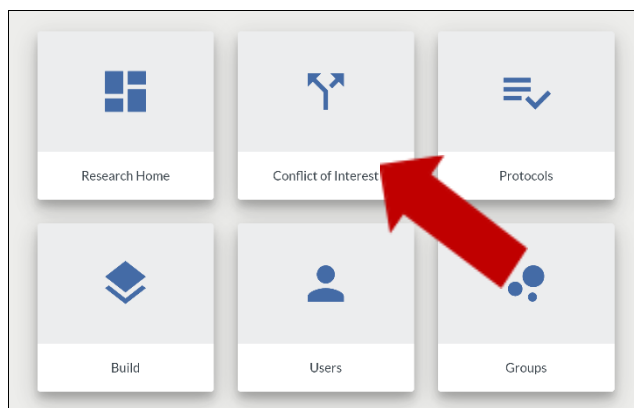
Steps to Access a Reporter's KCOI Disclosure:

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

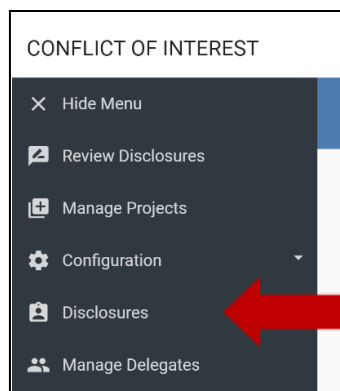
STEP 2: Navigate to Kuali COI. If prompted, select the Campus: **UMD - College Park**.



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.



STEP 4: In the **My Delegates** 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.



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



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.

