



MEMORANDUM

To: Kualii Conflict of Interest (KCOI) Viewers
From: Beth Brittan-Powell
Conflict of Interest Administrator
Subject: KCOI Viewer Access for Departments and Colleges
Date: June 2023

The COI Office will provide viewer access to KCOI to enable administrators to view the status of a disclosure in their department and/or college. We ask that you check KCOI before contacting COI@umd.edu to request an update.

To request access, go to UMD COI Access Request. Click new and fill out the information. You will need to sign the KCOI confidentiality statement and attach it in the request. Please select College, type your dept or college, and add chair or dean depending on the level of access you are requesting. When complete, hit save, and submit. The form will be routed automatically to Wendy for approval. Once approved, the COI Administrators will provide access.

You can go to: https://usmd.kuali.co/coi/view once you have access.

Accessing KCOI

The Disposition is the true status, not disclosure status.

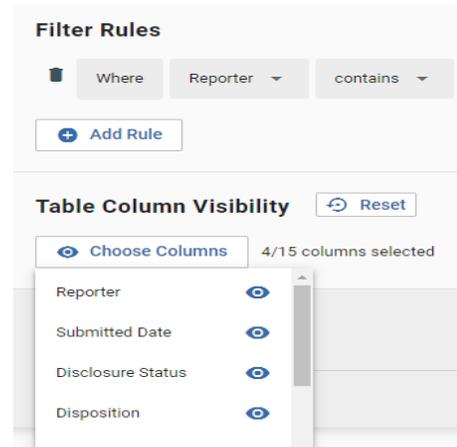
Search by name (last name, first name or just last name). The standard view shows the disclosure status. Click the name to see the approval information, including date and disposition. There are a number of potential dispositions currently: No COI Auto Approved (person answered no to all questions), No COI Admin Approved, No COI Committee Review, Managed Conflict (Risk levels 1, 2, or 3), and Annual Update Admin approved.

There are 2 new dispositions to be aware of: Unmanageable as disclosed - COI Committee and Unmanageable as disclosed - chair/dean level. At this time, the approval status will still show as approved, but the disposition will show as Unmanageable as disclosed.

Table with 3 columns: Submitted Date, Disclosure Status, Disposition. Row 1: Mar 4, 2022, Approved, Unmanageable as disclosed - COI Committee

If you see this disposition on your person's disclosure, please contact COI@umd.edu. This is an UNAPPROVED disposition (yes, KCOI says approve - we can't fix that right now).

PLEASE add disposition in your filter as a column to enable both the column visibility to include disclosure status AND the disposition (see pic to right).



**What are potential disclosure statuses?**

***At time of proposal***

Acceptable status

Submitted for approval  
Resubmitted

Approved (but look at DISPOSITION)

Unacceptable status

In progress  
Sent back  
Returned

Unmanageable as disclosed - COI Committee  
Unmanageable as disclosed - chair/dean level

***At time of Award***

Acceptable status

Approved (but look at DISPOSITION)

Unacceptable status

In progress  
Sent back  
Returned  
Submitted for approval  
Resubmitted

Unmanageable as disclosed - COI Committee  
Unmanageable as disclosed - chair/dean level

**I have checked the status, but when should I contact [COI@umd.edu](mailto:COI@umd.edu)?**

- You need to verify the final COI disposition.
- There is no record in the KCOI system.
- There is an unacceptable status in the record.
- The status and/or date doesn't make sense for the proposal.
- Anytime there is a question or concern.

**Email templates for information**

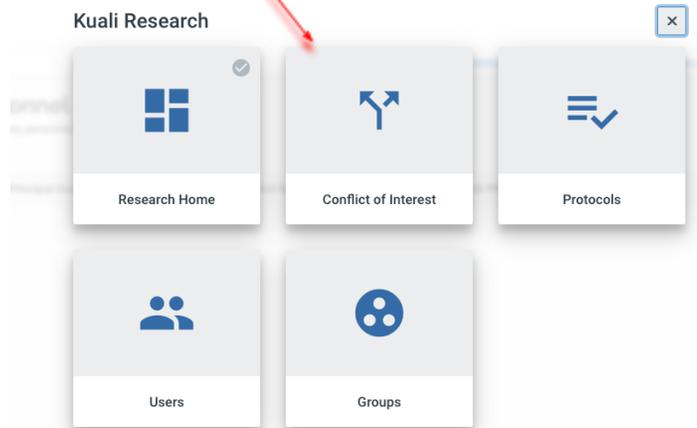


POC for COI: [COI@umd.edu](mailto:COI@umd.edu), 301-405-1459

## Instructions: searching in KCOI

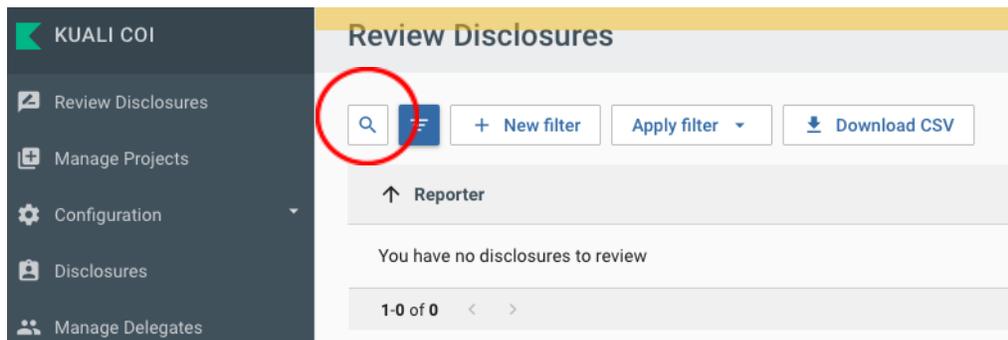
Go to: <https://usmd.kuali.co/coi/view>

Click on Conflict of Interest



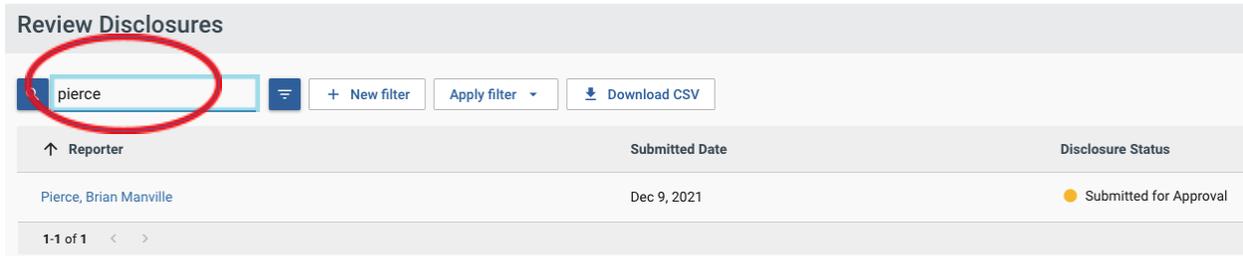
## Searching for Disclosures in KCOI

Click on View Disclosures on the left panel, and you will see a Magnifying glass at the top. After clicking on the magnifying glass, you will be able to type into the field.



This searches the Reporter name field, type in all or part of an investigator's name.

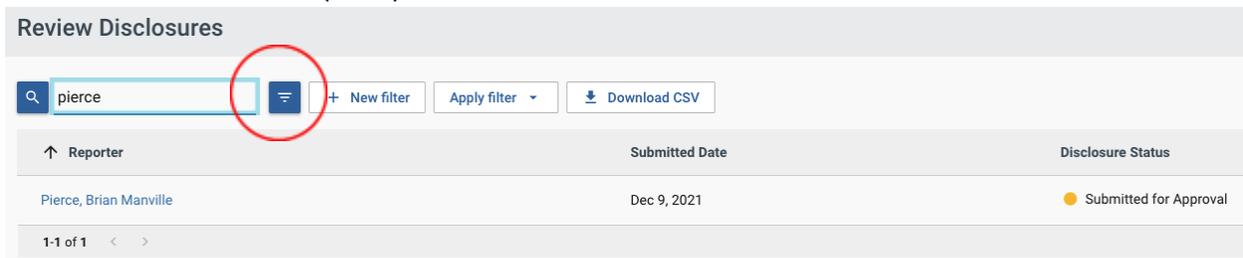
search tips: no wildcard (\*) needed, KCOI automatically searches as a contains statement start with the Last name, names are stored last name, first name, middle name so a search for brittan will return results for Brittan-Powell, Beth but a search for Beth Brittan-Powell will return no results



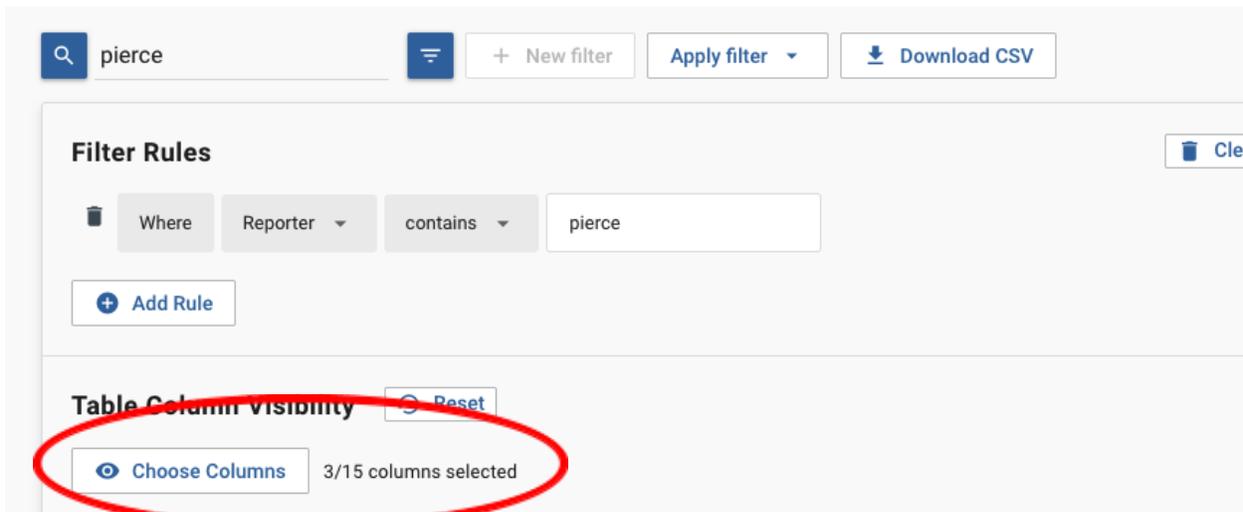
## Adding other data columns to your view in KCOI

Similar to the KR's General Search and Dashboards, KCOI allows you to create and save filters and decide which columns are returned in your results. Saved filters and views will persist so you do not need to set them up each time. The standard view shows the disclosure status, but you may want to see the disposition as well. To do that, create a filter and add the disposition column.

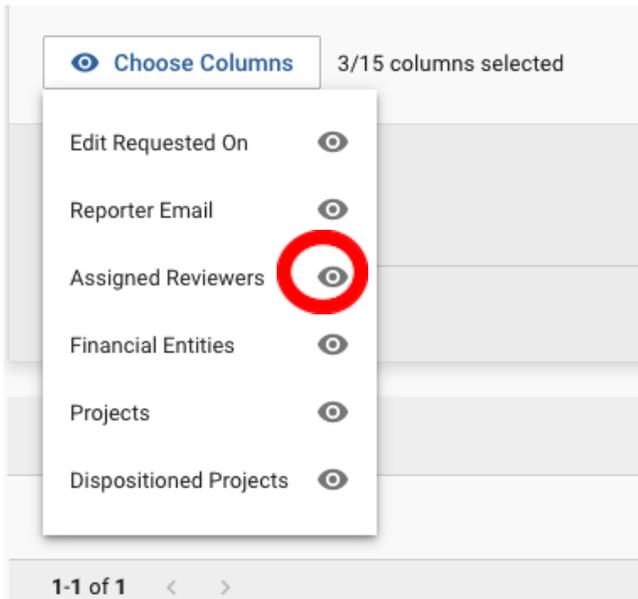
Click on the wind tunnel (filter).



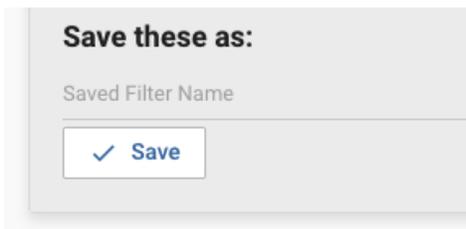
A new Filter Rule section will open up: Click on the "Choose Columns" under Table Column Visibility. (note there are 15 column types you can choose)



For example, you might want to know who the Assigned reviewers are for this disclosure. Click the “eye” by the column choice: Assigned Reviewers



Once this has been selected, you must click on the “Save button” for this to be a permanent change to your filter/screen whenever you access KCOI.



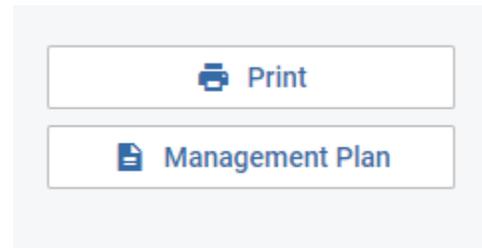
Your screen should now display these columns.

Reporter	Submitted Date	Disclosure Status	Assigned Reviewers
Pierce, Brian Manville	Dec 9, 2021	Submitted for Approval	William Regli Complete   Dec 14, 2021 Denise Clark Complete   Dec 18, 2021 Amitabh Varshney Complete   Jan 7, 2022 Joseph Kelly Incomplete

At the bottom of the table, it shows '1-1 of 1' with navigation arrows.

## Finding a Management Plan

Approval memos and Management Plans can be viewed by clicking on the Management Plan button in the top right hand corner of the screen. **This is the approved plan signed by the COI office and/or the President of UMD.** The Management Plan included at the bottom of the disclosure is the draft plan.



## Notification of Expiration

Faculty and staff disclose their outside activities and/or Significant Financial Interests in outside organizations that relate to their University Responsibilities on an annual basis by submitting the Disclosure Form. An updated Disclosure Form must be submitted within 30 days of any significant change in outside interests or Significant Financial Interests. Reporters are notified automatically by email multiple times before their disclosure expires (8 weeks, 6 weeks, 30 days, and 15 days before expiration).

If a reporter doesn't update their disclosure, the status will change to expired.