Creating an Annual COI Disclosure in KCOI
Steps to Submit

**STEP 1:** Go to [www.usmd.kuali.co](http://www.usmd.kuali.co). Log in using your University User ID and Password.

**STEP 2:** Navigate to KCOI. 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:** If this is your first time in KCOI, the small blue box will say **Create Disclosure**. If not, it will say **Update Disclosure**. In either case, click the Disclosure button.
NOW YOU HAVE ENTERED THE COI DISCLOSURE FORM.

Navigation Tips:
- The list on the left (starting with INTRODUCTION) details the steps needed to complete your form. The circle on the right will show your progress in green.
- The COI disclosure form has progressive display, meaning that the number of questions will increase or decrease depending on the answers you give.
- If at any point you want to leave and return later, click Save and log out using the drop down in the upper right under your name.
- Use the Next button to move through the form.

STEP 4: Review the INTRODUCTION page. Click the Next button in the upper right-hand corner of the screen.

STEP 5: Complete the ROLES page. Select University of Maryland, College Park. Answer the proceeding question. Click the Next button in the upper right-hand corner of the screen.
STEP 6: Navigate through the form, answering ALL questions. New ones will appear as you answer in the affirmative.

**NOTE:** The system will route you to various pages based on your response(s) to specific questions. Some of the pages listed below may be skipped if the information is not relevant to your disclosure. The circle on the right will show your progress throughout the process (in green). If at any point you want to leave and return later, click Save and log out using the drop down in the upper right under your name.

STEP 7: If prompted, review the **RESEARCH CONFLICTS OF INTEREST TRAINING** page. Click the Next button in the upper right-hand corner of the screen.

STEP 8: If prompted, complete the **RESEARCH FORM / RESEARCH CONFLICTS OF INTEREST** page. Answer the initial screening questions. Click the Next button in the upper right-hand corner of the screen.
STEP 9: Complete the GENERAL FORM page. In the Conflict of Interest and Conflict of Commitment Section, please select ALL types of outside activities in which you are involved. Please answer all questions regarding outside activities, noting that follow-up questions appear when some questions are answered YES. Click the Next button in the upper right-hand corner of the screen.

If you select “None” on the Conflict of Interest and Conflict of Commitment question, and answer No to ALL of the category questions that follow, you will be brought to the Certification page (see below).

Answering Yes to ANY of the Conflict of Interest and Conflict of Commitment category questions will bring you to the Outside Entity Information page.

STEP 10: If prompted, complete the OUTSIDE ENTITY INFORMATION page.
ADDING AN ENTITY:

- Click the Add Line or +Add Info button and answer the questions that display.
- Under the Relationship Section, click +Add Info and a new pop up will ask you to identify the person involved with this entity and the amount of compensation. Answer all questions here as well. Click Done after completing each pop up form.
- Review your Outside Entity entry and press Done when you’re ready.
- To EDIT an entity, click the pencil icon, OR, to REMOVE an entity, click the trashcan icon.
- Add additional Outside Entities, if necessary. Click the Next button in the upper right-hand corner of the screen.

Your entity will now appear in the form, along with the relationship you have just added. If you have multiple relationships with the same entry (perhaps both yourself and your partner, or you have both consulting and speaker fees), click +Add Line and complete another relationship form.

You can also close this and complete another Entity form, listing the same Entity with a different relationship.
Once you have added all relationships, scroll down to answer the remaining questions. Click **Done** to go back to the main **Outside Entity Information** page. Repeat this process for all Entities you wish to report and then click **Next**.

**NOTE:** A message will appear in red at the top of the screen if the form is incomplete. Scroll down the page until you find a section surrounded by a red box. That is where the fix needs to occur.

Go back to the Entity by clicking on the **Red Edit Pen** to the left. On the Edit page, look for the word **Required** in **bold red** font and enter the missing information. Once you have done so, click **Done** to return to the **Outside Entity Information** page. If there are still **red boxes**, return to Edit the forms and repeat.
STEP 11: If prompted, complete the PROPOSED MANAGEMENT PLAN page. Answer the question that appears. If answering YES, please attach a proposed Management Plan for managing, reducing, or eliminating the interest in order to safeguard objectivity in the research project (examples can be found on the UMD COI page). If answering NO, an attachment is not required. When finished, click the Next button in the upper right-hand corner of the screen.

STEP 12: On the CERTIFICATION page, review the certification text. When finished, click the Submit button in the upper right-hand corner of the screen. You have now completed your Annual Conflict of Interest Disclosure.

STEP 13: KCOI will bring you back to your main COI page. You will see your disclosure, the last action (which in this case is Submit) and the status (Submitted for Approval or Approved). Please review your responses to the Conflict of Interest and Commitment Disclosure Form. To edit, please request to edit to notify the administrator.
NOTE: If you wish to print your disclosure, click the Blue Print Icon located on the right side of the page.

After your disclosure is submitted, it is routed to your chair and dean for review and then to the COI Office. You will receive an email notification when: additional information is required, your disclosure is due to expire, it has expired and/or it is approved/acknowledged. In some cases, you will be asked to go back into your disclosure to revise or update the information. See the guide on KCOI Disclosure Revision for more details.

If you have any questions or need assistance with the online Annual Conflict of Interest Disclosure process, please email coi@umd.edu or call 301-405-4212.