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](http://www.usmd.kuali.co). 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 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.

![Image of My Delegators section]

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

![Image of Create Disclosure button]

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.

![Image of Notify Reporter button]