How to Use Bulk Declarations for Federal Financial Entities in Kuali COI

Background: For those Researchers that have interest(s) to disclose on awarded federal projects, Kuali COI will require the Researcher to declare whether their interest(s) is related to a specific federal project. On 5/5/21, Kuali deployed the bulk declaration feature for the Researcher with more than two interest(s) to declare per federal project whether all their interest(s) are either all “not related” OR “related”.

1. Log into Kuali COI using your Active Directory credentials and Duo two-factor authentication

2. Use the blue “Update Disclosure” button to enter your disclosure portfolio.

   a. Note: If the status of your most recent disclosure portfolio submission is “Submitted for Approval”, please request to edit your disclosure (tutorial here)

3. Select “Next” to navigate to the screen “Federal Project Declarations”. Use the dropdown arrow on a project card to expand the project information.
4. Navigate down the project information (i.e., title, PI, start and end date, etc.) to the “Relationships” section. Declarations are required for all your Federal Financial Entities. Click the blue text “Bulk Project Declarations”.

5. You can indicate either all financial entities are “Related” or “Not Related” to the project selected – once an option has been selected, the “Apply to All” button will activate blue. “Related” or “Not Related” will apply to all the financial entities.
   a. Researchers can still make changes to specific entities by toggling from “Related” to “Not Related” (or vice versa) or change one interest next to the company name.

The COI Office will review the interest(s) and the projects and determine the review process based on the applicable federal policy.
If you have questions, please contact the Conflict of Interest Office at info-coi@ucsd.edu or (858) 534-6465.