How to Create Initial COI Disclosure in Kuali COI

1. Investigator and/or delegate will receive an email notification with the project information requiring a COI disclosure.

2. Select the link from the email notification or log in to the Kuali COI at https://ucsd.kuali.co/coi using Active Directory.

3. Select “Create Disclosure”.

4. If the investigator has non-federal projects, the 700U page will display first with the project requiring a COI disclosure highlighted in red box. Select the down arrow to open the 700U form.
5. Answer all questions on the 700U form.

6. One completed, select “Next” to proceed to the next step. If any of the required fields are blank, an error message will appear and those required fields will be highlighted in red box.
7. If needed, select FORM PRVIEW or DOWNLOAD UNSIGNED FORM to review the 700U before signing. Investigator is required to verify and submit by entering his/her name in the signature box. This step must be completed by the investigator. The delegate can’t verify and submit. Click on VERIFY & SUBMIT.

8. The certification language will display. Click on VERIFY & SUBMIT.

9. After verify and submitting the 700U form, if the investigator has federal projects, the federal gating question page will appear. If the investigator does not have any non-federal projects, the federal gating question page will display first.
10. If the answer to the gating question is Yes, the investigator will be directed to enter their financial interests. Select Add Info to add a new entity. For more than one entity, select Add Line.

11. Complete all the questions with applicable answers. Select DONE.

12. The Federal Certification page will display. Select Submit.
13. The disclosure status will now display as “Submitted for Approval”. Investigator can select the Back button to return to the dashboard.

14. On the dashboard, the submitted disclosure will display on top with status “submitted for Approval” indicating it has been routed to the Conflict of Interest Office for approval. In addition, a message will display with a reminder to the investigator the number of days till expiration.

If you have questions, please contact the Conflict of Interest Office at info-coi@ucsd.edu or (858) 534-6465.