How Delegates assist with a Researcher’s COI Disclosure(s) in Kuali COI

1. Log in to Kuali COI at [http://ucsd.kuali.co/coi/](http://ucsd.kuali.co/coi/)
   a. We highly recommend using the browser Chrome for completing disclosures!

2. Once a delegate logs into Kuali COI homepage, the first page is “My Disclosures”. This will create a disclosure for the delegate. Do NOT click the create or submit button for yourself, unless you know you are PI or senior key on research projects.

   Click on “Disclosures Delegated to Me” on the COI homepage

   ![Image of Disclosures Delegated to Me]

3. All of the people who have delegated to you are located in the dropdown menu. To create a disclosure, you must pick a name from that list and then click the blue button “Create Disclosure”. If there is already a disclosure from the delegator, then the button will say “Update Disclosure”.

   ![Image of Disclosures]

4. After clicking the blue button, you, as the delegate, can complete/edit the disclosure portfolio for this particular PI. The history of disclosers under the update disclosure button, is only for the researcher chosen. If the “create” or “update” disclosure buttons do not appear, then you must email the COI office at info-coi@ucsd.edu to return the researchers portfolio.
   a. If you have any questions about how to complete the disclosure, please see the tutorial “How to Create Initial Disclosure”
5. What delegates cannot do:
   a. Delegates **cannot** sign, certify and submit the researcher’s portfolio.
   b. **If the researcher has 700-U projects,** the delegate **cannot** go further past the signing of 700-U page until the reporter/researcher has to logged in and “validate/submit” screen.
   c. If the researcher has federal projects, the delegate **cannot** certify and submit the researcher’s portfolio.

6. Once at the federal certification screen then the delegate should click the “Back” button to get return to the “My Disclosure” screen to access the “Disclosures Delegated to Me”.

Please note: the Delegate does not have the ability to communicate to the Researcher in the Kuali COI system. The Delegate will need to inform the Researcher outside of Kuali COI that they have entered data on their behalf.