How to Add a New Interest to your Federal PHS Portfolio in Kuali COI

1. Log in to the Kuali COI at using your Active Directory credentials and Two-Factor Authentication.

2. Select the blue “Update Disclosure” button to access your disclosure. If this button is not available, it is likely that your disclosure is currently locked into the system for review. To request your disclosure be returned, please use the linked steps.

3. Click “Next” through the 700-U screens.

   **Note:** If there are pending 700U projects, those must be completed prior to step #4 on this tutorial. Those 700U projects will be highlighted in red listed under “Needs Attention” section.
4. After passing through the 700U Validate/Submit screen, if the investigator has federal funded projects, the federal gating question page will appear. If the investigator has new interests to disclose, answer “Yes” to the gating question.

5. If the answer to the gating question is Yes, the investigator needs to click **Next** to reach the screen “Federal Financial Entities” to enter their financial interests.
6. Select **Add Info** to enter in information about a new entity. To add more than one entity, select **Add Line**.

7. Click “+ Add Info” to open up this entry box. Complete all the questions with applicable answers. Additional questions will appear depending upon the type(s) of relationship chosen. All questions must be answered. Select the “DONE” button when you are finished.

   Use the “Next” button when you have finished adding your entities.
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8. The Federal Certification page will display. Select Submit.

9. The “Update Annual Disclosure” page contains a full summary of the disclosure submission. The page contains information about the Reporter, disclosure status (Submitted for Approval), and time of submission. Investigator can select the Back button to return to the dashboard.
10. On the dashboard, the submitted disclosure will display right on the first row with status “Submitted for Approval” indicating it has been routed to the Conflict of Interest Office for approval. This particular status means that the disclosure is locked for COI office to review. If further edits or updates need to be made, please request to return the disclosure. 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.