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

1. Investigator and/or delegate will log in to the Kuali COI at https://ucsd.kuali.co/coi using your Active Directory credentials and Two-Factor Authentication.

2. Select the blue “Update Disclosure” button to start.

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 projects, the federal PHS gating question page will appear. If the investigator has new interests to disclose, keep the answer to the gating question as Yes.

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 add a new entity. For more than one entity, select **Add Line**.
7. 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 DONE.

8. The Federal Certification page will display. Select Submit.

9. The disclosure status will now display as “Submitted for Approval”. Investigator can select the Back button to return to the dashboard.
10. 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.