Filtering can be used to help researchers find specific projects within Kuali COI in one of two screens, federal (“Federal Project Declarations” screen) or non-federal (“700-U Forms” screen). Filtering will be helpful when researchers have updates of financial interests.

The filtering parameters are:

- title of the project
- name of the PI of the project
- role of the research on the project
- project type (Proposal Development, Institutional Proposal, Award)
- sponsor of the project
- prime sponsor of the project
- notice of opportunity
- ID/code of the sponsor

Steps to Follow:

1. Log into Kuali COI using your Business Systems credentials and two-factor authentication

2. Filtering is accessible in both the editable version of your disclosure as well as in any read-only (previous) submissions. The filter works the same way in both screens, federal (“Federal Project Declarations” screen) or non-federal (“700-U Forms” screen).

   Please note: while all projects in a portfolio can be searched and filtered on either the 700U Form screen or the Federal Project Declarations screen, only the 700U forms will be available on the 700U Forms screen and only federal declarations will be available on the Federal Project Declarations screen.

   The Kuali COI defaults at the 700U Forms screen, in order to search on the Federal Project Declarations screen, the researcher will have to click “Next” to reach this screen.
3. Use the search bar with the magnifying glass and “Search for something…” to type in your search parameters.

**700U Forms screen**

Use the search bar to find projects.

**Federal Project Declarations screen**

Click on projects to view details.
How to Find Projects in COI Disclosure Portfolio by Filtering

4. When you type something into the search bar, there will be a dropdown menu of possible filters. To select a filter, click one of the results in the dropdown.

5. Once you have clicked one of the results on the dropdown, a grey pill box will appear under the search bar containing the filter you have selected.

6. You can also see the number of results from the filtered by looking at the Filtered Results. The fraction (in this case, 1/4) indicates that there is 1 project out of the 4 in the disclosure portfolio that applies under this particular filter.
7. You can filter by multiple parameters (i.e., Sponsor Name and Project Title) by typing in additional search words into the search box. Each of the filters you add, will be listed in a grey pill box.

8. To clear filters, you can click the blue “CLEAR ALL FILTERS” or the “X” in each of the grey pill boxes.