HOW TO INACTIVATE A FEDERAL FINANCIAL ENTITY

Researchers can use the following steps to inactive a financial entity in their Kuali COI disclosure portfolio for their federally funded projects.

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

2. Use the blue “Update Disclosure” button to enter your disclosure portfolio. If the status of your most recent disclosure portfolio submission is “Submitted for Approval”, please request to edit your disclosure so you are able to edit (tutorial here)

Note: These instructions for inactivating a federal financial entity are only applicable when in the editable version of your disclosure portfolio.

3. Click through the portfolio until you reach the Federal Financial Entities screen in your disclosure portfolio
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4. Scroll to the bottom of the screen and locate your financial entities. To edit one of the financial entities, click the pen icon in the row with the entity you would like to edit.

5. After you click the pen icon, an “Edit” box will appear for that financial entity. Find the “Active” toggle bar at the top of the financial entity’s “Edit” box. The entity is an active entity when the toggle bar is blue.

6. To inactivate the entity, click the toggle bar. The toggle bar will turn grey.
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7. To save all changes in the “Edit” box, click the “Done” button at the bottom of the “Edit” box.

8. The system will take you back to the Federal Financial Entities page. Note that in the “Active” column for financial entity of Pfizer there is a “No”.

9. When you reach the Federal Project Declarations screen, the inactive financial entities will not be listed for you to indicate a relationship with.

Note: You only need to declare the relationship between your financial entities and the project once the award has arrived for the project.

Note: If you only have one financial entity and that entity is no longer active after 12 months, you will need to deactivate the entity and then go back a screen to the Federal Gating Question (after the 12 months of when your financial interest has ended) to change your answer from Yes to No.