Adding a Delegate in Kuali COI

Purpose: Kuali COI system allows an Investigator to give someone else, i.e., a delegate, the ability to enter data on his/her behalf in the Kuali COI system; however, the Investigator must verify, certify and submit.

Delegates will receive the same Kuali COI email notifications (from the vendor Kuali) as the Investigator.

1. Log in to the Kuali COI at [https://ucsd.kuali.co/coi](https://ucsd.kuali.co/coi)

2. When the “Disclosures” page opens, select “Manage Delegates” from the left navigation bar.

3. “My Delegates” will be preselected for you, then select “+ Add Delegate”.

4. A new search box will open. Enter the name of the person you would like to add as a delegate. Once you have found the right person, select the “Add” button. If the name is not found, try searching by their UCSD email address.
5. Once a delegate has been added, more delegates can be added by selecting “+ Add Delegate”

6. Delegates that have been added or removed will receive an email notification from the vendor Kuali.

7. For the Investigator to remove a delegate: navigate to the “Disclosures” page and select “Manage Delegates” from the left navigation bar. “My Delegates” will be preselected for you, then select the trash icon next to the delegate’s name.

8. For a Delegate to remove themselves from an Investigator’s Discloser Portfolio, select “Manage Delegates” from the left navigation. Select “USERS DELEGATED TO ME” and then select the trash icon next to the Investigator’s name.

For questions, please contact the Conflict of Interest Office at info-coi@ucsd.edu or (858) 534-6465.