Assigning a Delegate in Kuali COI
UMass Amherst Best Practices & Kuali Knowledge Base Guide

The COI Delegate functionality allows Reporters to assign Delegates to have access and complete their disclosure on their behalf. These Delegates can edit the disclosure but cannot submit; that still must be done by the Reporter.

How to Assign a COI Delegate

- **LOG IN**
  https://umass.kuali.co/dashboard using the Reporter’s NetID and Password

- **Navigate to Kuali COI**
  Using “Common Tasks” and “My Disclosures” or through “Switch Apps” and “Conflict of Interest”.

- In the left menu the Reporter will see **Manage Delegates** as an option.

- In the page that opens click **Add Delegate** to assign someone as a Delegate. Multiple Delegates may be assigned and will appear under **My Delegates**. They can be removed by using the trash can symbol.

- Delegates can add, edit and update answers and information giving within the Reporter’s Kuali COI disclosure but cannot submit the it for review. That must be done by the Reporter.
  
  - **IMPORTANT:** Currently, the Reporter will not receive an automated notification when the Delegate completes their portion of the Disclosure.

- Once the Delegate completes their action(s) the Reporter must return to the disclosure, review the updates, certify, and submit.

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