UMassAmherst | Research & Engagement                    kuali

**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.
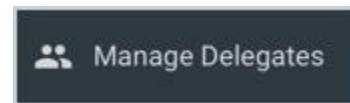
**How to Assign a COI Delegate**

- **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.

Please contact Melinda LeLacheur, melindal@research.umass.edu or (413)545-5283 with any questions.