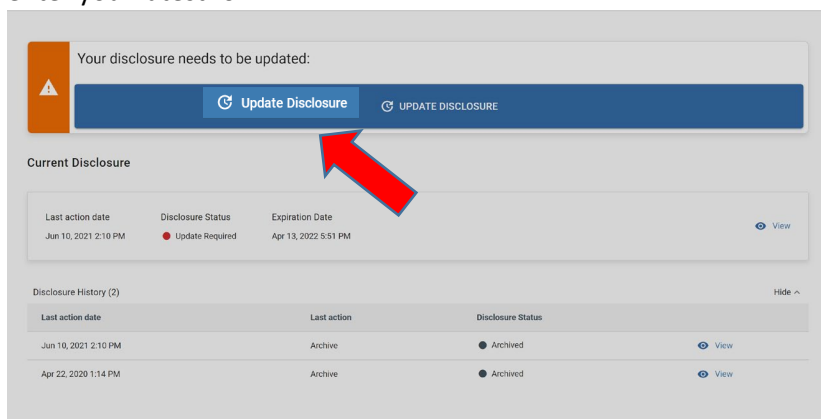


Updating or Revising Your COI Disclosure in Kuali

After your disclosure is submitted, it is automatically routed to the Office of Research Compliance where the review process begins. You will receive an email notification when it is approved, if further information is required, if it is due to expire, or if it has expired. In some cases, you will be asked to go back into your disclosure to revise or update the information.

Updating your disclosure

- Your COI disclosure must be updated annually or within 30 days of a significant change in the information provided.
- To do this, follow the same steps to enter your COI disclosure page (login to Kuali, click into Kuali Conflict of Interest Module).
- Once you are in Kuali COI, you will see a screen similar to this one: click **Update Disclosure** to enter your latest form.



The screenshot shows a web interface for Kuali COI. At the top, a message states "Your disclosure needs to be updated:" next to a warning icon. Below this is a blue bar with a circular refresh icon and the text "Update Disclosure". A red arrow points to this button. Underneath, the "Current Disclosure" section shows a table with columns: Last action date (Jun 10, 2021 2:10 PM), Disclosure Status (Update Required with a red dot), and Expiration Date (Apr 13, 2022 5:51 PM). A "View" link is on the right. Below this is a "Disclosure History (2)" section with a "Hide" button. It contains a table with columns: Last action date, Last action, and Disclosure Status. The first row shows "Jun 10, 2021 2:10 PM", "Archive", and "Archived" with a "View" link. The second row shows "Apr 22, 2020 1:14 PM", "Archive", and "Archived" with a "View" link.

Last action date	Disclosure Status	Expiration Date	
Jun 10, 2021 2:10 PM	Update Required	Apr 13, 2022 5:51 PM	View

Last action date	Last action	Disclosure Status	
Jun 10, 2021 2:10 PM	Archive	Archived	View
Apr 22, 2020 1:14 PM	Archive	Archived	View

- If you need to *revise, add, or subtract* an **Entity** or **Relationship**, or change or add a **Project Declaration**, go to the corresponding area within the form.
- If you listed Entities on your form, you will need to go to the **Project Declaration** page and indicate your assessment of your relationship (See the *Creating your Annual COI Disclosure in Kuali* guide for more details).
- Make whatever changes are needed, continue to the **Certification** page, and click **Submit**.

Revising your disclosure

- If your COI disclosure is returned to you for *revisions*, return to the disclosure via the Kuali portal (see the *Creating your Annual COI Disclosure in Kuali* guide).
- Your page will look similar to this, with the status reading **Returned**
- Click on the **Update Disclosure** box to enter the form.

Current Disclosure

[Update Disclosure](#)

Last action date	Disclosure Status	Expiration Date	View
Aug 23, 2021 7:19 AM	Returned	Feb 23, 2022 10:01 AM	

Disclosure History (0) [Hide](#)

Last action date	Last action	Disclosure Status
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- An overview of the reviewer comments and questions that need your attention will be shown in a yellow box on the right.

Update Annual Disclosure

Reporter: [Name] Disclosure Status: Revisions Required Submitted Date: Mar 6, 2019 1:58 PM Sent back: Mar 19, 2019 10:19 AM Returned: Mar 6, 2019 1:50 PM

Conflict of Interest/Financial Conflict of Interest/Conflict of Commitment Disclosure Form

UMass Amherst is an agency of public trust. Consistent with the principles of ethical conduct established under federal, state and University requirements, all University personnel have an obligation to be objective and impartial in making decisions on behalf of UMass. Those who conduct sponsored activities (e.g. research or training grants) must be mindful of the obligations that accompany stewardship of external funds, including regulations and guidelines to promote objectivity in the conduct of the sponsored activity/research.

To ensure objectivity and stewardship of public funds, members of the University community are expected to:

- Prevent individual or institutional conflicts of interest or conflicts of commitment in their assigned duties for the University;
- Disclose potential conflicts of interest to the University and adhere to any requirements created to manage or eliminate actual or apparent conflicts of interest;
- Ensure personal relationships or outside financial interests do not interfere with objective judgment in decisions affecting University employment, research or the academic progress of a student; and
- Ensure their assigned duties for the University receive their full effort, attention and commitment.

This Integrated Conflicts of Interest and Commitment Disclosure Form collects information regarding conflicts of interest, conflicts of commitment and related topics in order to allow the University to comply with various Federal and State regulations, as further detailed in University policies including the [University Policy for Promoting Objectivity in Biomedical Research](#), the [University Policy for Compliance with NSF and Other Federal Academic Financial Disclosure Regulations](#), [UMass Policy on Conflict of Interest Relating to Intellectual Property and Commercial Ventures](#), and [UMass Policy on Faculty Consulting and Outside Activities \(Amherst and Boston\)](#).

Please respond or revise your answers to the following:

- [Outside Entity Relationships](#)
- [Status](#)
- [Outside Entity Relationships](#)
- [Outside Activities](#)
- [Equity and Ownership](#)

[Preview Comments](#) [Management Plan](#)

- Scroll down the form to find the red reviewer comments and click the red **Comment** boxes.

ACTIVE	ENTITY NAME	OUTSIDE ENTITY RELATIONSHIPS				
Yes	CompanyA	<table border="1"> <thead> <tr> <th>PERSON</th> <th>COMPENSATION AMOUNT</th> </tr> </thead> <tbody> <tr> <td>Self</td> <td>\$1,000 to \$2,500</td> </tr> </tbody> </table>	PERSON	COMPENSATION AMOUNT	Self	\$1,000 to \$2,500
PERSON	COMPENSATION AMOUNT					
Self	\$1,000 to \$2,500					

By clicking [submit](#), I affirm that the information submitted in this form, together with any attachments, is accurate to the best of my knowledge, that I have read and understand my obligations under applicable

- Respond to each comment and click **save comment**, closing the popup menu using the **X** at the top right corner.

Outside Entity Relationships - ryFFIDSkV

Comments

COI Admin Feb 27, 2019 2:10 PM
Please provide additional information on this entity.

Serena Williams Feb 28, 2019 9:52 AM
some thing

[Cancel](#) [Save comment](#)

- Once you have provided all the required comments and information, click **Resubmit**.

CONFLICT OF INTEREST Williams, Serena T (impersonated by User01, Test)

[← Back](#) **Update Annual Disclosure**

Reporter Williams, Serena T stwilliams@umass.edu	Disclosure Status Revisions Required	Submitted Date Feb 28, 2019 9:34 AM	Sent back Feb 28, 2019 9:35 AM	Returned Feb 28, 2019 9:32 AM
--------------------------------------------------------	-----------------------------------------	----------------------------------------	-----------------------------------	----------------------------------

Conflict of Interest/Financial Conflict of Interest/Conflict of Commitment Disclosure Form

UMass Amherst is an agent of public trust. Consistent with the policies of ethical conduct established under Federal, state and University requirements, all University personnel have an obligation to be objective.

[Resubmit](#)
[Preview Comments](#)
[Management Plan](#)



- Your Disclosure is now resubmitted to the reviewer who will be in touch if anything more is required.

If you have any questions or need assistance with the UMass Amherst online Annual Conflict of Interest Disclosure process, please email rescomp@research.umass.edu or call 413-545-5283.