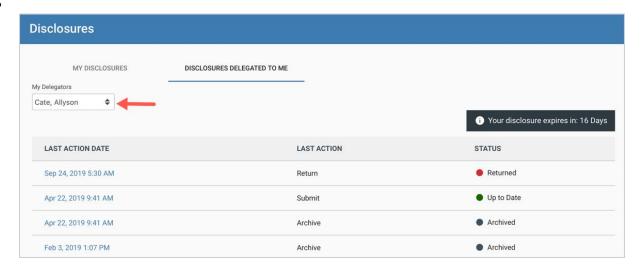UMassAmherst | Research & Engagement

kuali

Delegate Instructions 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 Access a Reporter's Kuali COI Disclosure

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

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

- On the **Disclosures** page, click on **Disclosures Delegated to Me**.
-

- Under **My Delegators** choose the Reporter for whom an action needs to be completed. This will bring the Delegate to the Reporter's Kuali COI disclosure.

- 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.