How to report your annual COI

All faculty and administrative professional employees at CSU are required to complete a Conflict of Interest and Commitment (COI/C) disclosure annually. CSU has implemented a rolling review process. The rolling review process allows reporters to disclose any time during the year and is valid for 364 days.

If you disclose on July 4th 2019, you will have to complete another disclosure before July 4th 2020. If an new SFI or project requires an updated disclosure, the “clock” is reset for another 364 days.

- Cam the Ram submits an approved disclosure on January 14, 2019 but receives a new grant from the Department of Defense on June 3, 2019 and has to update their COI disclosure. After approval of the updated disclosure, Cam will not have to submit again until June 2, 2020.

This process is completed via the Kuali research web application both on and off-campus. Information can be found on the COI page.

Access COI module via the COI page (https://colostate.kuali.co/coi) or via the Kuali Research link on the AAR site and log in via your CSU eID.

1. Once logged in, you will see the option to Create your disclosure (or Edit if you have a disclosure in-progress). Please read and answer each question completely and carefully.

2. Please read this page completely and select “Next”.

![Kuali Research Web Application](https://colostate.kuali.co/coi)
3. Answer the screening question about your relationship to research funded by agencies following Public Health Service (PHS) regulations. More information can be found by clicking the link at the bottom of the page.

4. Selecting “No” will move you to the next section. A “Yes” response will show a page with information about PHS COI/C training.
   - PHS training be certified every 4 years.

5. Please carefully review the information regarding International Engagement.
6. Next, you will be directed to the COI/C disclosure screening questions. Please read each of these screening questions carefully and answer as accurately as possible. If you have any questions, please see the FAQ’s on the COI page or contact the COI help desk.

7. If you answered “No” to all six questions, indicating that you have no significant financial conflicts, you will be directed to the Certification page. If you answered “yes” to any question, you please proceed to step 9. Otherwise, click on the “Submit” button to certify your answers and complete your disclosure.

8. You should see a confirmation screen, indicating that your disclosure was submitted and approved. You will receive a confirmation e-mail once your disclosure is approved.
9. If you answered “Yes” to any of the 6 screening questions, you will be asked to enter information about your significant financial entity(ies) and your relationship to the entity.

Click on “Add Info” to add an entity or select the pencil icon to add/edit an entity. Please enter all of the information for your financial entity.

Click the pencil again to add any additional financial entities. If your entity is no longer active, you should de-activate it by clicking the pencil and toggling. A blue button is active, grey is not. **Do not delete a non-active entity.**

10. Be sure to complete all of the pop-up fields, **including the “Outside Entity Relationship” section** -- which describes whether you, your spouse, or your dependent is the person involved with this entity. Select “ + Add Line” or the pencil icon to add this information. If you have multiple financial entities, click the pencil again to describe the relationships.
11. To improve reporting, if you are a Primary Investigator, Co-PI, or key person on some federally funded projects, you will be asked to disclose on the specific relationships between the project and your financial entity. You can choose to view in “Project View” or “Financial Entity View”.

Define the relationship between your project

12. Review the certification screen and select “submit” to certify your disclosure.

13. If answered “Yes” to any of the 6 screening questions, your disclosure will be routed to the COI office or your supervisor. You will receive a confirmation e-mail once your disclosure is approved.

14. If you have any problems, please contact the COI Help desk.