How to report your annual COI

All faculty and administrative professional employees at CSU are required to complete a COI disclosure annually. Unlike previous years where the COI submission deadline was May 15th, CSU has implemented a rolling review process. If you disclose on July 4th 2019, you will have to complete another disclosure before July 4th 2020 (e.g. May 1st 2020 disclosures should be renewed by April 30th 2021; or prior if a new COI arises).

This process is completed via the Kuali research web application both on and off-campus. Off-campus users will have to register with Duo Security and use two-factor authentication. More information about off-campus access and other COI FAQ’s including “What is a Significant Financial Interest?” can be found on the COI page of the RICRO website.

1. Accessing the COI module via the COI page or via the Kuali Research link on the AAR site will prompt you to log in via your CSU eID.

2. 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.
3. Once “Create Disclosure” is selected, the first page provides information about the COI policy at CSU. More information can be found on the COI web page. After reading the CSU Conflict of Interest and Commitment Disclosure select “Next”.

4. The next page has a screening question about 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, CSU Financial Conflicts of Interest Policy References.
5. If you selected “Yes” to the PHS screening question, you will be directed to a page with information about COI training. It is a requirement that this training be completed every 4 years. The link will take you to the PHS training slides which will show your certification status for PHS training.
6. Next, you will be directed to the CSU Conflict of Interest and Commitment Disclosure Questions. Please read each of these disclosure 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 conflicts, you will be directed to the Certification page. If you answered “yes” to any question, proceed to step 9 to enter your financial entity information. 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 approved.

9. If you answered “yes” to any of the 6 screening questions, you will be asked to enter information about your external financial entity(ies). 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 non-active entities.
10. Be sure to complete all of the pop-up fields, including the “Outside Entity Relationship”, which describes whether you, your spouse, or your dependent is the person involved with this entity. Click the pencil to add this information. If you have multiple relationships, click the pencil again to describe an additional relationship.

Click pencil to add/edit. Garbage can to delete. You can view other relevant information here.
11. Review the certification screen and select “submit” to certify your disclosure.

12. You should see a confirmation screen, indicating that your disclosure was submitted and waiting for approval. You will receive a confirmation e-mail once your disclosure is approved.

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