

Kuali Research

COI Disclosures Training Guide

Bowie State University
Summer 2026

Activity 1 – Logging In

Step No.	Instructions
1	Navigate to: https://bowiestate-sbx.kuali.co/ (This link is for training and practice purposes only)
2	Log in via SSO <i>Note: If you cannot access the Kuali system, please contact kualiadmin@bowiestate.edu with your issue.</i>

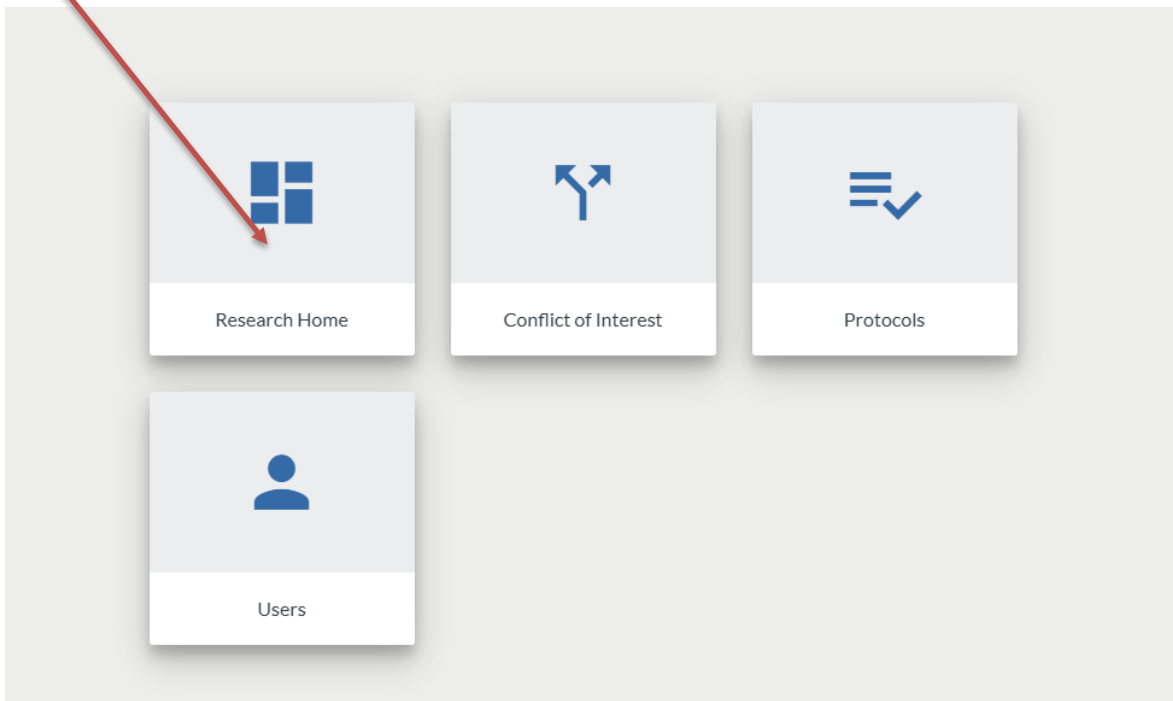
Activity 2 – Adding a User to a Proposal (This is also covered in the Proposal Development (PD) Guide)

Step No. Instructions

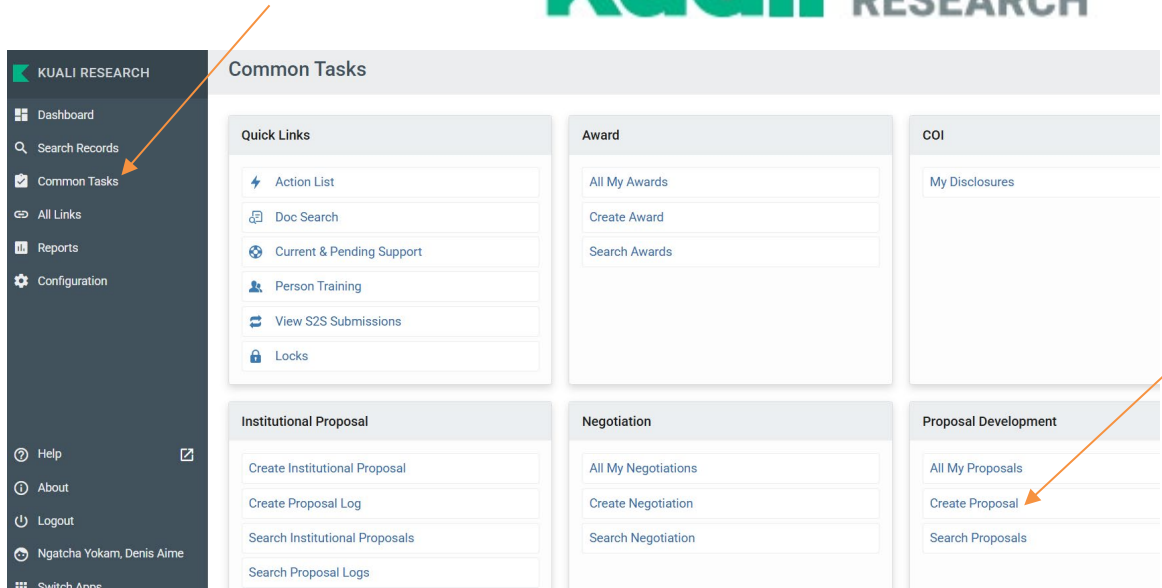
From the **Home** Screen:

- Click [Research Home](#)

1



- Click the [Common Tasks](#) page
- Click on [Create Proposal](#) in the [Proposal Development](#) card



Complete the fields that display

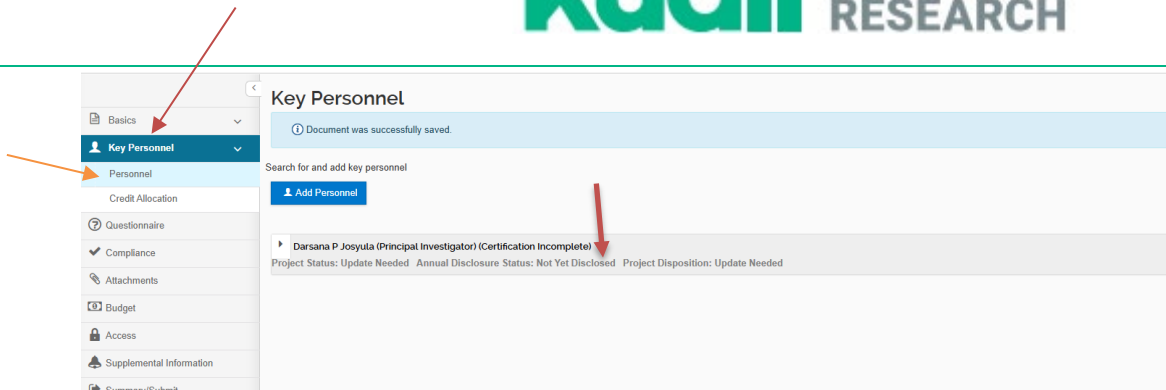
- **Proposal Type:** **New**
- **Lead Unit:** **Select your Unit**
- **Activity Type:** **Research - Basic**
- **Project Dates:** **08/01/2026** (start date) and **07/31/2028** (end date)
- **Project Title:** **My Important Project**
- **Sponsor:** **NIH**
(Quick Tip: you can start typing the sponsor name in the sponsor field and the available options for selection will display)
- **Notice of Opportunity:** **Federal Solicitation**
- **Opportunity ID:** **OPP-1234567**
- **Opportunity/Opportunity Link:** **<https://exampleopportunity.gov>**
- **Principal Investigator:** Click on the Hourglass Icon and search for **yourself**
- **Sponsor Deadline:** **07/15/2026**
- **Sponsor Deadline Type:** **Receipt**
- **Anticipated Award Type:** **Grant**
- Click the **Save and Continue** button

2

Press **Save and Continue**

3

- Press **Key Personnel** in the left hand navigation
- Press **Personnel** in the submenu that displays



- Review the grey text that appears beneath your name.

All researchers listed on a proposal will receive an automated notification prompting them to complete their **Conflict of Interest (COI) disclosure**.

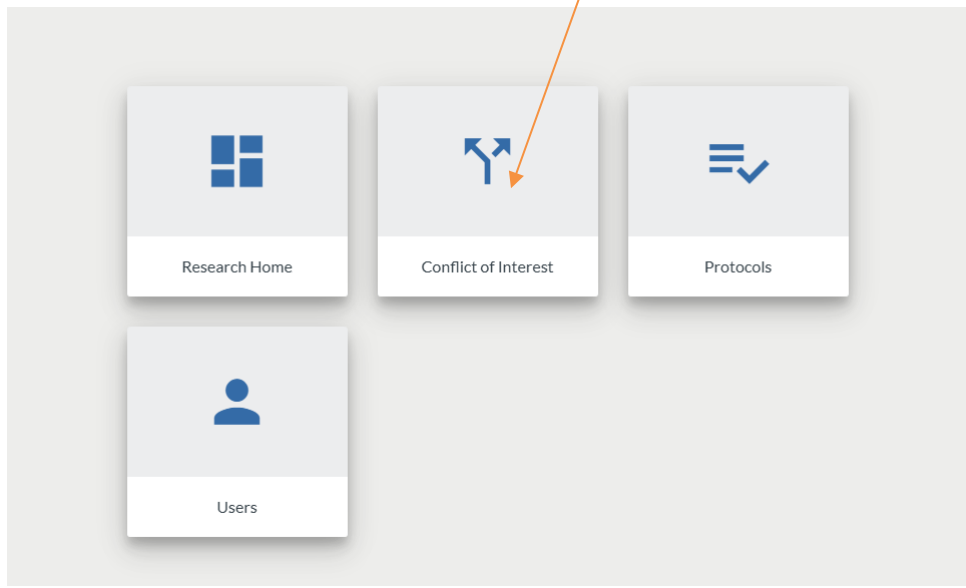
Activity 3 – Creating a New Disclosure

Step No. Instructions

From the **Home** Screen:

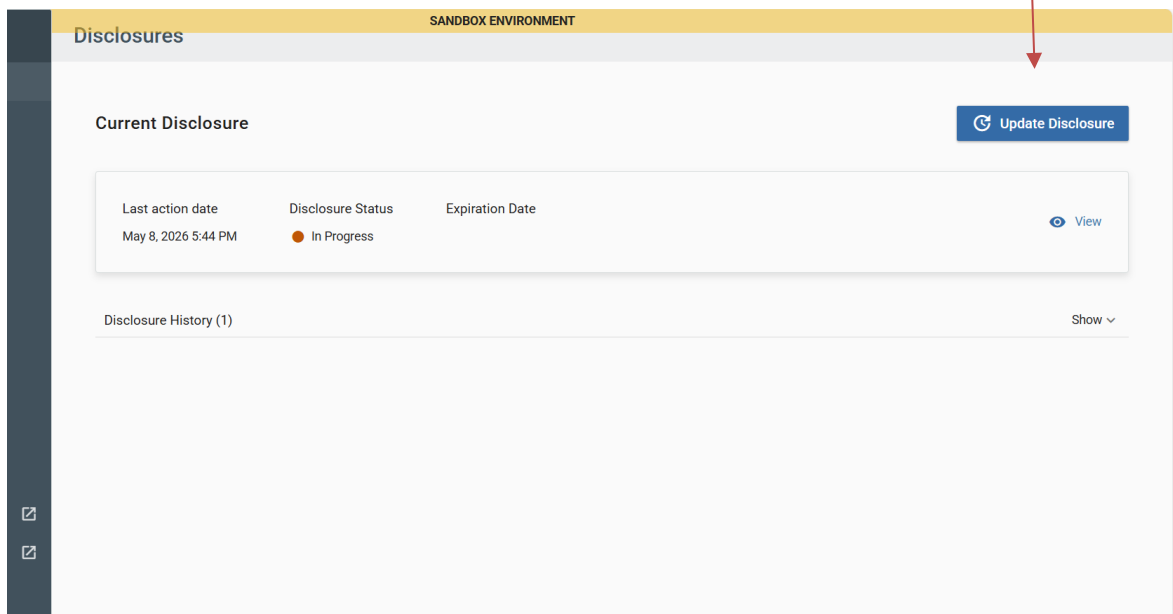
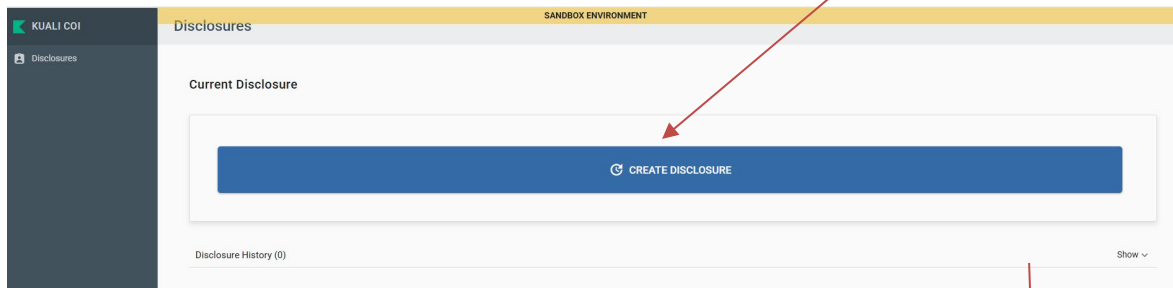
- Click [Conflict of Interest](#)

1



From the **Disclosures** screen:

- Click the **Create Disclosure** or **Update Disclosure** button



Review the Introduction page and make sure you understand all the instructions.

2

- Click the **Next** button in the upper right hand corner of the screen

3

The **Research Form** will open. For training purposes, answer the initial screening questions by selecting "Yes" for at least one of the questions. (*In the production environment, these questions should always be answered accurately based on the specifics of your research project*):

- Click the **Next** button in the upper right hand corner of the screen

The **Financial Entities** will display.

4

CONFLICT OF INTEREST **kuali** CONTINUOUS ENVIRONMENT Singh, Shalini S (impersonated by Ngatcha Yokam, De

Update Annual Disclosure

● Introduction
● Research Form
● OUTSIDE ENTITY
● Certification

Reporter: Singh, Shalini S
ssingh@bowiestate.edu
CC230007 - Department of Computer Science

Disclosure Status: In Progress

Financial Entity Instructions

Based on your previous responses, you are required to complete the 'Financial Entity Information' section of this Disclosure Form. Follow the instructions provided below to add or update entities in your listing:

- NEW ENTITIES: Click '+ Add Info' below to add new entities.
- ADDITIONAL ENTITIES: Click '+ Add Line' to insert additional entities.
- EXISTING ENTITIES: Select the Edit Pencil next to an existing entity to edit as needed.

To change entity status to active or inactive, select the pencil icon to the left of the entity. At the top of the dialog box, select the toggle button to active or inactive, scroll down to bottom of dialogue box, and select done.

Columns + Add Line

ACTIVE	ENTITY NAME	TYPE OF ENTITY	BUSINESS OF ENTITY
+ Add Info			

Questions concerning any research-related Disclosure should be addressed to Dr. Yvonne Harris, Vice President for Research and Innovation, at col@bowiestate.edu.

66% Complete

Next Previous Save

- Click the **Add Line** button for **Financial Entity Information** and answer the questions that display
- From the **"Add"** Window (see below), enter the required information and click the **Add Line** button for the Relationships and answer the relationship questions

Add

Is this an **ACTIVE** entity?

Name of Organization/Individual:
[Click Here to Add Text](#)

Entity Type:
Select from drop-down:

Describe the business of this entity:
[Click Here to Add Text](#)

Please describe the relationship you and/or your family member has with this entity within the last 12 months, or that you anticipate having in the next 12 months (you must have at least one). A description of ALL relationships with an entity is required. (Example, you are a paid consultant for this organization, your spouse volunteers with this organization one weekend a year at their annual gala. In this scenario, you have two relationships for this outside entity, one for 'self', and one for 'spouse'.)

Instructions to add or update relationships.

- Click "+ Add Info" below to add your first relationship.
- Click "+ Add Line" to insert additional relationships.
- Select the **Edit Pencil** next to a relationship to edit or update.

[Columns](#) [+ Add Line](#)

	PERSON	RELATIONSHIP	RELATIONSHIP T
+ Add Info			

Do you have any attachments to add relevant to this outside entity?

[X Cancel](#) [✓ Done](#)

test

Please describe
months, or that
ALL relationships
your spouse or
you have two re

Instructions to a

- Click "+ Ad
- Click "+ Ad
- Select the

Person involved with this entity :
--- [redacted]

Relationship:
Select from drop-down:
-- [redacted]

Relationship Type:
Select from drop-down: [redacted]

Select an amount:
[redacted]

× Cancel Done

Do you have any attachments to add relevant to this outside entity?
NOTE: An attachment is *NOT* required.

Yes
 No

- Review your Financial Entity and press **Done** when you're ready.
- Click the **Next** button in the upper right hand corner of the screen

Review your projects and make sure they are all displayed. Enter the following information for each project. Enter a **Declaration** and **Reporter Comments** for each project/entity relationship.

- 5
- Click the **Next** button in the upper right hand corner of the screen

Note: This only applies to researchers with existing projects.

6

Review the Certification text and make sure it all makes sense.

Press the **Submit** button and confirm that your disclosure displays in a read-only form.

CONFLICT OF INTEREST | kuali | SINGAPORE ENVIRONMENT | Singh, Shalini S (impersonated by Ngatcha Yokam, Denis Ai)

Update Annual Disclosure

This disclosure is read-only
To edit, please request permission from your administrator.

Request Edit

Print
Management Plan

Reporter	Disclosure Status	Submitted Date
Singh, Shalini S ssingh@bowiestate.edu CC230007 - Department of Computer Science	Submitted for Approval	May 7, 2026 2:12 PM

Conflict of Interest Form
Disclosure of Significant Financial Interests and Obligations

Activity 4 – Completing Requested Changes as a Researcher

Step No. Instructions

1 From the COI Portal click on [Update Disclosure](#) or [View](#) to open the disclosure

- Review the comments listed in the yellow box below the [Resubmit](#) button and confirm that Resubmit is greyed out.

2

CONFLICT OF INTEREST | kuali | Shumba, Rosemary (impersonated by Ngatcha Yokam, Denis Ai)

Update Annual Disclosure

Reporter	Disclosure Status	Submitted Date	Sent back
Shumba, Rosemary rshumba@bowiestate.edu CC230007 - Department of Computer Science	Revisions Required	May 8, 2026 12:31 PM	May 8, 2026 1:31 PM

Conflict of Interest Form
Disclosure of Significant Financial Interests and Obligations

As part of its commitment to promoting objectivity in research and in compliance with federal regulations on conflict of interest, Bowie State University (BSU) requires that the investigators submit a disclosure form with the proposal routing form to ensure that the design, conduct and reporting of sponsored program activity will not be biased by the significant financial interests or obligations of any investigator. Investigators who are required to file include Principal Investigators, Co-Principal Investigators, project directors, and any individuals who are in a significant decision-making role or who have or will have signature authority for a grant account. Each investigator with significant decision-making or signature authority for a grant must submit a disclosure of Significant Financial Interests and Obligations with each routed proposal. In addition, a revised Disclosure must be filed with the Office of Research and Sponsored Programs whenever an investigator or others identified above have a material change in significant financial interests and obligations. The Disclosure of Significant Financial Interests and Obligations is a two-part form. All investigators in the categories identified above must complete Part I. If answers to Part I indicate that there may be a real or apparent conflict of interest, Part II must be completed and filed. The completed Disclosure of Significant Financial Interests and Obligations should be included in your proposal packet. The Office of Research and Sponsored Programs will not submit your sponsored programs application until your disclosure form has been submitted. Compliance with this requirement is also a prerequisite to the acceptance by the Bowie State University of any research grant or contract. The submission of this annual Disclosure satisfies the requirements of the Department of Health and Human Services (PHS) and the National Science Foundation (NSF) and queries on application forms from Foundations and other private organizations about

Resubmit

Please respond or revise your answers to the following:

- Aggregated Compensation

Save

Preview Comments

Management Plan

Click on the first comment in the yellow box and complete the following steps.

- Review the comment
- Add a response comment and press the **Save comment** button.


3

- Press the **X** in the upper right corner of the comment box and confirm that the **Aggregated Compensation** field is no longer listed in the yellow box beneath the Resubmit button.

4

Scroll down to the **Financial Entities** list and click on the comment button that appears.

Review the comment and then press the **X** in the upper right corner of the comment box.

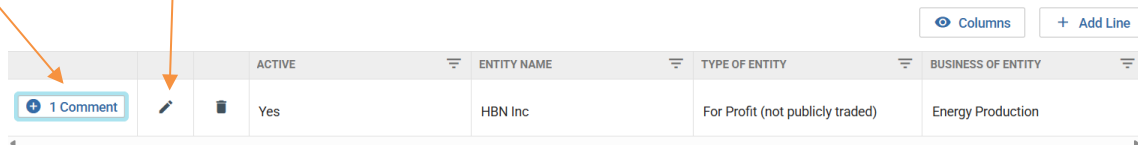
Press the  button that appears in the list item with the comment and update your Description of work. Scroll to the bottom of the **Entity** and press the **Done** button when you're ready.



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	ACTIVE	ENTITY NAME	TYPE OF ENTITY	BUSINESS OF ENTITY
  1 Comment	Yes	HBN Inc	For Profit (not publicly traded)	Energy Production

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5

Scroll to the top of the screen and confirm that the **Resubmit** button is no longer greyed out.

Press the **Resubmit** button.