Research Management System - Conflict of Interest
Adding, Editing, or Removing a Delegate
Quick Guide
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Disclaimer: Even if you grant a delegate access to your record, you are ultimately responsible for the accuracy of the information submitted. It is important to review any information entered by a delegate before submission.

Navigating to the Delegate Menu


B. Select My Profile from the top-level menu.

C. In the left-hand box, select Delegates. The screen will display your delegates and those who have made you a delegate (if any).

Adding a New Delegate

Giving a delegate access to your disclosure information is a two-step process. First, add the delegate to your profile and then grant the delegate access to your COI account.

Step 1: Adding a Delegate to your Profile

A. To add a new delegate to your profile, select Add.
B. Search for the person’s name using the format “Last, First.”

C. Click on the **name of the intended delegate**. If you would like this delegate to have access to your additional RMS features, see the Optional RMS Features section below, otherwise, continue to step D.

D. Click **Save**. The delegate now appears on your Delegate listing but does **not yet have access to edit your disclosures.**

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**Optional RMS Features**
Underneath the name selection box, you will see options for giving this delegate access to Messages, Work Queue, and Calendar.

1. **Messages**
   - Show - gives delegate access to view and delete your messages within RMS
   - Hide - does not allow delegate access to your messages within RMS [default setting]

2. **Work Queue (also known as “Things to Do” or “Action Items”)**
   - Show - gives delegate access to view your work queue
   - Hide - does not allow delegate access to your work queue [default setting]

3. **Calendar (Internal RMS calendar that is not connected to Outlook) [no access is the default setting]**
   a. View - Allows delegate to view your calendar
   b. Edit - Allows delegate to edit your calendar
   c. Add - Delegate can add items
   d. Delete - Delegate can delete items
Step 2: Granting Delegate Access to Disclosures

A. To allow this delegate access to edit your disclosures, click on the delegate’s name. A pop-up box will appear.

B. Click the blue Add button to give the delegate access to your information. Another popup box will appear.

C. Click to highlight Conflict of Interest in the left-hand menu of the pop-up box then click Select.
D. Select the access to give this delegate.

**Required Fields**

1. **Record Access** - Allows the delegate edit access to your disclosure statements. Select the left radio button.
   - The view radio button is selected by default and **must be changed** to allow this delegate to enter disclosure information on your behalf.
   - **Note**: Delegates cannot submit Financial Disclosure Statements or Research Disclosure Forms on your behalf. Delegates may, however, submit travel disclosures on your behalf.

**Other Fields**

2. **Signing Authority** - Leave unchecked. This has no function in the COI module.
3. **Complete Action Items** - Leave unchecked. This has no function in the COI module.
4. **Batch Communications** - Copies delegate on email reminders to update disclosures.
5. **Routing** - Leave unchecked. This has no function in the COI module.
6. **Action Items** - Copies delegate on email reminders to complete Action Items such as the Management Plans issued by the Conflicts of Interest Review Committee.

E. Click **Save**. The delegate can now access the features as designated by your selections. Note: Delegates cannot change their own access or email notification preferences. Any changes must be made by the delegator.
Removing or Editing Delegate Access

A. To change a delegate’s access, go to My Profile in the RMS top-level menu.

B. In the left-hand box, select Delegates. The screen will display your delegates and those who have made you a delegate (if any).

C. 1. To remove a delegate, find the name of the delegate you would like to remove and click Delete.
   2. To edit a delegate's access, click the name of the delegate you would like to change. A pop-up box will appear.
   3. Change the desired settings and click Save. For a description of each setting, see Adding a New Delegate.

Additional Support

COI Website: https://coi.wustl.edu
COI Policy Support: Ask COI: (314) 747-4181
Technical Support: Service Desk: (314) 935-5707
The current internet browser requirements to run this software can be found at https://coi.wustl.edu/faq.