

CoeusLite My COI: Create Proposal Disclosure Screening Questions



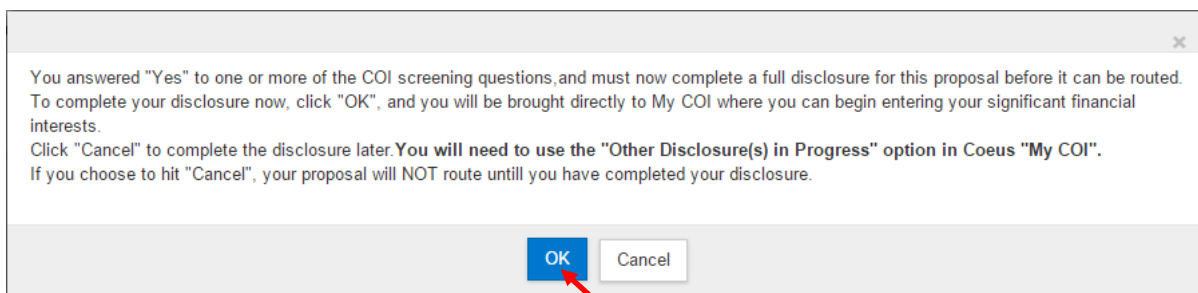
Proposal Disclosure is a four-step process including **Step 1: Screening Questions**, **Step 2: Significant Financial Interests**, **Step 3: Relationships**, **Step 4: Certify**. You may select a step from the left navigation to move to a specific screen.



If prompted following proposal certification, *you must complete Proposal Disclosure in CoeusLite My COI for the proposal to be submitted to route for internal approval* required for submission to sponsor.

Proposal Certification Screening Questions

The COI Screening Questions are completed as part of Proposal Certification. If you answer **Yes** to one or more of the COI screening questions during Certification, you will receive a pop-up window directing you to complete a full COI disclosure in **My COI**. Select one of the following options:

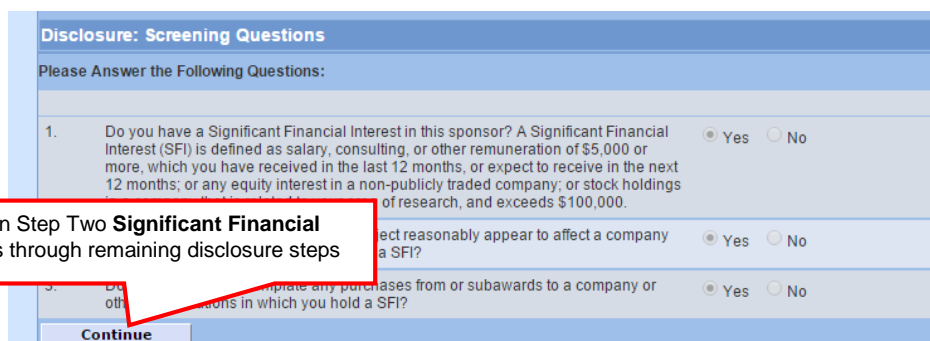


- ▶ Option 1: Click the **OK** button and you will be brought directly to the My COI Proposal Disclosure **Step 1: Screening Questions** (display only as Screening Questions were answered during Proposal certification).
- ▶ Option 2: Click the **Cancel** button. At a later time, access CoeusLite My COI and click on the **Other Disclosure(s) in Progress** button under the **Revise** heading.

Option 1: Proposal Disclosure directly from Proposal Certification

After clicking the **OK** button on the Proposal Certification pop-up window you will be brought directly into the My COI Proposal Disclosure.

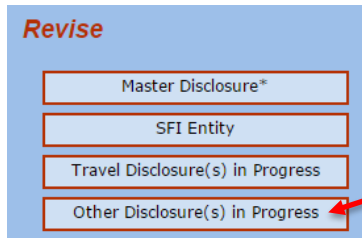
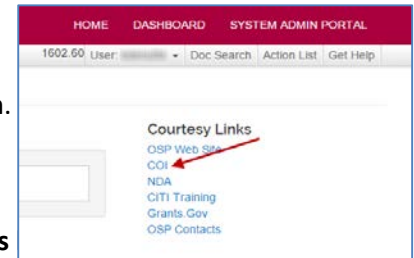
1. The **Financial Disclosure by <lastname, firstname>** screen will display.
2. The Screening Questions will be display only as they were completed during Proposal Certification.
3. Click the Continue button to begin Step Two: **Significant Financial Interests**.



Option 2: Open Proposal Disclosure from My COI screen

After clicking the **Cancel** button on the Proposal Certification pop-up window, you must access CoeusLite My COI to open the Proposal Disclosure.

1. From the Quali Coeus Home Page select **COI** from the **Courtesy Links** section. Then in CoeusLite select **My COI** from the header.
2. From the CoeusLite **MY COI** screen, click the **Other Disclosure (s) in Progress**



3. The **Financial Disclosure by <lastname, firstname>** screen will display. In the Edit section review Title and Project #s then click **Proposal** to open the disclosure.

Financial Disclosure by DeNutte, Kara L						
Name : DeNutte, Kara L			User Name : kdenutte			
Department : 391000:Office of Sponsored Programs			Phone : 6172531696			
Faculty : No		Email : kdenutte@mit.edu				
Expiration Date : 12/16/2016						
Submitted Disclosures are displayed in two groups. The disclosures in the first group are still in an editable status. The disclosures in the second group can only be viewed at this time. Reviews that have been completed can be viewed as part of your Master Disclosure and do not appear here.						
Click on the Event Type to select that disclosure.						
Edit						
Discl.Event Type	Title	Project #	Start Date	End Date	Discl.Event Status	Last Updated
Proposal	KD TEST - Cert and COI	00030689	01-Jun-2016	31-May-2021	In Progress	2016-02-25 10:34 AM by kdenutte
View						
Discl.Event Type	Title	Project #	Start Date	End Date	Discl.Event Status	Last Updated
Proposal	KD Test of disclosure and proposal status	00030789	01-Jan-2016	31-Dec-2016	Submitted For Review	2016-02-10 12:26 PM by kdenutte

4. The **Financial Disclosure by <lastname, firstname>** screen will display.
5. The **Financial Disclosure by <lastname, firstname>** screen will display.
6. The text on the screen will indicate that Screening Questions were completed during Proposal Certification. Click **Continue** to review your responses and continue through disclosure steps or select Step Two: **Significant Financial Interests** from the left navigation.

Disclosure View

Step One

✓ Screening Questions >>

Step Two

Significant Financial Interests

Step Three

Relationships

Step Four

Certify

Proposal Questions

MY COI Home

Financial Disclosure by Hensler, Judith

Name : Hensler, Judith User Name : jhensler

Department : 150001:Center for Coeus Training Phone : 617-2533200

Faculty : No Email : jhensler@mit.edu

Screening Questions Significant Financial Interests Relationships Certify

Step One: Screening Questions

You answered screening questions related to your Financial Interests as part of your Proposal Certification. You answered "Yes" to at least one of the COI questions and must complete the full COI disclosure. The answers you entered are available for you to review.

Note: If you answered any of the questions incorrectly, you cannot change your answers here; if you need to correct any of the answers you must go back to the proposal and update them in Proposal Certification.

Continue

Click to review **Significant Financial Interests**

Click **Continue** to progress through each disclosure Step screen

Step One: Disclosure Screening Questions

1. To view your responses to the Screening Questions, click the **Screening Questions** link from the left navigation.
2. The **Disclosure Screening Questions** will display.

Disclosure View

- Step One
 - ✓ Screening Questions >>
- Step Two
 - ✓ Significant Financial Interests
- Step Three
 - Relationships
- Step Four
 - Certify

Financial Disclosure by Haskell, Edward

Name : Haskell, Edward User Name : haskelle
Department : 150001:Center for Coeus Training Phone : 617-253-1000
Faculty : Yes Email : eddieh@mit.edu

Screening Questions Significant Financial Interests Relationships Certify

For your project listed below, please answer the certification questionnaire: [Help](#)

Proposal # : 00016398
Title : Elevating Phenethylamine concentration through cocoa bean roasting and processing
Start Date : 01-Jan-2014 End Date : 31-Dec-2016

Disclosure: Screening Questions

Please Answer the Following Questions:

1. Do you have a Significant Financial Interest in this sponsor? Yes No
A Significant Financial Interest (SFI) is defined as salary, consulting, or other remuneration of \$5,000 or more, which you have received in the last 12 months, or expect to receive in the next 12 months; or any equity interest in a non-publicly traded company; or stock holdings in a company that is related to your area of research, and exceeds \$100,000.
2. Could the work contemplated in this project reasonably appear to affect a company or other organization in which you have a SFI? Yes No
3. Does this project contemplate any purchases from or subawards to a company or other organizations in which you hold a SFI? Yes No

Continue

MY COI Home

Screening questions and responses from Proposal Certification

Proposal Info

3. To change your response to any of the Screening Questions, close the disclosure - navigate to MY COI Home. Then return to the Proposal Certification in KC using the original **Email Request** you received to Certify the proposal. Or have the proposal preparer notify you again to Certify. Once edits to Questions are complete, Save and Close the proposal certifications and return to the Proposal Disclosure following **Option 2 Open Proposal Disclosure from My COI** screen instructions above.
4. Click the **Continue** button to move to **Step 2: Significant Financial Interests**. See the *CoeusLite My COI: Proposal Disclosure Significant Financial Interests* Quick Reference card for more information.



If you **Quit** before completing the Proposal Disclosure, you must return to CoeusLite My COI and click the **Other Disclosures in Progress** button under the **Revise** heading.

Revise

- Master Disclosure*
- SFI Entity
- Travel Disclosure(s) in Progress
- Other Disclosure(s) in Progress

Getting help

MIT Financial Conflicts Of Interest in Research

MIT COI website – <http://coi.mit.edu>

MIT COI Policy – <http://coi.mit.edu/policy>

MIT COI User Guide – <http://coi.mit.edu/reference-and-user-guides/coi-user-guide>

Conflict of Interest Officer

COI-help@mit.edu

Questions about the Conflict of Interest Policy

Kuali Coeus Support Team

kc-help@mit.edu

CoeusLite My COI system issues

Include your **Name, Contact information**, and a brief description of the problem you are experiencing.