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 Kuali 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 button under the Revise heading.

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.

4. The Financial Disclosure by <lastname, firstname> screen will display.

5. 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.
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 Screening Questions](image)

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 Process** button under the **Revise** heading.
Getting help

MIT Financial Conflicts Of Interest in Research

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.