CoeusLite My COI: Create SFI Entity Relationships

Creating a SFI Entity is a four-step process including Step 1: Screening Questions, Step 2: Significant Financial Interests, Step 3: Relationships, Step 4: Certify.

Step Three: Relationships

Instructions for Relationships will display. To access examples click on the Entity Sponsored Project Relationships link.

1. Click the Continue button.

A list of projects will display. The list includes Award #, Account #, Title, Sponsor and Award Date details.

1. Click the Continue button to complete the Relationship step for each Project.

You may also click on an Award # to complete the Relationship step for that specific project.
The Financial Disclosure Relationship screen is divided into two sections:

**Project Details** – Award #, Title, Start and End Date.
You may click **Skip Project** to move to the next project.

**Significant Financial Interest** – for each SFI, the Entity Name and description you entered previously will display.
You must enter a detailed description of the relationship of the SFI to the Project.

1. You may use the **Set COI Status for all SFIs** menu to set the COI Status for each SFI listed in the lower portion of the screen, or you may select the **COI Status** for each Significant Financial Interest displayed. Select from the following COI Status options:

<table>
<thead>
<tr>
<th>No Conflict Exists</th>
<th>No financial conflict of interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential Relationship</td>
<td>The Investigator has identified a potential relationship between his/her SFIs and his or her Institutional Responsibilities</td>
</tr>
</tbody>
</table>

**Project Details** – Award #, Title, Start and End Date.
You may click **Skip Project** to move to the next project.

**Significant Financial Interest** – for each SFI, the Entity Name and description you entered previously will display.
You must enter a detailed description of the relationship of the SFI to the Project.

1. You may use the **Set COI Status for all SFIs** menu to set the COI Status for each SFI listed in the lower portion of the screen, or you may select the **COI Status** for each Significant Financial Interest displayed. Select from the following COI Status options:

<table>
<thead>
<tr>
<th>No Conflict Exists</th>
<th>No financial conflict of interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential Relationship</td>
<td>The Investigator has identified a potential relationship between his/her SFIs and his or her Institutional Responsibilities</td>
</tr>
</tbody>
</table>
2. In the text box, you must enter a detailed description of the relationship between the SFI and the specific project. If no relationship exists, add details as to why they are not related. “None” or “no relationship” are not acceptable answers.

3. When you have completed the Relationship screen for the Project and each SFI listed, click **Save & Continue**.

4. You will cycle through each project so you may enter the relationship between the SFI(s) and your projects.

5. When you have set the **COI Status** and **Relationship Details** for each of your SFIs and Projects, clicking the **Save & Continue** button will bring you to the final stage of your COI Disclosure, Certify. See the CoeusLite My COI: Create SFI Entity Certify Quick Reference card for more information.

---

### Getting help

**MIT Financial Conflicts Of Interest in Research**

**Conflict of Interest Officer**
- COI-help@mit.edu
- Questions about the Conflict of Interest Policy

**Coeus Support Team**
- kc-help@mit.edu
- CoeusLite My COI system issues and authorizations
- Include your Name, Contact information, and a brief description of the problem you are experiencing.