CoeusLite My COI: Revise Master Disclosure
Relationships

Revising the Master Disclosure 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 to be included in the disclosure will display. The list includes Proposal Number or Award #, Account #, Title, Sponsor and Award Date details.

1. Click the Continue button to complete the Relationship step for each Project. If you have previously entered relationship data (indicated by a green checkmark), it will be available for modification.

You may also click on a Proposal Number or Award # to complete the Relationship step for that specific project.

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The Financial Disclosure Relationship screen is divided into two sections:

**Project Details** – Proposal or 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 in Step 2 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 relationships 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. 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 COI Disclosure, Certify. See the CoeusLite My COI: Revise Master Disclosure Certify Quick Reference card for more information.

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**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.