Overview:

This Quick Reference Card explains the two ways Investigators and NIH/PHS Key Persons will access and answer the Proposal Certifications Questions in Kuali Coeus:

Procedure One – Accessing Proposal Disclosure via Email
Procedure Two – Accessing Proposal Disclosure via the Action List

Procedure One:

Accessing Your Proposal Certifications via Email

All Investigators and NIH/PHS Key Study Persons named on a proposal must complete Proposal Certification, which includes COI Screening Questions, before the proposal may be submitted into the routing workflow for approval.

1. You will receive an email notification with the Subject “Regarding your Involvement in Development Proposal...” The notification is triggered during proposal development in Kuali Coeus by the proposal Aggregator.

2. The email contains basic information such as PI, Lead Unit, Proposal Number, Sponsor, Deadline Date, and Title. It also contains a direct link to Certify and view proposal details.

3. Click the link to go directly to the Kuali Coeus Certification screen.

Figure 1 – Certification Link in Email
Clicking on the link will launch your default web browser and takes you to the Certification page for the specific proposal. You will be authenticated with MIT Certificates. Based on your project role, the following Certification will be presented:

**PI Certification Questions** (includes three COI Screening Questions).
**Co-PI Certification Questions** (includes three Conflict of Interest Screening Questions).
**Key Person Conflict of Interest (COI) Screening Questions** (limited to three COI Screening Questions).

4. Review the proposal information at the top of the screen, including the **Proposal Number**, **Title**, **PI**, **Lead Unit**, **Sponsor**, and Proposal **Deadline Date** (if available).

![Figure 2 - PI Proposal Certification Questions Screen](image-url)
5. If you need more information on a specific question, click the (i) link.

6. Select the Yes, No, or N/A radio buttons to indicate your response for each of the Certification questions, which supports Institutional requirements for your proposal submission. **You must select a response for each question listed.**

7. Questions **10 – 12** in the PI and Co-I Certification are Conflict of Interest (COI) Screening Questions. These same questions appear for Key Persons as Questions 1-3.

8. Click **Certify Answers** once complete.

9. If you answered Yes to any of the COI screening questions (10-12), you will be prompted to complete a COI disclosure after you submit your certification. The following pop-up will appear:

10. Click **Ok** to navigate to the Coeus Lite My COI module. Complete the disclosure and in Step 4 Certify to submit it.
11. Once your certification is complete, your user ID and a timestamp will be added to the Certification Questionnaire header within the proposal:

![Figure 6 – Questionnaire Timestamp](image)

**Procedure Two:**

**Accessing Your Proposal Certification via the Action List**

1. Click on the **Action List**, then click the **show** button to view the proposal information the **Content** box, including the PI Name, Sponsor, Title, Deadline Date, Proposal #, and Budget Totals. In the header, your name and role on the project will also display.

![Figure 7 - Action List](image)

2. To view the **questionnaire**, click on the hyperlink found in the **Content** box.
3. As previously described, select the Yes, No, or N/A radio buttons to indicate your response for each of the Certification questions, which supports Institutional requirements for your proposal submission. **You must select a response for each question listed.**

4. To remove the notification from your Action List, click on the FYI button.

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![Figure 8 - Proposal Certification Questionnaire Link](image-url)

Figure 8 - Proposal Certification Questionnaire Link

![Figure 9 - FYI Button](image-url)

Figure 9 - FYI Button
Getting Help

For questions or problems using Kuali Coeus, email the OSP Support Team at kc-help@mit.edu. Include your Name, Contact Information, and the Proposal Number.