How to Enter an Annual COI/COC Disclosure into STREAMLYNE Research

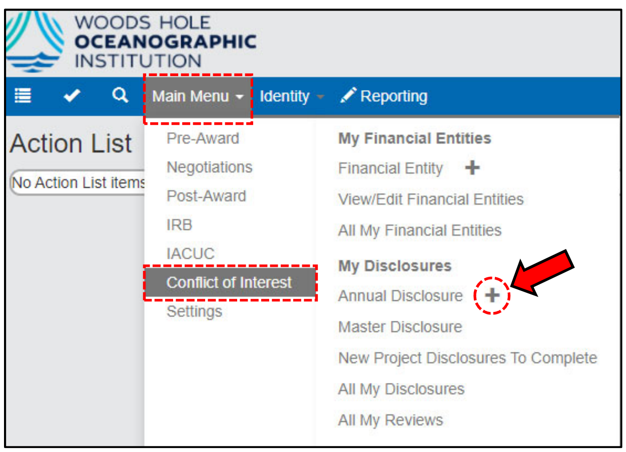
Annual Disclosures

Log into Streamlyne w/ Email Address and Password

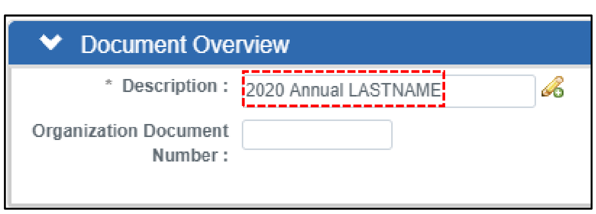
- Streamlyne Link → https://research.whoi.streamlyne.org

Streamlyne Homepage will open

- Hover over *Main Menu*
- Then hover over *Conflict of Interest*
- And click the **+** next to add *Annual Disclosure*



- In Document Overview
  - In Description – fill out this ***required** field with (**2020 Annual "LASTNAME"**)



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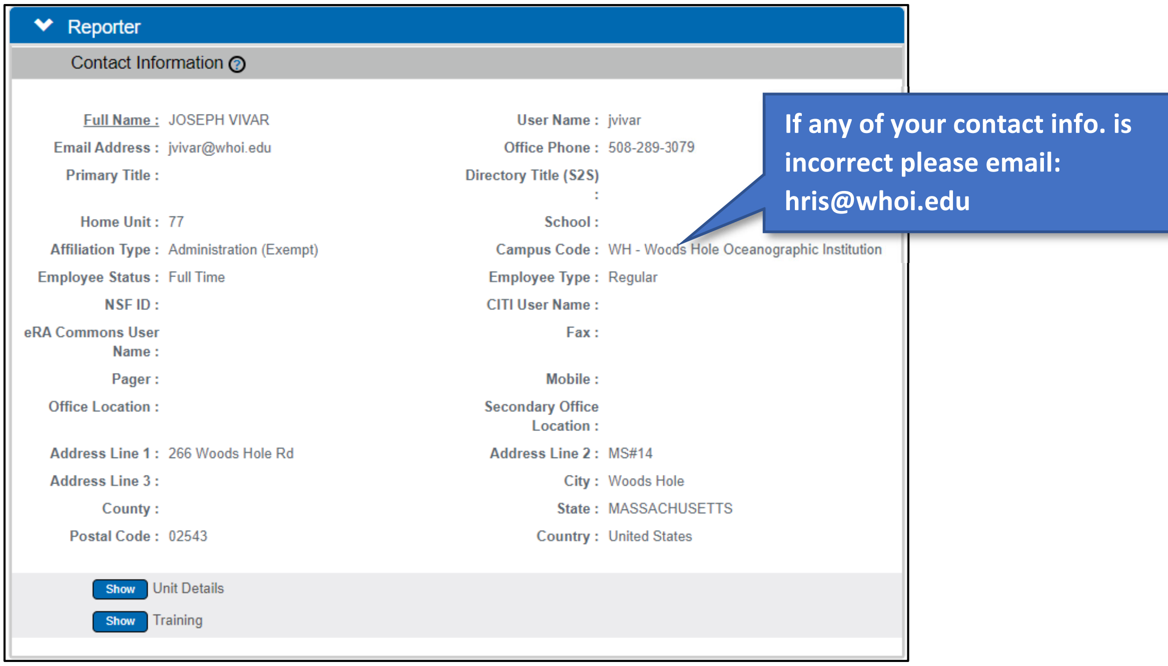
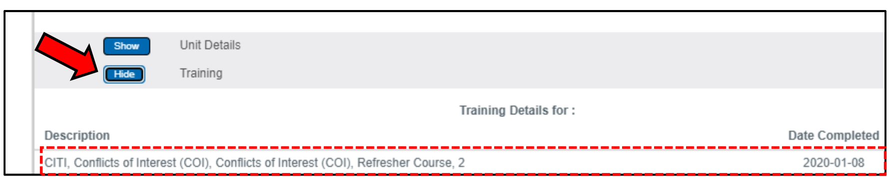
- In Reporter Tab / Contact Information – Please review your data (contact, unit, mail stop, and training data)

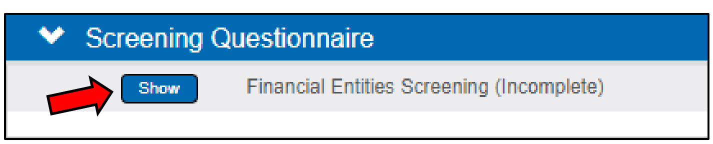


- Click on Show for Training to review if your CITI Conflict of Interest Training is up to date.

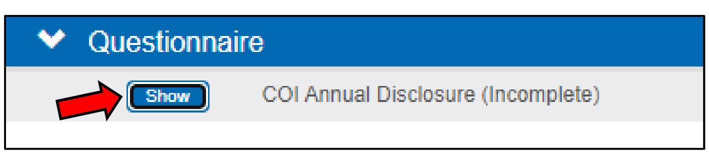


  - If you have not completed your CITI training or unsure how to please visit: https://www.whoi.edu/website/general-counsel/conflict-of-interest-training for more information on how to do so.

- In *Screening Questionnaire* click the **Show** button and answer the questions.



- In *Questionnaire* click the **Show** button and answer the questions.



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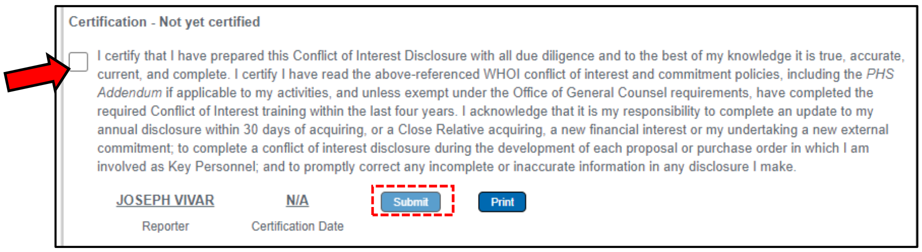
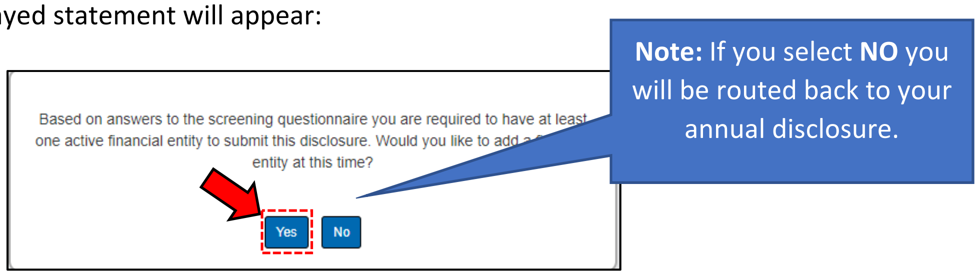
- In *Certification*, click drop-down Certification
    - Read the information above, as well as the text of, the Certification. Check the checkbox for Certification and Click Submit
    - If you have **NO** financial interests to disclose, once you 'submit' – you're done!
        - Your disclosure will be routed to your Department Administrator or a COI Administrator for review and approval.



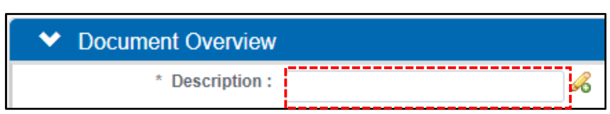
- **If you have indicated a Financial Interest in the *Screening Questionnaire*,** when you click Submit within the Certification tab you will be directed to fill out a Financial Entity Details disclosure:
    - The displayed statement will appear:



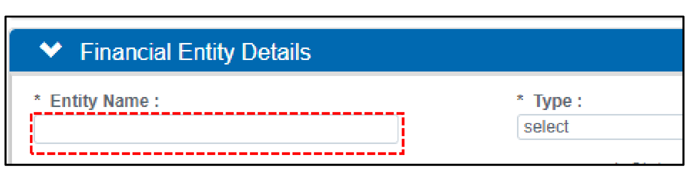
- Click **Yes** and you will be redirected to the Financial Entity Disclosure

Financial Entity Disclosure

- In *Document Overview* Section
    - In Description - fill out this * **required** field



- In *Financial Entity Details* – fill out all data (* indicates **required** field).
    - (Financial Entity Details must be provided for **each** Financial Entity – if you have more than one – you will need to fill out separate disclosures for each one.)



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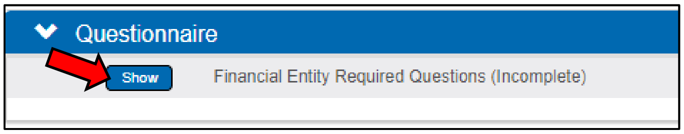
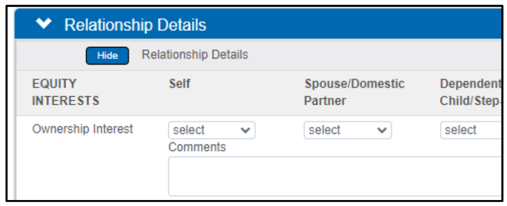
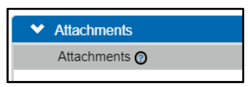
- In *Questionnaire* click the **Show** button and answer all the questions.



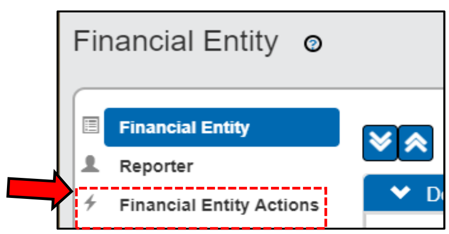
- In *Relationship Details* – fill out all applicable data
  - (if none, there is no information the Reporter needs to provide for Relationship Details; negative or N/A responses are not required)



- In *Attachments* add any necessary documentation (e.g., a consulting agreement, or other documentation related to the interest you are disclosing).



- When the Reporter has completed the Financial Entity section, scroll to the bottom and click **Save**
- Navigate to the top left of the screen and click on **Financial Entity Actions**



- Click the **Submit** button on the bottom of the screen to finalize the disclosure, which will be routed for review as was the Annual Disclosure.

- You will be returned to your Annual Disclosure
- Now you will be able to complete the certification steps that was previously unavailable and complete submission of your Annual Disclosure.

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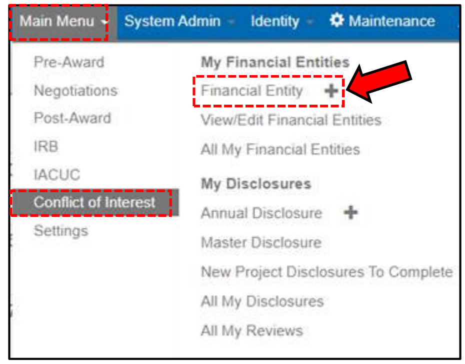
Note: If you have multiple interests with different financial entities you will need to add an additional Financial Entity disclosure for each interest.



- Navigate and hover over the Main Menu (top left of browser) & Click
- Hover on Conflict of Interest from drop-down
- And next navigate to Financial Entity and click on the + sign to add an additional financial entity.
    - Follow ***FE Disclosure*** steps above to complete
    - Repeat these three steps as necessary
- A notification email will be sent to your Dept. admin (or COI admin) once each Financial Entity disclosure is submitted.