

Annual Disclosures

Log into Streamlyne w/ Email Address and Password

• Streamlyne Link → <u>https://research.whoi.streamlyne.org</u>



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

✤ Document Overview		
* Description :	2020 Annual LASTNAME	4
Organization Document Number :		





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

Contact Information 🕥			
<u>Full Name :</u> JOSEPH VIVAR Email Address : jvivar@whoi.edu Primary Title : Home Unit : 77	User Name : Office Phone : Directory Title (S2S) : School :	jvivar 508-289-3079 incorr hris@	of your contact info. is ect please email: whoi.edu
Affiliation Type : Administration (Exempt)	Campus Code :	WH - Woods Hole Oceanographic Instit	ution
Employee Status : Full Time	Employee Type :	Regular	1 I
NSF ID :	CITI User Name :		
eRA Commons User Name :	Fax :		
Pager :	Mobile :		
Office Location :	Secondary Office Location :		
Address Line 1: 266 Woods Hole Rd	Address Line 2 :	MS#14	
Address Line 3 :	City :	Woods Hole	
County :	State :	MASSACHUSETTS	
Postal Code: 02543	Country :	United States	
Show Unit Details			
Show Training			

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

CITL Conflicts of Interest (COI) Conflicts of Interest (COI) Refresher Course 2		2020-01-08	
Descri	intion	training Details for	Date Completed
		Training Datails for	
	Hide	Training	
	Show	Unit Details	

- If you have not completed your CITI training or unsure how to please visit: 0 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.







- In Certification, click drop-down
 - 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.

Certification - Not yet certified			
I certify that I have prepared this Conflict of Interest Disclosure with all due diligence and to the best of my knowledge it is true, accurate current, and complete. I certify I have read the above-referenced WHOI conflict of interest and commitment policies, including the <i>PHS Addendum</i> if applicable to my activities, and unless exempt under the Office of General Counsel requirements, have completed the required Conflict of Interest raining within the last four years. I acknowledge that it is my responsibility to complete an update to my annual disclosure within 30 days of acquiring, or a Close Relative acquiring, a new financial interest or my undertaking a new external commitment, to complete a conflict of interest disclosure during the development of each proposal or purchase order in which I am involved as Key Personnel: and to promotive correct any inaccurate information in any disclosure.			
JOSEPH VIVAR N/A Submit Print Reporter Certification Date			

- 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

✓ Document Overview	
* Description :	<u></u>

- 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.)

✤ Financial Entity Details	
* Entity Name :	* Type :
	select
i	





• 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)

✤ Relationship Details			
Hide Relationship Details			
EQUITY INTERESTS	Self	Spouse/Domestic Partner	Dependent Child/Step
Ownership Interest	select V Comments	select V	select

• 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.

X	Document was successfully saved.	②
	,,,,,,	indicates required field
Data Validation		
Route Log		
Send Notifica	tion Return to Disclosure Submit Save	Reload

- 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.





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
 - 0 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.



