

Annual Disclosures

Links to complete documentation

The initial instructions sent out by the Office of General Counsel stated that the application and documentation were only available while on WHOI's network.

This was in error. Both websites (for the form and the documentation) do not require VPN to access.

The documentation can be found on the Office of General Counsel site in the related files section here:

<https://www.who.edu/website/general-counsel/conflict-of-interest-and-commitment>

The link for the web platform where you fill in the Conflict of Interest/Commitment is also not behind the firewall.

<https://research.who.streamlyne.org>

Reminders

Streamlyne sends email reminders to individuals who have not completed their Annual Disclosures. The deadline for filing the Annual Disclosure is January 31. Reminders are sent 25 days before, 7 days before, and the day before the deadline.

When one logs into Streamlyne after a reminder email was received, the Action List will contain an FYI item reminding you to complete your Annual Disclosure.

To clear the FYI item from your Action List:

1. Click Show
2. Click FYI

The screenshot shows the 'Action List' interface. At the top, there is a table with columns: Action, Id, Type, Title, Route Status, Delegator, and Date Created. A single row is visible with the following data: Action: FYI (with a red circle and '1' next to it), Id: 9700, Type: Streamlyne Research Notification, Title: Annual Review Reminder, Route Status: FINAL, Delegator: (empty), Date Created: 11:25 PM 01/06/2022. Below the table, there is a 'Show' button (with a red circle and '1' next to it) and a 'Take Action' button. Below the 'Take Action' button, it says 'One item found.' To the right of the 'Action List' table, there is a detailed view of the selected item. It shows: Id: 2130, From: notsys, Recipients: dtrewcrist, Channel: Notification Channel, Producer: Notification System, Type: FYI, Priority: Normal, Send Date: 2022-01-06T23:25:06.000-05:00, Removal Date: none. Below this, the Title is 'Annual Review Reminder' and the Content is 'This is a reminder that your Annual Disclosure is due on 2022-01-31.' At the bottom of the detailed view, there is an 'FYI' button (with a red circle and '2' next to it).

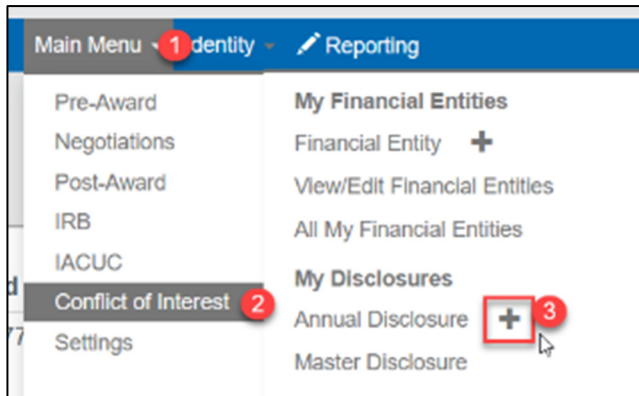
Entering an Annual Disclosure

Log in to this link using your full WHOI email address and password:

<https://research.whoistreamlyne.org>

Once logged in, you will do the following steps to start your new Annual Disclosure.

1. Click on Main Menu
2. Click on Conflict of Interest
3. Click the **Plus Sign** next to Annual Disclosure to add a New Annual Disclosure



(Plus sign = Add New)

After you complete the two questionnaires and ensure any potential conflicts are reported, you will be ready to submit.

Refer to the full documentation and instructions on the Office of General Counsel website for more information.

SAVE vs. SUBMIT

SAVE = Stop work now and return later to finish. The Save button is at the bottom of the webpage below all the panels.

SUBMIT = Send the completed Disclosure into the Approval workflow.

The Submit button is found on the **Certification panel** and becomes available after the checkbox for the Certification statement is checked.

- **Remember:** Your Disclosure is not complete until you have clicked 'Submit'.

