

How to Enter an Annual COI/COC Disclosure into



Annual Disclosures

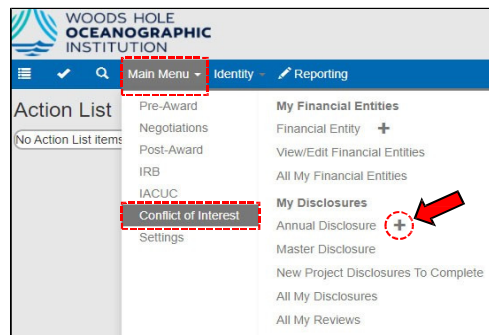
Log into Streamlyne w/ Email Address and Password

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

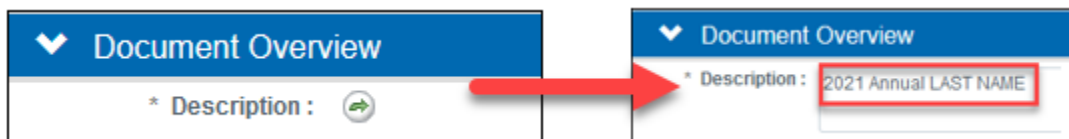


Streamlyne Homepage will open

- Hover over *Main Menu*
- Then hover over *Conflict of Interest*
- Click the + (plus sign) to the right of *Annual Disclosure* to Add a disclosure



- **NEW!** The required Description in the Document Overview will automatically populate when the disclosure is saved. The format is 'Reporting Year Annual Last Name' (e.g., **2021 Annual Smith**).



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

▼ Reporter

⊙ Contact Information

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

If any of your contact info. is incorrect please email: hris@whoi.edu

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

Show Unit Details

Hide Training

Training Details for :

Description	Date Completed
CITI, Conflicts of Interest (COI), Conflicts of Interest (COI), Refresher Course, 2	2020-01-08

- 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* for Financial Entities click the **Show** button and answer the questions.

▼ Screening Questionnaire

Show Financial Entities Screening (Incomplete)

- In *Questionnaire* for the COI Annual Disclosure click the **Show** button and answer the questions.

▼ Questionnaire

Show COI Annual Disclosure (Incomplete)

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- In *Certification*, click drop-down
 - Read the information above, as well as the text of, the Certification.
 1. Check the checkbox for Certification
 2. Click Submit

- If you have **NO financial interests and no new or modified financial entities 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.

Financial Interests and Entities on the Annual Disclosure

- If you entered Financial Entities previously, they display in the Project & Financial Entity Relationships bar. Review these to make sure all your Financial Interests and Entities are present and accurate for the reporting year.

Entity Name	Entity Number
<input type="button" value="Show"/> Company I volunteer for	1000000075
<input type="button" value="Show"/> gordon consulting	1000000158

- If you have indicated a Financial Interest in the Screening Questionnaire but have no entered Financial Entities, 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:

Note: If you select **NO** you will be routed back to your annual disclosure.

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

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Financial Entity Disclosure

- In *Document Overview* Section
 - In Description - fill out this * **required** field.
Suggested: use your Last Name and the Entity Name

A screenshot of the 'Document Overview' section. It features a blue header with a dropdown arrow and the text 'Document Overview'. Below the header, there is a label '* Description : ' followed by a red dashed rectangular box representing the input field. To the right of the box is a small icon of a pencil and a checkmark.

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


A screenshot of the 'Questionnaire' section. It has a blue header with a dropdown arrow and the text 'Questionnaire'. Below the header, there is a blue button labeled 'Show' with a red arrow pointing to it from the left. To the right of the button is the text 'Financial Entity Required Questions (Incomplete)'.

- 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)

A screenshot of the 'Relationship Details' section. It has a blue header with a dropdown arrow and the text 'Relationship Details'. Below the header, there is a 'Hide' button and the text 'Relationship Details'. Below that is a table with columns: 'EQUITY INTERESTS', 'Self', 'Spouse/Domestic Partner', and 'Dependent Child/Step'. The 'Ownership Interest' row has three dropdown menus labeled 'select' and a 'Comments' text area below it.

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

A screenshot of the 'Attachments' section. It has a blue header with a dropdown arrow and the text 'Attachments'. Below the header, there is a grey button labeled 'Attachments' with a circular icon to its right.

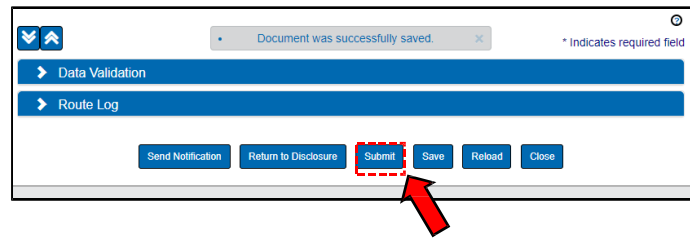
- When the Reporter has completed the Financial Entity section, scroll to the bottom and click 
- Navigate to the top left of the screen and click on **Financial Entity Actions**

A screenshot of the 'Financial Entity' menu. It has a grey header with the text 'Financial Entity' and a circular icon. Below the header, there is a blue button labeled 'Financial Entity'. Below that is a grey button labeled 'Reporter' with a person icon. Below that is a red dashed rectangular box around a menu item labeled 'Financial Entity Actions' with a lightning bolt icon. A red arrow points to this menu item from the left.

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- 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 step that was previously unavailable and complete submission of your Annual Disclosure

Adding additional Financial Entities

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
- Next navigate to Financial Entity and click on the + (plus sign) to add an additional financial entity.
 - Follow **Financial Entity Disclosure** steps above to complete
 - Repeat these three steps as necessary
- A notification email will be sent to your Department Administrator (or COI Administrator) once each Financial Entity disclosure is submitted.

