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)

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

- In Questionnaire for the COI Annual Disclosure 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.
  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.

  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

- 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.

- 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
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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.