Overview:

This Quick Reference Card explains the two ways Investigators and NIH/PHS Key Persons will access and answer the Proposal Certifications Questions in Kuali Coeus:

- **Procedure One** – Accessing Proposal Disclosure via Email
- **Procedure Two** – Accessing Proposal Disclosure via the Action List

Procedure One:

**Accessing Your Proposal Certifications via Email**

All Investigators and NIH/PHS Key Study Persons named on a proposal must complete Proposal Certification, which includes COI Screening Questions, before the proposal may be submitted to route for internal approvals.

1. You will receive an email notification with the Subject “**Regarding your Involvement in Development Proposal...**” The notification is triggered during proposal development in Kuali Coeus by the proposal Aggregator.

2. The email contains basic information such as PI, Lead Unit, Proposal Number, Sponsor, Deadline Date, and Title. It also contains a direct link to **Certify** and view proposal details.

3. Click the **link** to go directly to the **Kuali Coeus Certification** screen.

   ![Figure 1 – Certification Link in Email](image_url)

Hello,

You have been named as a Principal Investigator (PI), Co-Investigator (Co-I) or Senior Proposal Number: 35017
Sponsor: DOE - Idaho Falls
Title: Hypothesis Is The Best
Principal Investigator: Carloib, Ian C
Administrator preparing proposal: Ian Carloib

In order to meet federal requirements and to ensure objectivity, you and proceed to a short series of questions; these questions constitute the PI Certification. The proposal cannot begin routing for approval until all certifications are complete.

You will be asked to answer several short (yes/no) questions about the proposal and three screening questions related to conflict of interest. If the answers to the screening questions do not indicate a need for additional information, your certification and disclosure are complete. If additional information is needed, you will be directed to the My COI module of Coeus Lite to complete a full financial disclosure related to this proposal.

You must have an MIT registration to complete this action. [http://ajax.mit.edu/certificates](http://ajax.mit.edu/certificates)

If you have questions, please contact the administrator who is preparing this proposal.

Thank you.

Kuali Coeus and Coeus Lite require an MIT personal web certificate to log in.
Clicking on the link will launch your default web browser and take you to the Certification page for the specific proposal. You will be authenticated with MIT Certificates. Based on your project role, the following Certification will be presented:

**PI Certification Questions** (includes three COI Screening Questions).

**Co-PI Certification Questions** (includes three Conflict of Interest Screening Questions).

**Key Person Conflict of Interest (COI) Screening Questions** (limited to three COI Screening Questions).

4. Review the proposal information at the top of the screen, including the Proposal Number, Title, PI, Lead Unit, Sponsor, and Proposal Deadline Date (if available).
5. If you need more information on a specific question, click the (i) link.

6. Select the **Yes**, **No**, or **N/A** radio buttons to indicate your response for each of the Certification questions, which supports Institutional requirements for your proposal submission. **You must select a response for each question listed.**

7. Questions **10 – 12** in the PI and Co-I Certification are Conflict of Interest (COI) Screening Questions. These same questions appear for Key Persons as Questions 1-3.

8. Click **Certify Answers** once complete.

9. If you answered **Yes** to any of the COI screening questions (10-12), you will be prompted to complete a COI disclosure after you submit your certification. The following pop-up will appear:

10. Click **Ok** to navigate to the Coeus Lite My COI module. Complete the disclosure and in Step 4 **Certify** to submit it.

11. Once your certification is complete, your user ID and a timestamp will be added to the Certification Questionnaire header within the proposal:
Procedure Two:

Accessing Your Proposal Certification via the Action List

1. Click on the Action List, then click the show button to view the proposal information the Content box, including the PI Name, Sponsor, Title, Deadline Date, Proposal #, and Budget Totals. In the header, your name and role on the project will also display.

2. To view the questionnaire, click on the hyperlink found in the Content box.
3. As previously described, select the **Yes**, **No**, or **N/A** radio buttons to indicate your response for each of the Certification questions, which supports Institutional requirements for your proposal submission. You must select a response for each question listed.

4. To remove the notification from your **Action List**, click on the **FYI** button.

**Figure 7 - Proposal Certification Questionnaire Link**

**Figure 8 - FYI Button**

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**Getting Help**

For questions or problems using Kuali Coeus, email the RAS Support Team at [ra-help@mit.edu](mailto:ra-help@mit.edu). Include your **Name**, **Contact Information**, and the **Proposal Number**.