

## 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.

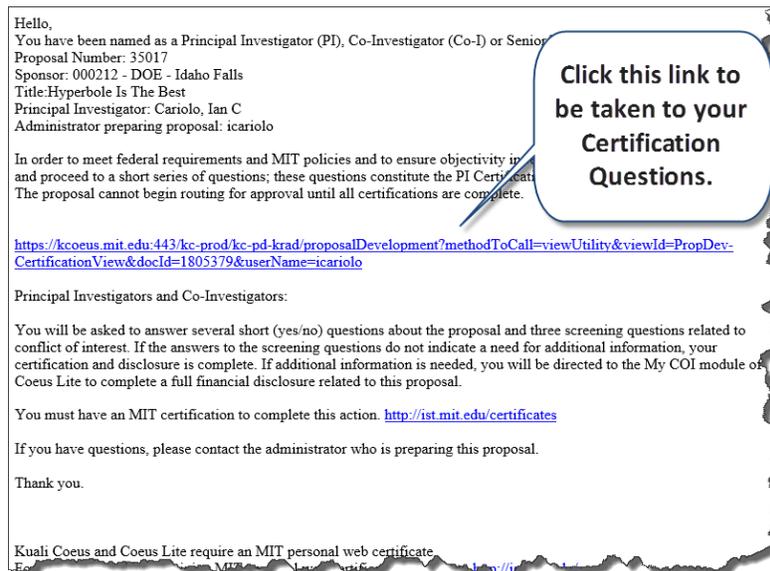


Figure 1 – Certification Link in Email

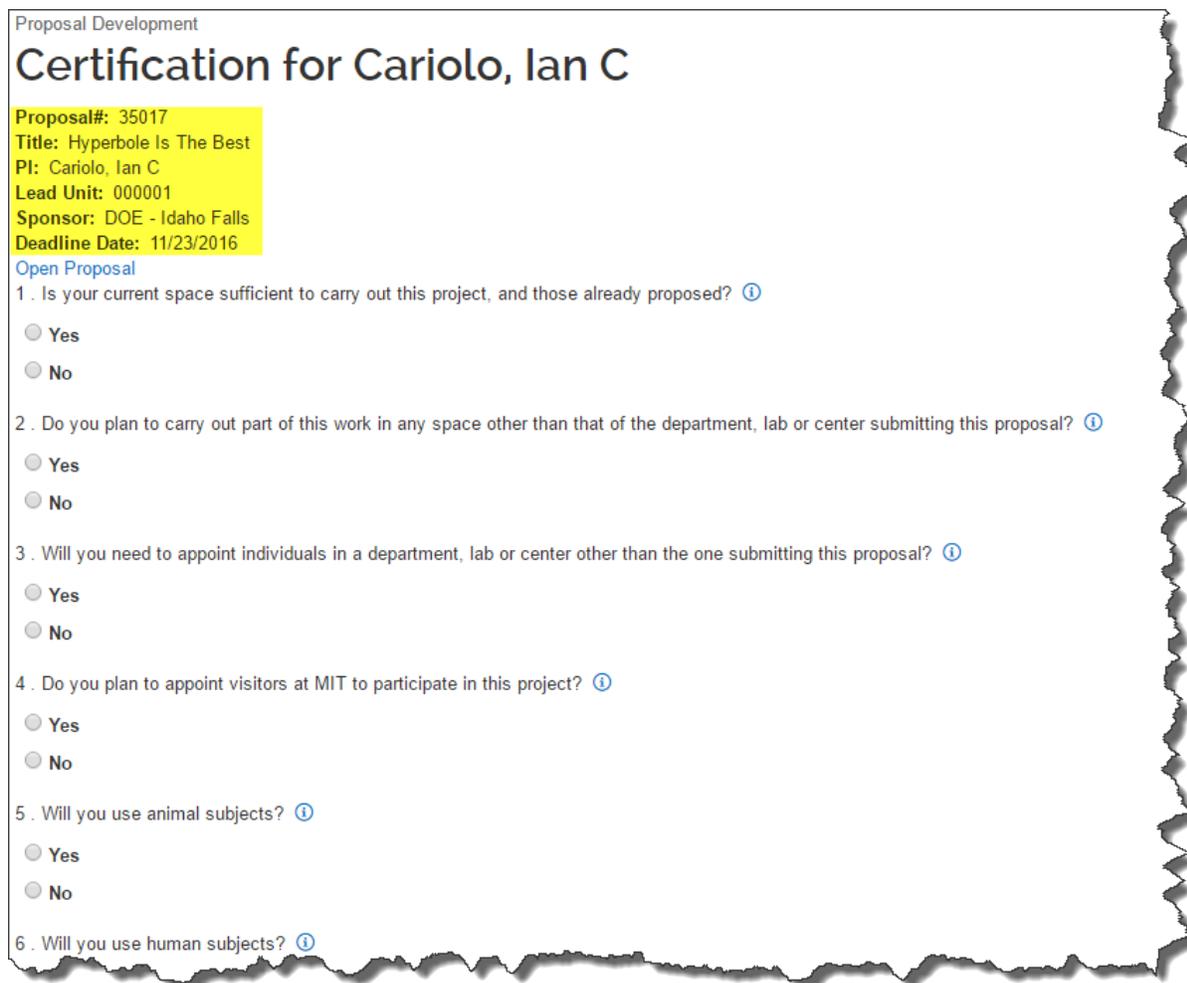
Clicking on the link will launch your default web browser and take you to the Certification page for the specific proposal. You will be authenticated with MIT Certificates. Based on your project role, the following Certification will be presented:

**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).



Proposal Development

## Certification for Cariolo, Ian C

Proposal#: 35017  
Title: Hyperbole Is The Best  
PI: Cariolo, Ian C  
Lead Unit: 000001  
Sponsor: DOE - Idaho Falls  
Deadline Date: 11/23/2016

[Open Proposal](#)

1. Is your current space sufficient to carry out this project, and those already proposed? ⓘ  
 Yes  
 No
2. Do you plan to carry out part of this work in any space other than that of the department, lab or center submitting this proposal? ⓘ  
 Yes  
 No
3. Will you need to appoint individuals in a department, lab or center other than the one submitting this proposal? ⓘ  
 Yes  
 No
4. Do you plan to appoint visitors at MIT to participate in this project? ⓘ  
 Yes  
 No
5. Will you use animal subjects? ⓘ  
 Yes  
 No
6. Will you use human subjects? ⓘ

Figure 2 - PI Proposal Certification Questions Screen

5. If you need more information on a specific question, click the (i) link.

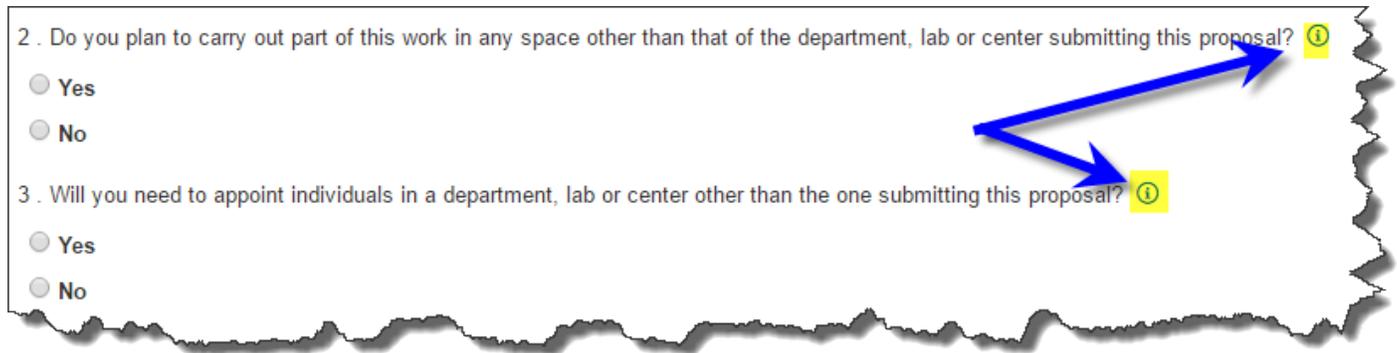


Figure 3 - Certification Questions Info Button

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:

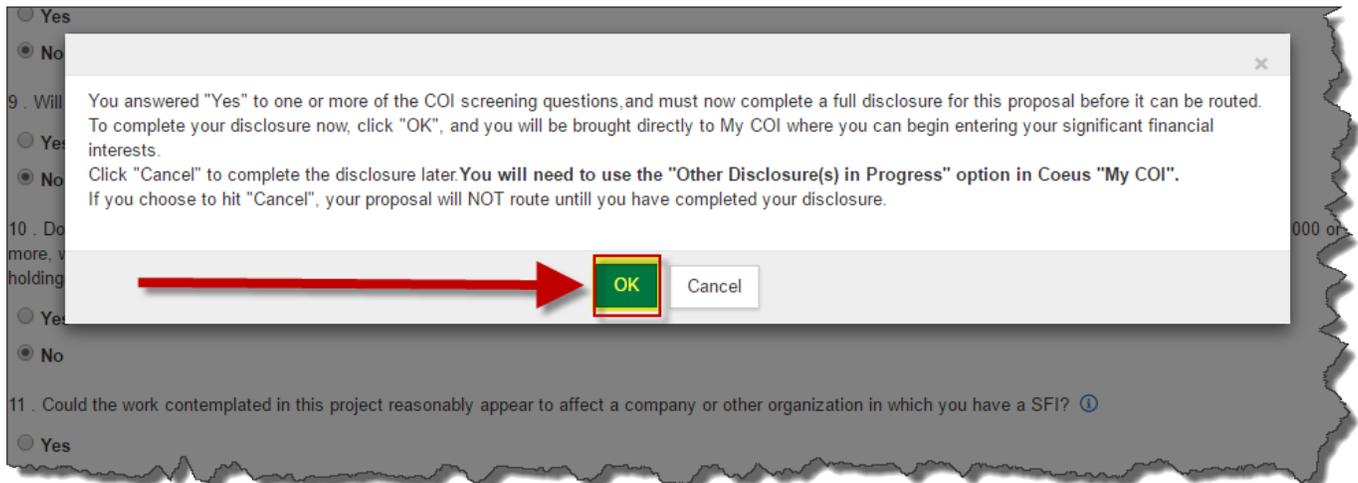


Figure 4 - My COI Module

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:

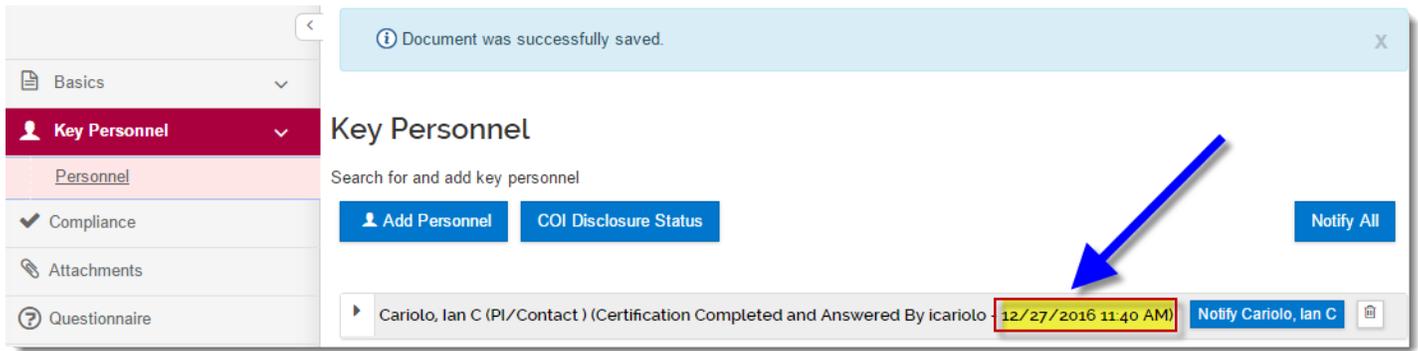


Figure 5 – Questionnaire Timestamp

## 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.

Action List | [Outbox](#)

987 items retrieved, displaying 1 to 200.[First/Prev] 1, 2, 3, 4, 5 [Next/Last]

	<u><a href="#">Id</a></u>	<u><a href="#">Type</a></u>	<u><a href="#">Title</a></u>	<u><a href="#">Route Status</a></u>	<u><a href="#">Action Requested</a></u>	<u><a href="#">Delegator</a></u>	<u><a href="#">Date Created</a></u>	<u><a href="#">Group Request</a></u>	<u><a href="#">Actions</a></u>	<u><a href="#">Lo</a></u>
<a href="#">show</a>	1847429	KC Notification	All Proposal Persons Certification Completed for 35017	FINAL	FYI		11:40 AM 12/27/2016		FYI ▼	
<a href="#">show</a>	1847397	KC Notification	Regarding your involvement in Development Proposal Hyperbole Is The Best	FINAL	FYI		11:19 AM 12/27/2016		NONE ▼	
<a href="#">show</a>	1847394	KC Notification	Regarding your involvement in Development Proposal Hyperbole Is The Greatest	FINAL	FYI		11:18 AM 12/27/2016		NONE ▼	
	1845996	Award Budget Document	Award Budget Document -	EXCEPTION, Submitted	COMPLETE		04:40 PM 12/22/2016	KcAdmin		
	1845970	Award Budget Document	Award Budget Document -	EXCEPTION, Submitted	COMPLETE		04:34 PM 12/22/2016	KcAdmin		
	1845856	KC Protocol Review	KC Protocol Review - Johnson/Protocol# 1612784141	ENROUTE	APPROVE		03:13 PM 12/22/2016			
	1845607	KC Protocol Review	KC Protocol Review - Alvarez Felix/Protocol# 1612793005	ENROUTE	APPROVE		10:29 AM 12/22/2016			

Figure 6 - Action List

2. To view the **questionnaire**, click on the hyperlink found in the **Content** box.

	<b>ID</b>	<b>Type</b>	<b>Title</b>	<b>Route</b>
▼ hide	1847397	KC Notification	Regarding your involvement in Development Proposal Hyperbole Is The Best	FINAL

**Channel:** KC Notification Channel  
**Producer:** Notification System  
**Type:** FYI  
**Priority:** Normal  
**Send Date:** 2016-12-27T11:19:52.000-05:00  
**Removal Date:** none

**Title:** Regarding your involvement in Development Proposal Hyperbole Is The Best  
**Content:**  
Hello,  
You have been named as a Principal Investigator (PI), Co-Investigator (Co-I) or Senior/Key Person on this proposal:  
Proposal Number: 35017  
Sponsor: 000212 - DOE - Idaho Falls  
Title:Hyperbole Is The Best  
Principal Investigator: Cariolo, Ian C  
Administrator preparing proposal: icariolo

In order to meet federal requirements and MIT policies and to ensure objectivity in research, please click the link below and proceed to a short series of questions; these questions constitute the PI Certification and Disclosure for this proposal. The proposal cannot begin routing for approval until all certifications are complete.

<https://kcoeus.mit.edu:443/kc-prod/kc-pd-krad/proposalDevelopment?methodToCall=viewUtility&viewId=PropDev-CertificationView&docId=1805379&userName=icariolo>

Principal Investigators and Co-Investigators:

Click this link to be taken to your Certification Questions.

Figure 7 - Proposal Certification Questionnaire Link

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

▼ hide	1847448	KC Notification	Regarding your involvement in Development Proposal Hyperbole Is The Best	FINAL	FYI	12:01 PM 12/27/2016
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**Administrator preparing proposal: icariolo**

In order to meet federal requirements and MIT policies and to ensure objectivity in research, please click the link below and proceed to a short series of questions; these questions constitute the PI Certification and Disclosure for this proposal. The proposal cannot begin routing for approval until all certifications are complete.

<https://kcoeus.mit.edu:443/kc-prod/kc-pd-krad/proposalDevelopment?methodToCall=viewUtility&viewId=PropDev-CertificationView&docId=1805379&userName=icariolo>

**Principal Investigators and Co-Investigators:**

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 is 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 certification to complete this action. <http://ist.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.  
For information about obtaining MIT personal web certificate please go to <http://ist.mit.edu/certificates>

**FYI**

Figure 8 - FYI Button

## 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**.