

**COI Procedure for Collaborators External to UNM Central/Branch Campuses:  
Streamlyne Edition**

The following guidance is provided for department administrators, Principal Investigators and faculty research support officers. Completion and verification of COI disclosures for collaborators external to UNM’s Central/Branch Campuses (i.e., HSC co-investigators), as well as collaborators external to UNM (i.e., from other institutions) must be completed prior to the OSP proposal review appointment.

**HSC co-investigators, key personnel:**

1. Do **not** add HSC personnel to Streamlyne.
2. Email [petreel@unm.edu](mailto:petreel@unm.edu) (Linda Mayo) and [ndonart@salud.unm.edu](mailto:ndonart@salud.unm.edu) (Nathan Donart) - the following information:
  - a. Full name
  - b. Email address
  - c. Project Title
  - d. Streamlyne PD record number
  - e. Role on project (co-I, key personnel)
3. Nathan will initiate COI disclosure process in Click at HSC and provide confirmation of disclosure submission via email within two business days.
4. This email serves as the record of COI compliance. Upload in Streamlyne for the record.
5. **Once the Project Disclosure is successfully completed by HSC personnel, the proposal can be submitted to the Sponsor.**
6. For DOE funded research, the COI office will send HSC personnel the DOE assurance form for signature.

**Non-UNM co-investigators, key personnel:**

1. Request Streamlyne account for external user - [LINK](#).
2. SL account information will be emailed to user with cc: to requestor within 3 business days. If urgent, email Valerie at [vflint@unm.edu](mailto:vflint@unm.edu) after submitting request.
3. Add external user to Proposal personnel record in Streamlyne:
  - a. Key Personnel tab >> using the Internal User Name, click the spyglass icon and enter their last name or email address into the corresponding field; click “Search”; select the correct person and assign a Proposal Role using the dropdown.



- b. User completes COI Project disclosure in Streamlyne. Tipsheet: <https://researchcompliance.unm.edu/assets/docs/2024-project-disclosure-tipsheet.pdf>
4. **Once the Project Disclosure is successfully submitted, the proposal can be submitted to the Sponsor.**

5. Streamlyne Report “Streamlyne Project Disclosures by Disclosure and Disposition Statuses-VSD-3760” will note one of the following:
  - a. Submitted for review
  - b. Auto Approved
  - c. Disposition Finalized
  - d. No Conflict