



**CASE WESTERN RESERVE
UNIVERSITY**
Office of Research and
Technology Management

COI User Training

Fall 2023

Sparta Dashboard

The SpartaCOI dashboard can be accessed at spartacoi.case.edu.

Notice that clickable question marks will display guidance if clarification is needed.

The screenshot shows the SpartaCOI dashboard interface. At the top, there is a navigation bar with the following items: Dashboard, Admin, Agreements, **COI** (circled in red), and Grants. The user is logged in as Luke Wieszczyk, and there is a 'Switch User' button. Below the navigation bar, the main content area is titled 'My Inbox' and contains a table of items. The table has columns for ID, Name, Date Created, Date Modified, State, and Coordinator. One item is listed: DP00000011, Disclosure Profile for Luke Wieszczyk, created on 7/7/2023 2:00 AM and modified on 10/13/2023 11:41 AM, with a state of 'Action Required' and coordinator 'Luke Wieszczyk'. A red circle highlights a question mark icon in the 'Filter by ID' dropdown menu. The page footer includes the Case Western Reserve University logo and name.

Staging

HURON RESEARCH SUITE

Hello, Luke Wieszczyk

Switch User

Dashboard Admin Agreements **COI** Grants

Page for Luke Wieszczyk

Create

Recently Viewed

Recent Pinned

No pinned item to display.

My Inbox

My Reviews

Filter by ID + Add Filter X Clear All

ID	Name	Date Created	Date Modified	State	Coordinator
DP00000011	Disclosure Profile for Luke Wieszczyk	7/7/2023 2:00 AM	10/13/2023 11:41 AM	Action Required	Luke Wieszczyk

1 items

page 1 of 1

25 / page

Help



COI Information

The “Action Required” button will notify if there is anything immediate that needs to be addressed and what the status of your COI disclosure is.

To start or edit your COI disclosure click the edit disclosure profile button highlighted below.

The screenshot shows the HURON RESEARCH SUITE interface. The user is logged in as Luke Wieszczyk. The navigation menu includes Dashboard, Admin, Agreements, COI, Grants, Reports, Meetings, and Help Center. The current page is the COI Disclosure Profile for Luke Wieszczyk. A yellow button labeled "Action Required" is highlighted with a red circle. Below it, a table titled "Instruction Center" lists two action items with their reasons. A red circle highlights the "Edit Disclosure Profile" button at the bottom of the page.

Staging

HURON RESEARCH SUITE

Hello, Luke Wieszczyk ▾

Switch User

Dashboard Admin Agreements COI Grants

Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Disclosures > Disclosure Profile for Luke Wieszczyk

Help

Action Required

Disclosure profile last completed: 8/22/2023

Complete Disclosure Profile Update

Action Required	Reason
Click "Edit Disclosure Profile" to access the form. Review or edit your disclosure information. When all disclosure information is current and accurate, click " Complete Disclosure Profile Update " to finalize.	Discloser manually updated the disclosure profile
Click "Edit Disclosure Profile" to access the form. Go to the Instructions and Policies page to review training and education information. Check the box to certify that the information has been accepted.	Discloser's training is out of date

Edit Disclosure Profile

Management Plan Status Last Accepted Date Plan Monitors



COI Policies & Training

Review the training and education points on the policy page. Copies of the COI policy and other pertinent information can be found below.

Click certify at the bottom and continue to complete the rest of your disclosure profile.

****NOTE**** any question marked by the red asterisk is a required question and must be answered.

The screenshot shows the 'HURON RESEARCH SUITE' interface. The user is logged in as 'Hello, Luke Wieszczyk'. The page title is 'Editing: DP00000011'. The left sidebar contains a menu with 'Instructions and Policies' selected, along with 'Entity Disclosure Information', 'Additional Information', and 'Complete Disclosure Profile'. The main content area is titled 'Instructions and Policies' and includes a 'Training and Education' section with a bulleted list of requirements. Below this, there is a 'For more information:' section with links to 'COI Policy' and 'COI Website', and contact information for COI Staff. A 'Training documents:' section indicates no items are displayed. The 'Date that you completed your COI Training:' is 3/31/2023. At the bottom, there is a certification statement: '1. * I certify that I have read and understood the COI education materials presented to me: [radio button]'. The radio button is circled in red. At the bottom right, there are buttons for 'Exit', 'Save', and 'Continue'.



Financial Interests

Financial Interests or Outside Activities

If you need clarity on any of the terminology on this page click the help text button (blue question mark) for clarification.

Click the add button if you have an entity to disclose.

HURON RESEARCH SUITE

Hello, Luke Wieszczyk

Validating Compare

Editing: DP00000011

Go to forms menu Print Help

Entity Disclosure Information

1. * Do you, your spouse/domestic partner, and/or dependent living in your household have any interests with an outside entity?

Yes No [Clear](#)

2. Entity disclosures:

[+ Add](#)

Entity	Foreign Entity?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
There are no items to display						

Exit Save Continue



Financial Interests Cont.

Add Disclosure

Entity Disclosure Information

▼ General Information

1. * **Entity:** ?

...

or

If you cannot find the entity in the above list, enter the details here:
[None] ...

2. * **Relation to discloser:** ?

Self
 Spouse
 Dependent Child

3. * **Disclosure types:**

Name	Description
<input type="checkbox"/> Equity	Stock, Stock Options, Ownership Interest or Venture Capital
<input type="checkbox"/> Consulting or Other Professional Services	Advisory or expert witness services
<input type="checkbox"/> Editorial Services	Journal services, scientific editor services
<input type="checkbox"/> Intellectual Property Rights	Patent, Copyright, License, or Royalties paid directly to individual
<input type="checkbox"/> Sponsored Travel	Foreign or domestic travel which is paid on behalf of the individual and not reimbursed to the individual
<input type="checkbox"/> Board Service	Board of Directors, Board of Trustees, Scientific Advisory Board, other fiduciary role
<input type="checkbox"/> Outside Employment	Employment external to CWRU
<input type="checkbox"/> Other Appointments	Foreign or domestic; Compensated or uncompensated; Academic, professional, or institutional appointments; Full-time, part-time, visiting, adjunct, honorary or voluntary
<input type="checkbox"/> Prizes and Honoraria	Speaking compensation, prizes, unpaid academic, professional, or institutional appointments with a domestic or foreign entity (e.g. Nobel Prize, Honorary Degrees, full-time, part-time, visiting, adjunct, honorary or voluntary etc.)

4. * **Do you (or your spouse/dependent other) make business or purchasing decisions on behalf of CWRU related to this entity:**

Yes No [Clear](#)

* Required

OK OK and Add Another Cancel

Select the entity from the list provided.

In the box, start typing the name of the entity, and select the entity from the list of results. If you do not see the entity in the list, you can add an entity using the ellipsis (...) button provided below.

Select the individual(s) who have a relationship with the above entity.

Note: You can select more than one item at a time.

When choosing the disclosure type(s) additional information will be needed below regarding each disclosure type



Additional Information

Foreign Entity

Select “yes” if you receive payments or in-kind support from a foreign entity. If you have an agreement with a foreign entity that CWRU or one of CWRU’s hospital affiliates has negotiated, you should select “no”.

Foreign Government Talent Recruitment Program

A foreign government talent recruitment program is a program sponsored by a foreign government to recruit faculty, researchers, or students to support the sponsoring country’s interests. These programs often incentivize activities that are contrary to regulations, policies, and core research values.

The screenshot shows the 'HURON RESEARCH SUITE' interface. The user is logged in as 'Hello, Luke Wieszczyk'. The current form is titled 'Editing: DP00000011'. The left sidebar contains navigation options: 'Instructions and Policies', 'Entity Disclosure Information', 'Additional Information' (highlighted), and 'Complete Disclosure Profile'. The main content area is titled 'Additional Information' and contains three questions:

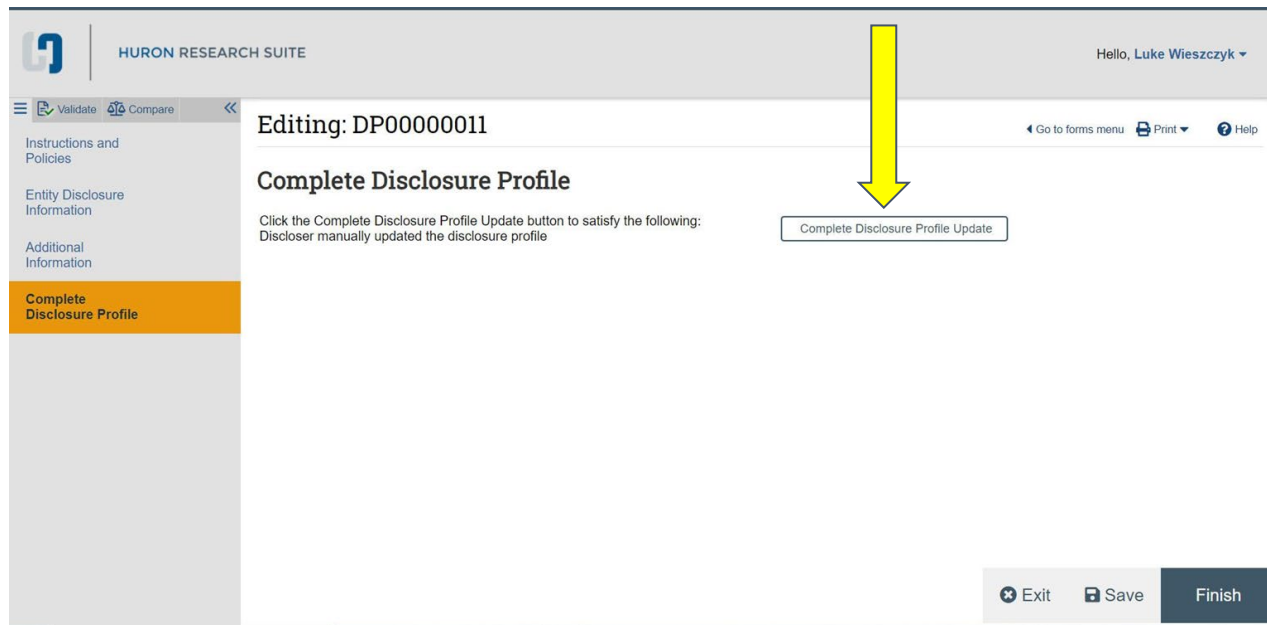
- 1. * Do you receive or benefit from payments or in-kind support of your research from a foreign entity that are NOT provided through an agreement between the foreign entity and CWRU (or hospital affiliate)?**
 Yes No [Clear](#)
- 2. * Do you currently participate in any foreign talent recruitment program?**
 Yes No [Clear](#)
- 3. * Select the option that best describes your primary role at the university:**
Faculty

At the bottom right, there are buttons for 'Exit', 'Save', and 'Continue'.



Completion Instructions

Clicking complete profile update will check for errors in your form. If there is anything that needs to be corrected you will be notified in this step.



The screenshot displays the Huron Research Suite interface. At the top, the logo and 'HURON RESEARCH SUITE' are visible on the left, and the user name 'Hello, Luke Wieszczyk' is on the right. Below the header, there are navigation options: 'Validate' and 'Compare'. The main content area is titled 'Editing: DP00000011' and 'Complete Disclosure Profile'. A message states: 'Click the Complete Disclosure Profile Update button to satisfy the following: Discloser manually updated the disclosure profile'. A yellow arrow points to a button labeled 'Complete Disclosure Profile Update'. At the bottom right, there are three buttons: 'Exit', 'Save', and 'Finish'.



Completion Instructions Cont.

**** NOTE ** Click OK AND finish to submit your annual COI disclosure. If you do not click both buttons your COI disclosure will not be submitted.**

The screenshot shows a web application interface for 'Complete Disclosure Profile Update'. The main content area contains the following text and list:

Completing this activity serves as my signature and attestation to the following:

- I hereby acknowledge that I have read and understand the CWRU Financial Conflict of Interests Policy.
- I affirm that the information provided is, to the best of my knowledge, true and complete and does not misstate any facts.
- I will provide additional information as requested by the Conflict of Interests Committee.
- I agree to cooperate in the development of any needed Management Plan as required per the Conflict of Interest Committee to manage, reduce, or eliminate existing conflicts of interest related to my university responsibilities, including participation in research.
- I agree to comply with the terms and conditions contained in any Management Plan.

For more information, use the following resources:

- COI Policy
- COI Website

At the bottom right of the main content area, there are two buttons: 'OK' and 'Cancel'. A yellow arrow points from the right towards the 'OK' button.

Below the main content area, there is a 'Save' button and a 'Finish' button. A yellow arrow points downwards towards the 'Finish' button.

The left sidebar contains the following menu items: 'Instructions and Policies', 'Entity Disclosure Information', 'Additional Information', and 'Complete Disclosure Profile' (which is highlighted in orange).

The top right corner shows a user profile 'Hello, Luke Wieszczyk' and a 'Print' button.

