



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

COI User Training

Spring 2024

Sparta Dashboard

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

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

Staging | HURON RESEARCH SUITE | Hello, Luke Wieszczyk | Switch User

Dashboard | Admin | Agreements | **COI** | Grants

Page for Luke Wieszczyk | Help

Create ▾

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My Inbox

Filter by **?** ID ▾ | Enter text to search | 🔍 + Add Filter ✕ 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



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 displays 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 breadcrumb trail shows the path: COI > Disclosures > Disclosure Profile for Luke Wieszczyk. The main content area features a yellow 'Action Required' button, a checkbox for 'Complete Disclosure Profile Update', and an 'Edit Disclosure Profile' button. Below these is an 'Instruction Center' table with two entries:

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	Discloser's training is out of date

At the bottom of the page, there is a table with columns for Management Plan, Status, Last Accepted Date, and 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 a web application interface for editing a disclosure profile. The top navigation bar includes 'Validate' and 'Compare' buttons. The main content area is titled 'Editing: DP00001805' and 'Instructions and Policies'. A left sidebar contains a menu with 'Instructions and Policies' (highlighted), 'Entity Disclosure Information', 'Additional Information', and 'Complete Disclosure Profile'. The main content area lists 'Training and Education' requirements, including a commitment to high standards for objectivity, a conflict of interest policy, disclosure requirements for all foreign entities, and a requirement to disclose foreign and domestic travel. It also states that violations may result in corrective actions. Below this, there are links for 'Researchers' and 'Non Researchers' to visit the COI website for further guidance. A 'Training documents' section indicates there are no items to display. At the bottom, it shows the 'Disclosure Profile Owner' as Luke Wieszczyk. The bottom right corner features 'Exit', 'Save', and 'Continue' buttons.



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.

Case Western Reserve University Sparta
Office of Research and

Editing: DP00001805

Entity Disclosure Information

1. * Do you, your spouse/domestic partner have a relationship with the above entity?
 Yes No [Clear](#)

2. Entity disclosures:

Entity	Foreign Entity?	Relationship
There are no items to display		

+ Add

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, Honoraria, Gifts, In-Kind Contributions	Speaking compensation, prizes, gifts, in-kind contributions (e.g. Nobel Prize)

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 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

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.

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 a web form titled "Sparta COI" from Case Western Reserve University. The user is logged in as "Hello, Luke Wieszczyk". The form is for editing record "DP00001805". The "Additional Information" section contains four 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:**
Staff
- 4. * Select all current affiliations below:**
 CCF
 MH
 UH
 VA
 N/A

At the bottom right of the form are buttons for "Exit", "Save", and "Continue".



Completion Instructions

Clicking Complete Disclosure 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 'Sparta COI' interface for 'CASE WESTERN RESERVE UNIVERSITY'. The header includes the university logo and 'Office of Research and Technology Management'. The user is logged in as 'Hello, Luke Wieszczyk'. The main content area shows 'Editing: DP00001805' and the title 'Complete Disclosure Profile'. Below the title, instructions state: 'Click the Complete Disclosure Profile Update button to satisfy the following: Discloser manually updated the disclosure profile'. A large yellow arrow points to a 'Complete Disclosure Profile Update' button. The left sidebar contains navigation options: 'Instructions and Policies', 'Entity Disclosure Information', 'Additional Information', and 'Complete Disclosure Profile' (which is highlighted in orange). At the bottom right, there are buttons for 'Exit', 'Save', and 'Save & Exit'.



Completion Instructions Cont.

Click “OK” to submit your COI Disclosure.

CASE WESTERN UNIVERSITY

Complete Disclosure Profile Update

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

OK Cancel

Exit Save Save & Exit

