

Huron eCOI – User Guide for Submitting a Pre-approval Request

Introduction

All Individuals must seek prior approval from their leadership and from the Office of Conflicts & Integrity for **outside consulting, other employment opportunities, and educational activities funded by Industry.**

In the Huron eCOI system, you will name your leader so the system will electronically route your request to them for approval. Choose the leader that is most responsible for overseeing and evaluating your primary work. If your leader approves your request, it will then be reviewed by the Office of Conflicts & Integrity for final approval.

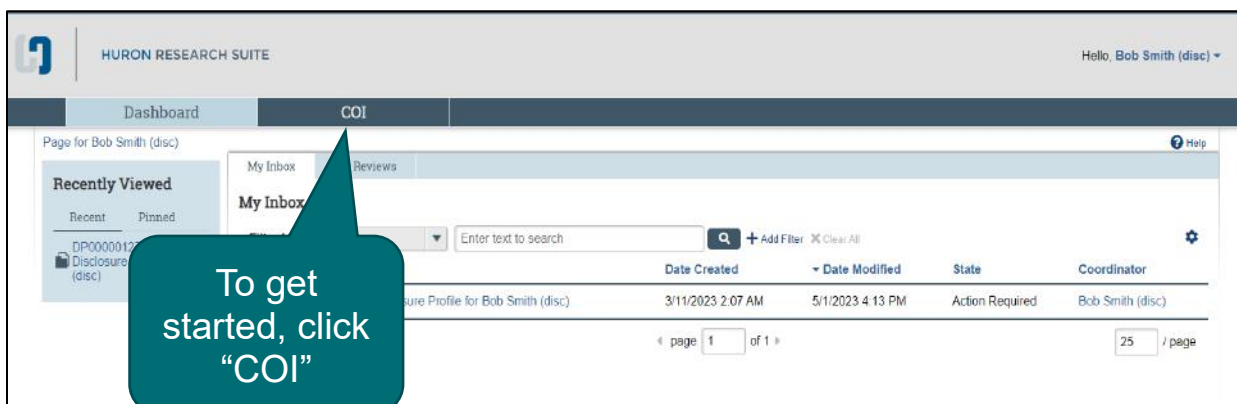
Logging In

The Huron eCOI website can be accessed by any computer in the Southeast Region at: <https://AHSoutheastCOI.huronresearchsuite.com/COI>

Login with your wakehealth.edu or atriumhealth.org username and password.

Submit a Pre-approval Request

1.



The screenshot shows the Huron Research Suite interface. At the top, there is a navigation bar with "Dashboard" and "COI" tabs. The "COI" tab is selected. Below the navigation bar, there is a search bar and a table of COI entries. A teal callout box with a white border points to the "COI" tab and contains the text: "To get started, click 'COI'".

Date Created	Date Modified	State	Coordinator
3/11/2023 2:07 AM	5/1/2023 4:13 PM	Action Required	Bob Smith (disc)

2.

HURON RESEARCH SUITE Hello, Bob Smith (disc) ▾

Dashboard COI

Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Disclosures > Disclosure Profile for Bob Smith (disc) Help

Action Required

Request Pre-Approval Select "Request Pre-Approval"

- Complete Disclosure Profile Update
- Annual Conflict of Interest and Conflict of Commitment Education-Training

Disclosure Profile for Bob Smith (disc)

Action Reason	Reason
Review disclosure information is current and accurate. Go to the disclosure profile box to update.	The disclosure profile is new and has never been completed
Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the Complete Disclosure Profile Update button.	Discloser's training is out of date
	A category associated with the discloser requires renewal

[Edit Disclosure Profile](#)

Disclosures Training History

i You have not disclosed any interests. Reference the Instruction Center to take the appropriate steps of completing a disclosure update.

3.

Creating New: Pre-Approval Request Go to forms menu Help

1. Requestor (this field is pre-filled and cannot be changed):
Bob Smith (disc)

2. Please note:

- Pre-approval is not required for participation in CME activities at domestic academic medical centers or for U.S. federally-funded courses, writing; textbook editorship; membership on peer review or grant review panels; service on study sections, DSMBs or OSMBs for federal studies; or visiting professorships/lectureships.
- Do not request expert witness activities here.

*** Requestor Last Name/External Entity (Example Smith/Medtronic):**

Please note the activities that do not require pre-approval.

Please note that Expert Witness requests do not come to the Office of Conflicts & Integrity.

7. If you need to go back to a previous page, you can use the normal back button for the browser or you can click on the page name in the left menu.

HURON RESEARCH SUITE

Validating Compare

Editing: PAR00000104

Request Information

Activity Information

Submit Request

Consulting, Proctoring, and other Professional Services Information

1. *Entity: ⓘ

[None] ...

or

If you cannot find the entity in the above list, enter the complete name here (no acronyms, please): ⓘ

8. Once you have answered the questions, you will come to the Submit Request screen.

Validating Compare

Editing: PAR00000091

Go to forms menu Print Help

Request Information

Activity Information

Submit Request

Submit Pre-Approval Request

Click the Submit button to submit your request for pre-approval.

Submit

Click the Submit button to go to the final step.

Exit Save Save & Exit

9. The final step is to answer OK to the attestation statement.

Submit

I certify that the information provided in this Pre-Approval Request is complete and accurate, and I will appropriately disclose this relationship in any applications for research funding or procurement, if applicable.

Make sure you click OK to complete your request and route your request for review.

OK Cancel

Checking the Status of a Pre-approval Request

1.

The screenshot shows the 'HURON RESEARCH SUITE' interface. The user is logged in as 'Bob Smith (disc)'. The 'COI' tab is selected in the top navigation bar. A callout box points to the 'COI' tab with the text 'Choose the COI tab.' Below the navigation bar, there is a 'My Inbox' section with a search bar and a table of items. The table has columns for ID, Name, Date Created, Date Modified, State, and Coordinator. One item is listed: DP00000127, Disclosure Profile for Bob Smith (disc), created on 3/11/2023 2:07 AM, last modified on 5/1/2023 4:13 PM, with a state of 'Action Required' and coordinator 'Bob Smith (disc)'. The page shows 1 item on page 1 of 1.

2.

The screenshot shows the 'HURON RESEARCH SUITE' interface. The user is logged in as 'Bob Smith (disc)'. The 'COI' tab is selected in the top navigation bar. A callout box points to the 'Requests' sub-tab with the text 'Choose Requests to see the status of any of your pre-approval requests.' Below the navigation bar, there is a 'Disclosure Profile' page. The page has a yellow 'Action Required' banner and a 'Request Pre-Approval' button. There are two checked items: 'Complete Disclosure Profile Update' and 'Annual Conflict of Interest and Conflict of Commitment Education-Training'. The 'Action Required' section contains a table with two rows of information. The first row states: 'Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the Complete Disclosure Profile Update button.' The second row states: 'Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the Complete Disclosure Profile Update button.' Below this is an 'Edit Disclosure Profile' button. At the bottom, there is a 'Pre-Approval Requests' sub-tab and a message: 'You have not disclosed any interests. Reference the Instruction Center to take the appropriate steps of completing a disclosure update.'

3.

HURON RESEARCH SUITE Hello, Bob Smith (disc) ▾

Dashboard COI

Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Requests

Requests

Pending Requests Approved Requests All Requests

Filter by ID Enter text to search + Add Filter X Clear All

ID	Name	Date Created	Date Modified	State	Discloser First Name	Discloser Last Name	Home Department	Assigned Reviewer	Request Type
PAR00000822		6/9/2023 11:50 AM	6/9/2023 12:00 PM	Under Review	Bob	Smith (disc)	Genome Center		Consulting, Proctoring, and other Professional Services
PAR0000081	Smith/Abbott	6/9/2023 11:44 AM	6/9/2023 12:15 PM	Under Review	Bob	Smith (disc)	Genome Center		Consulting, Proctoring, and other Professional Services

2 items page 1 of 1 25 / page

4. Once you choose a request, you may view more detail about the routing status.

COI > Disclosures > Disclosure Profile for Bob Smith (disc) > Smith/Abbott Help

Under Review

PAR0000081: Smith/Abbott

Date created: 6/9/2023 11:44 AM
Date submitted: 6/9/2023

Request type: Consulting, Proctoring, and other Professional Services
Assigned reviewer: Supervisor
Current review stage: Supervisor
Review stage: 1 of 2

Next Steps

View Pre-Approval Request

Add Comment

Copy Request

Pre-Submission -> Review -> Review Complete

Clarification Requested

History Review Information

Filter by Activity Enter text to search

Activity	Author	Activity Date
Pre-Approval Request Submitted	Smith (disc), Bob	6/9/2023 11:48 AM

For questions or assistance, contact the Office of Conflicts & Integrity:

- Wake Forest Baptist, Navicent and Floyd: coioffice@wakehealth.edu or 336-716-9300
- Greater Charlotte: CorporatecomplianceCOI@atriumhealth.org or 704-512-5900