



Completing a Disclosure Profile in Huron COI Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is designed to walk investigators through creating and updating a Disclosure Profile in the Huron Conflict of Interest (COI) management system. The Huron COI management system is where UVA researchers and administrators will disclose, identify, track, and manage interests and commitments.



Any individual regardless of title, role, or position, who is responsible for the design, conduct, or reporting on a proposal to a relevant federal agency/under a relevant solicitation must disclose **conflicts of interest** or **conflicts of commitment**. *Even if they have nothing to disclose, they still must complete the Disclosure Profile.*

Navigating to Your Disclosure Profile

You may receive an email notification when you need to disclose your interests in Huron COI. You can either click on the link in the email notification, then skip to Step 3. Otherwise, navigate to your Disclosure Profile in Huron:

1. Log into [Huron](#). This will take you to your Dashboard.
2. Navigate to the Disclosure Profile page:

Click on your Disclosure Profile if it appears in your **Inbox**:

ID	Name	Date Created	Date Modified	State	Coordinator
CERT00000148	Research certification for	8/11/2023 7:05 AM	11/10/2023 2:00 AM	Committee Review	
DPO0000149	Disclosure Profile for	8/25/2023 12:40 PM	10/25/2023 12:54 PM	Action Required	

Or, click on the COI Tab at the top of the page:



3. Refer to the Instruction Center to see the required action and the reason for that action:

Instruction Center	
Action Required Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the Complete Disclosure Profile Update button.	Reason The disclosure profile is new and has never been completed

Click on the appropriate link below to continue, depending on your task:

- [Complete the Disclosure Profile if you have something to disclose.](#)

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- [Complete the Disclosure Profile if you have nothing to disclose.](#)
- [Assign/Remove a proxy.](#)

If you **have something to disclose**:

On the **Disclosure Profile** page:

1. Select the **Edit Disclosure Profile** button.

Edit Disclosure Profile

On the **Instructions and Policies** page:

2. Read the Instructions and Policies carefully.

The external training section at the bottom will summarize your completed training, if any. Training that is required to be renewed will display an “Expires” date.

Course	Expires
View CITI Conflicts of Interest	12/14/2024
View Undue Foreign Influence: Risks and Mitigations	

3. Click the **Continue** button to acknowledge your understanding of the guidance and training requirements.

✕ Exit

Save

Continue →

On the **Entity Disclosure Information** page:

4. Select the radio button for “Yes” for question 1.

HURON RESEARCH SUITE Hello, _____

Editing: DP00000168 Go to forms menu Print Help

Entity Disclosure Information

1. * Do you have any significant financial interests (that are reasonably related to your institutional responsibilities) outside professional activities, and/or outside academic or research appointments to report? ⓘ

Yes No [Clear](#)



“**Entities**” include companies, service providers, non-government organizations (NGOs), foundations, competitors, non-competitors, and any other for-profit or not-for-profit entities.

“**Financial relationship**” includes payments, remuneration, equity holdings, or ownership.

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5. Add Entity Disclosures:
 - a. Click the **Add** button.

2. Entity disclosures:

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

In the **Entity Disclosure Information** pop-up window:



- b. Complete the required fields in the **General Information** section.
 - Entity
 - Relation to disclosure (more than one box can be checked)
 - Disclosure types (more than one box can be checked)
- c. Scroll down to complete the fields that populate based upon which disclosure type(s) you selected.

For more information on any of the fields, click the  icon.

- d. To save this entity and add another, click the **OK and Add Another** button and repeat steps 5.b. and 5.c.
- e. To save this entity and close the pop-up window, click the **OK** button.

6. View the Entity disclosure(s) you added in the table on the Entity Disclosure Information page:

2. Entity disclosures:

Entity	Foreign Entity?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified	
 Update	AstraZeneca	No	Self	Equity	\$500,000.00	N/A	12/21/2023 

7. Click the **Continue** button.



On the **Complete Disclosure Profile** page:

8. Click the Complete Disclosure Profile Update button if:
 - The disclosure profile is new and has never been completed.
 - Discloser was added to a research project.
 - A category associated with the discloser required renewal.

Complete Disclosure Profile

Click the Complete Disclosure Profile Update button to satisfy the following:
The disclosure profile is new and has never been completed
Discloser was added to a research project
A category associated with the discloser requires renewal

Complete Disclosure Profile Update

In the **Complete Disclosure Profile Update** pop-up window:

9. View the **Open research triggers**.

This list includes all your research projects currently in a non-final review state. If this update to your disclosures impacts a research project that is not listed, email Ask_rcoi@virginia.edu and provide the details so a COI Administrator can take the appropriate system action.

10. To add context for each project:

- a. Click the **Update** button.
- b. Enter **Related context** in the field provided.

Provide as much detail as possible to support whether you feel that your disclosures are related or unrelated to any aspect of the research project.



Context is referenced by the reviewers as a part of the relatedness and conflict review process.

11. Click the **OK** button when you are finished with updates.



The status of your Disclosure profile moves to **No Action Required** and your disclosure will now appear in the Disclosures section on the main COI Disclosures page:

The screenshot shows the COI Disclosures page. The 'Disclosures' tab is selected. A yellow box highlights the 'No Action Required' status. Below this, it says 'Disclosure profile last completed: 12/21/2023'. An 'Assign Proxy' button is visible. An 'Instruction Center' box contains the following information:

Action Required	Reason
No actions need to be taken at this time	Discloser's disclosure profile is up-to-date and requires no action

An 'Edit Disclosure Profile' button is located below the instruction center. At the bottom, a table lists the disclosures:

Entity	Foreign Entity?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
AstraZeneca	No	Self	Equity	\$500,000.00	N/A	12/21/2023


Congratulations, you have completed your Disclosure Profile.

If you have nothing to disclose:

Even if you have nothing to disclose, you still need to complete the Entity Disclosure Information and the Disclosure Profile.

On the **Disclosure Profile** page:

1. Select the **Edit Disclosure Profile** button.



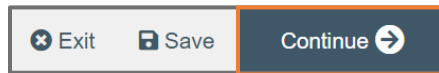
On the **Instructions and Policies** page:

2. Read the Instructions and Policies carefully.

The external training section at the bottom will summarize your completed training, if any. Training that is required to be renewed will display an “Expires” date.

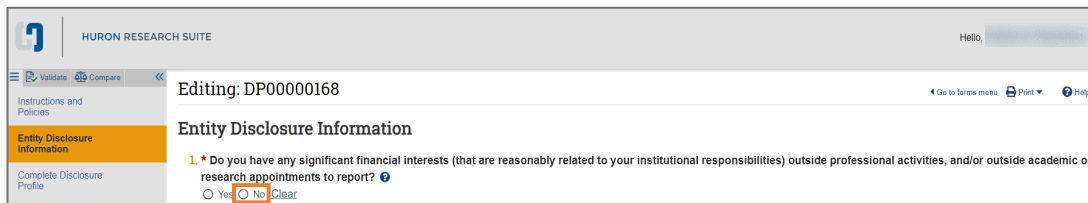
Course	Expires
View CITI Conflicts of Interest	12/14/2024
View Undue Foreign Influence: Risks and Mitigations	

3. Click the **Continue** button to acknowledge your understanding of the guidance and training requirements.



On the **Entity Disclosure Information** page:

2. Select the radio button for “No” for question 1.



The screenshot shows the 'Entity Disclosure Information' page in the Huron Research Suite. Question 1 asks: 'Do you have any significant financial interests (that are reasonably related to your institutional responsibilities) outside professional activities, and/or outside academic or research appointments to report?'. The 'No' radio button is selected and highlighted with an orange box.

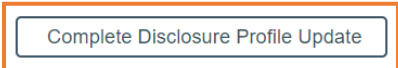
3. Click the **Continue** button.

On the **Complete Disclosure Profile** page:

4. Click the **Complete Disclosure Profile** button.

Complete Disclosure Profile

Click the Complete Disclosure Profile Update button to satisfy the following:
The disclosure profile is new and has never been completed
Discloser was added to a research project
A category associated with the discloser requires renewal



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In the **Complete Disclosure Profile Update** pop-up window:

5. View the **Open research triggers**.

This list includes all your research projects that are currently in a non-final review state.

6. After verifying you have nothing to disclose or update for any listed Research Project, click the **OK** button:

Research Project	Event Type	Sponsor	Related Context
EHD triggering event test	Grants JIT	Institute of Education Sciences	



The status of your Disclosure profile moves to **No Action Required**.

No Action
Required

Congratulations, you have completed your Disclosure Profile.

To Assign/Remove a Proxy:

To Assign a Proxy:

1. Click **Assign Proxy**

Action Required

- Complete Disclosure Profile Update
- Assign Proxy

2. Click on the ellipsis (...) to view people or type the person's name in the field.

Assign Proxy

- * Discloser proxy:

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If the person's name does not appear, they will need to be manually added by a COI Administrator. Email Ask_rcoi@virginia.edu to request this.

3. Select the person's name from the options and click the **OK** button.

Last	First	Organization	Preferred Email
Meyer	David	Huron Consulting, Inc.	dmeyer@hcg.com
Smith	Esteban	Huron Consulting, Inc.	

4. Click the **OK** button again. You will see the proxy's name displayed in the Disclosures section on the main COI Disclosures page:

COI > Disclosures > Disclosure Profile for Erin Eaker

No Action Required

Disclosure profile last completed: 12/21/2023

Assign Proxy

Remove Proxy

Disclosure Profile for Erin Eaker

Instruction Center

Action Required	Reason
No actions need to be taken at this time	Discloser's disclosure profile is up-to-date and requires no action

Edit Disclosure Profile

Discloser proxy: David Meyer

To Remove a Proxy:

1. Click **Remove Proxy**

No Action Required

Disclosure profile last completed: 12/21/2023

Assign Proxy

Remove Proxy

2. Click the **OK** button to remove the disclosure proxy for the person listed.

Once the disclosure profile has been removed, that person will no longer have access to it.