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:

   ![Inbox screenshot]

   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 screenshot]

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

   - Complete the Disclosure Profile if you have something to disclose.
• 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.

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.

<table>
<thead>
<tr>
<th>Course</th>
<th>Expires</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citi Conflicts of Interest</td>
<td>12/14/2024</td>
</tr>
<tr>
<td>Undue Foreign Influence: Risks and Mitigations</td>
<td></td>
</tr>
</tbody>
</table>

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

On the Entity Disclosure Information page:

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

“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.
5. Add Entity Disclosures:
   a. Click the Add button.

   ![Entity disclosures table]

   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 ![Help icon](? 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:

   ![Entity disclosures table]

7. Click the **Continue** button.

   ![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.
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:

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.

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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.

3. Click the Continue button.

On the Complete Disclosure Profile page:

4. Click the Complete Disclosure Profile button.
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:

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

Congratulations, you have completed your Disclosure Profile.

To Assign/Remove a Proxy:

To Assign a Proxy:

1. Click Assign Proxy

2. Click on the ellipsis (...) to view people or type the person’s name in the field.
3. Select the person’s name from the options and click the OK button.

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

To Remove a Proxy:

1. Click 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.