**Conflict of Interest (COI) Module Training Setup**

**Module Description:**

The Click Portal COI module provides an electronic system for management of research-related conflict of interest disclosures. The COI module ensures the prevention of bias and helps avoid a circumstance in which a researcher’s personal interest or relationships might compromise the integrity of research at the University.

Each faculty member is required to complete an Annual Financial Disclosure form at the time of applying for funded research or prior to the release of grant funds, whichever occurs first, annually thereafter, and within 30 days of discovering or acquiring a new significant financial interest. The Conflict of Interest Committee (CIRC) and the Conflict of Interest Officer carefully review these disclosures, effectively manage any conflicts, and report to appropriate federal agencies as needed.

**Objectives:**

* Provide principal investigators, study staff, compliance and research administration staff an overview of the COI module
* Demonstrate how to:   
  + Access and update an Annual Disclosure Certification
  + Create a Disclosure and submit it for review
  + Manage the Disclosure review process
  + Create a Management/Mitigation Plan to address conflict and monitor the plan
* Allow the participants to practice with hands-on exercises
* Provide training materials and references that will provide assistance while using the COI module

**Training Exercises:**

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| **COI Module Exercises** | **Role(s)** |
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| **Navigation Exercises** | |
| * Exercise 1: Log into the COI Module | PI/COI Discloser |
| * Exercise 2: Explore the Inbox | PI/COI Discloser |
| * Exercise 3: Explore COI Submissions | PI/COI Discloser |
| * Exercise 4: Explore the Certification Workspace | PI/COI Discloser |
| * Exercise 5: Explore the SmartForm Pages | PI/COI Discloser |
| **Draft Exercises** | |
| * Exercise 6: Edit a Certification | PI/COI Discloser |
| * Exercise 7: Submit Disclosures to Review | PI/COI Discloser |
| **Ancillary Review Exercises** | |
| * Exercise 8: Manage Ancillary Reviews | COI Administrator |
| * Exercise 9: Submit an Ancillary Review | Ancillary Reviewer |
| **Administrative Review Exercises** | |
| * Exercise 10: Review Certification Details | COI Administrator |
| * Exercise 11: Assign a Committee | COI Administrator |
| * Exercise 12: Record and Complete an Administrative Review | COI Administrator |
| **Preparing for Meeting Exercises** | |
| * Exercise 13: Prepare an Agenda | COI Administrator |
| * Exercise 14: Send an Agenda | COI Administrator |
| * Exercise 15: Assign a Reviewer | COI Administrator |
| **Primary/Secondary Reviewer Exercises** | |
| * Exercise 16: Review Certification Details | COI Committee Member |
| * Exercise 17: Log Comments | COI Committee Member |
| **Meeting Convened Exercises** |  |
| * Exercise 18: Convene a Meeting | COI Administrator |
| * Exercise 19: Record Meeting Attendance | COI Administrator |
| * Exercise 20: Prepare the Meeting Minutes | COI Administrator |
| * Exercise 21: Close a Meeting | COI Administrator |
| * Exercise 22: Record the Committee Decision | COI Administrator |
| **Review Complete: Preparing Correspondence Exercises** | |
| * Exercise 23: Create or Upload a Management/Mitigation Plan | COI Administrator |
| * Exercise 24: Prepare and Send Correspondence | COI Administrator |
| **Discloser Review of Plan Exercises** | |
| * Exercise 25: Review the Management Plan | PI/COI Discloser |
| * Exercise 26: Submit a Response | PI/COI Discloser |
| **Under Management/Mitigation Plan Exercises** | |
| * Exercise 27: Complete the Monitor Report | COI Monitor |
| * Exercise 28: Indicate that the Plan is Satisfied | COI Monitor |
| **Create New Committee and Meeting Exercises** | |
| * Exercise 29: Create a New Committee | COI Administrator |
| * Exercise 30: Schedule a Meeting | COI Administrator |

**Training Materials:**

**COI Module Instructor**

* COI Module – Introduction PowerPoint
* Laptop or computer with hardwired Internet connection

**Participants**

* COI Module – Exercises
* COI Module – Sample Disclosure
* Work Instructions:
  + COI Workflow
  + Edit/Submit a Certification
  + Review Certification Details
  + Working with Management Plans
  + Committee Activities