Weill Research Gateway
Job Aid + Frequently Asked Questions

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Frequently Asked Questions
The Weill Research Gateway

What is the Weill Research Gateway?
The Weill Research Gateway (WRG) will be used to consolidate research-related administrative tasks into one portal. Currently it is used for the annual Conflicts Survey, Travel Disclosures, and Study Specific Reports. Keep an eye out for expanded research functionality coming soon to WRG.

Logging In to WRG
WRG operates best using the following browsers:

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<tr>
<th>PC</th>
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<td>Firefox</td>
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<td>Chrome</td>
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- To log in, enter the URL below into your browser address bar:
  - [http://wrg.weill.cornell.edu](http://wrg.weill.cornell.edu)
- Enter your CWID and password on the next screen.
- This should take you to the homepage of WRG.
The WRG Homepage

Exit, Help, and Support

The **Exit** button will log you out of the Weill Research Gateway. Another acceptable method is to simply close your browser window.

The **Help** button will direct you to WRG-specific help documentation and training materials.

The **Support** button will take you to myHelpdesk, where you can submit a support ticket to resolve any technical issues with WRG.

Note: You can always find more information on **Help + Support** later in this document.
Left Navigation Pane (Modules of WRG)
This is where you will find the different modules of the Weill Research Gateway. Currently, Conflicts of Interest is the only available module, but this is where you will access other modules as they become available.

Conflicts of Interest: Where you can find the Annual Conflicts Survey, Travel Disclosures, and Study Specific Reports.

My Profile: Allows you to edit certain settings in the Weill Research Gateway. There is not much functionality here that you can customize, but you can change the color of your WRG theme, as well as adjust the number of results displayed on a search.

Helpful Tools
At the top of the screen, you will find some useful tools, including:
- Find Funding: Takes you to the SPIN search engine, a database where you can find sponsored funding opportunities.
- CV Database: This feature is currently unavailable.

My Open Action Items
This section is where you will see any open action items you may have. You can review and respond to the Conflicts Office’s comments on your submission.

Right Navigation Pane
Here, you can find different features including a built in Calendar, your action items, and any Messages sent to you in the system.
Conflicts of Interest

What are Conflicts of Interest?
The Conflicts of Interest tab is where you will report any financial relationships you may have that pertain to your institutional responsibilities here at Weill Cornell Medicine. Potential conflicts may be detected between people and sponsors, sponsors and projects, projects and funding applications, etc.

At WCM, we have three primary ways of reporting potential conflicts:
- **Annual Conflicts Survey**: All WCM employees must complete the Conflicts Survey. You are required to update your Conflicts Survey any time you develop a financial relationship related to your institutional responsibilities here at WCM that may present, or appear to present, a conflict of interest. Any new relationships must be reported through the Conflicts Survey within 30 days of acquiring them. If you have no relationships to report, you must still certify once a year.
- **Travel Disclosures**: Travel disclosures should be submitted by all WCM employees who receive travel support that is not sponsored by Weill Cornell Medicine.
- **Study Specific Reports (SSR)**: SSRs are used for capturing information on one’s external relationships in the context of a project and should be submitted at the time of grant proposal or Institutional Review Board (IRB) application, and prior to release of an award.

Submitting your Conflicts Survey

**Helpful Tip**: The Show button at the top of the screen provides field help that may come in handy to clarify questions.

1) From the home page of WRG, select the **Conflicts of Interest** tab on the left navigation menu.
2) Select **Update** from the menu.
3) Select the **Create Conflicts Survey** button.
4) On the above page, read over the Policy, Survey Instructions, and Examples of Reportable Interests.
5) Answer the two Primary Questions.
6) Click the Completed checkbox.
   a. While most people at WCM will not have conflicts to report, answering Yes to the first question will require you to answer additional questions before officially submitting your survey — you can skip ahead to Step 7 if this is the case.
   b. If you answered No to both questions, verify the Cover folder has a green checkmark next to it and click the Submit button, located in the top right corner.
      i. You can view or print a confirmation of your survey by clicking the View Last Conflicts Survey button on the preceding screen.

7) If you answered Yes to the first Primary Question, you will see additional sections of the survey (as seen below) that you must complete. A green checkmark will indicate completion of each section. This can be found on the top left section of the page.
8) Click the **Entities folder** to submit additional information about your conflicts.

9) Type the **name of the Entity** in the text entry field.
   a. **Helpful Tip**: As you begin typing the name of the entity, you can select from a list of prepopulated entities to make this step easier.
   b. If the entity you are trying to select is not in the dropdown list, email Sponsor-Creation@med.cornell.edu with the subject “COI Entity Request.” They will add the sponsor and notify you when you can go back in to select that entity.

10) Click the **Add** button.

11) On the **Entity Details** page, provide answers to the series of questions on the screen.
   a. Note: Additional fields may pop up when you answer certain questions. These are meant for you to clarify your answers or provide additional information relevant to the question.

12) Under the **Financial Interests** heading, you must provide specific information about the activity or interest you have with that entity.
   a. **Who?** – Specify who in your household this interest applies to.
      i. If the options listed do not adequately describe the relationship to you, select “Other” and list the relationship in the Comment section.
   b. **Type?** – Select the option that describes the type of relationship you have with the entity.
   c. **Value** – Certain selections may require that you enter a dollar amount with your entity.
d. **Comments** – Use this field to further describe any selections you made with an asterisk. (*)
   i. Click the **Add Activity / Interest** link at the top of the table to add any additional line items for this entity.

e. You can **Delete** the line item by selecting the trash can at the end of the table.

13) After entering the information, click the **Completed** checkbox at the top of the page.
   a. This will take you back to the Entities page. If you have additional entries to make you can **repeat steps 9-17**.

14) If you have no additional entries to make, click the **Completed** checkbox in the top right corner.

15) Under the Travel Section, if you answer Yes, you will have the option to be directed to the **Travel Disclosure** form.
   a. Opening the **Travel Disclosure** will open a new window, once you have completed the Travel Disclosure, return to the Conflicts Survey to complete it.

16) **Verify** the Entities section is completed by the green checkbox.

17) Click the **Certification** folder to continue.

18) **Review** the instructions and policies.
19) Click the **Completed** checkbox.
20) Click the **Submit** button.

**Conflicts Survey: Additional Notes**
The Conflicts Survey needs to be completed by every WCM employee at least once per year and within 30 days of acquiring a new conflict. You can recertify with the following steps:
1) From the WRG Homepage, click **Conflicts of Interest**.
2) Click the **Update** link.
3) Click the Recertify/Update Conflicts Survey button.
4) You will still want to review each section of the survey and click **Complete** after your review.
   a. You can remove an entity entirely by clicking the **Delete** (trash can) icon.
   b. You can update details of an existing entity by clicking on the **Open** (folder) icon.
   c. You can add new entities by following the steps listed in the previous section.

**Submitting a Travel Disclosure**
1) From the homepage of WRG, select the **Conflicts of Interest** tab.
2) Select the **Update** link.
3) Click the **Edit/Submit Travel Disclosure** button.

4) From the above page, read over the Policy and Survey Instructions.
5) Click the **Set** button to enter your entity or source of payment.
   a. Begin typing the name of your entity and select it from the **dropdown menu**.
b. Click the Select button.
6) Enter the Travel Start Date.
   a. Use format mm/dd/yy
7) Enter the Duration of your travel.
8) Enter your Destination.
   a. If you are disclosing travel for anyone other than yourself, enter their name here as well (ex: Boston, MA / Joe Smith).
9) Enter the estimated Value of your trip.
10) Select a Purpose for your travel from the dropdown menu.
    a. After you've finished entering information on that line, you can click the Add an Additional Travel Row button to add another line.
11) Click Submit in the top right corner to complete your Travel Disclosure.
    a. Verify your completed Travel Disclosure by clicking the View Travel History button on the preceding screen.

Travel Disclosure: Additional Notes
- This travel form is not linked to the Conflicts Survey, however it can be accessed while filling out the Conflicts Survey. Any submissions to travel will not reset the Conflicts Survey compliance date.
- You can view the last 12 months of Travel History by following these steps:
  1) Click the Conflicts of Interest tab
  2) Click Update
  3) Select the View Travel History button

Submitting a Study Specific Report (SSR)
Note: You must have a current Conflicts Survey on file to be able to complete this form. You will only be allowed to select interests that have already been disclosed on the Conflicts Survey. If you have a new interest to report, please update your Conflicts Survey first.

1) From the homepage of WRG, select the Conflicts of Interest tab.
2) Click the Update link.
3) Click the Edit/Submit Study Specific Report (SSR) button.
4) Review information about the Policy and Survey instructions.
5) Click the Create New button.
6) On the next page, click the checkbox to indicate that your Conflicts Survey is complete and accurate.
a. **Helpful Tip**: If you have not yet completed your Conflicts Survey, there is a link included directly to it. You will need to complete your Conflicts Survey before completing an SSR.

7) After clicking the checkbox, a list of questions comes up. Use the **dropdown** menu to select the related financial interest.
   a. The dropdown menu will consist of entities previously entered in your Conflicts Survey.

8) Click the **Select** button.

9) **Provide answers** to the series of questions on the screen.
   a. Note: Additional fields may pop up when you answer certain questions. These are meant for you to clarify your answers or provide additional information relevant to the question.
   b. Under **Project Principal Investigator** – begin typing the name of your PI. As you type, a list of PIs will populate and you can make your selection.
   c. Make sure to click the **Select** button after highlighting your choice.

10) After entering all the information, scroll to the top of the page and click the **Completed** checkbox.

11) **Verify** the completion of your SSR details by noting the green checkbox.

12) Click the **Submit** button in the top right corner.

**Study Specific Report: Additional Notes**
- Upon pressing the Create New button, the system will save the report. If you do not want to submit the form at a particular time, you can come back to it by searching for the time it was initiated under the In Progress header. To access the form, click on the folder under the column labeled Open.

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<th>Protocol Number</th>
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Action Items – Conflicts of Interest
Our Conflicts Office will review your submissions. You may be asked to provide additional information and clarification on any entries you have made. You will see all Open Action Items on the first login page of WRG. You can also view them by clicking the My Action Items box on the right side of the page, and then clicking Open.

1) **Click the folder icon** (您好) in the top left corner of the Action Item to view more information about it.
2) **Review** the information on the screen, which is broken down by section:
a. **Instructions** – Review this section for specific information on completing your action item.
b. **Item** - This is the specific file pertaining to your action item. You can view it by clicking the folder icon under Open.
c. **Your Action / Decision** – If more information is requested from you, this is where you will type your response.
d. **Current Assignment** – This shows the current status of the Action Item.
e. **Assignment History** – This is where you will see comments from the Conflicts Office and this is where you will look to determine what action needs to be taken.

3) **Review** the Assignment History section to determine which action needs to be taken.
4) **Respond** in the **Comments** section under Your Action/Decision.
5) Click the **I am Done** button at the top of the page.
Help + Support

There are a variety of ways for you to get Help + Support for the Weill Research Gateway, including both On-the-Job Support and Direct Support channels. We’re here to make sure you have an exceptional experience within WRG.

On-the-Job Support

Videos
You can view video demonstrations of some of the more detailed transactions within WRG. These videos will provide step-by-step, visual instructions on completing these transactions. You can find all WRG videos on our Help Portal.

Quick Reference Guides
Sections of this job aid have been broken out into their own Quick Reference Guides for easy access. You can find all WRG Quick Reference Guides on our Help Portal.

Direct Support

myHelpdesk
myHelpdesk is a self-service web portal that allows you to submit any issue or request online. When you fill out a simple form, your issue will be routed to our Client Services team to help fulfill your request or resolve your issues.
Follow these instructions to submit a ticket via myHelpdesk:

1) Click the **Support** button in left column of WRG.
   a. You can also visit [http://myhelpdesk.weill.cornell.edu](http://myhelpdesk.weill.cornell.edu).
   b. You may need to log in with your CWID + password.
2) Select **Create an Incident**.
3) **Answer** the questions on the following screen.
   a. Add a screenshot if you can, this will make it easier for Support to resolve your issue. Click the **Add Attachments** button to add a screenshot.
4) Click **Submit** to send your issue.
5) Take note of the **Incident Number** (format: INC0000000).
6) Support will reach out to you with a resolution.

**Phone Support**
(212) 746-4878
Extension: 64878 (6-GURU)
You can contact the Support Desk at the number above to speak with a person right away. Depending on the nature of your issue, they may forward you to a specialized Application Support Group for Weill Research Gateway.

**ITS Coaching Lab**
ITS sponsors a Coaching Lab on a monthly basis where users of ITS applications can come in and get specialized one-on-one help from a member of the Training + Communications group. Email its-training@med.cornell.edu for a schedule of sessions and to let us know what we can help with.
Frequently Asked Questions

How do I update my email preferences?
- Click My Profile from left navigation pane
- Click Edit
- Click Portal Preferences
- Under the Profile Preferences, choose Yes or No for the ‘I would like to receive an email when something is assigned to me’ question

What if my entity is not listed?
- If the entity you are trying to select is not in the dropdown list, email Sponsor-Creation@med.cornell.edu with the subject "COI Entity Request" They will add the sponsor on the backend and notify you when you can go back in to select that entity.

I’m having trouble finishing my transaction.
- In many cases, the Completed checkbox must be checked before clicking Submit.
- If this doesn’t work, there may be required fields that are not filled out. Review the form your submitting and check for any errors or missed fields.
- If you continue to experience issues, contact Support.

How do I know if my submission was successfully received?
- You will receive an email confirmation. You will also receive a notification if any action needs to be taken on your submission.

I see I have an Open Action Item – how do I view more details?
- If a submission is returned to you, you will see an Open Action Item on first page after login. Click the folder Icon to view that Action Item.

One of my submissions was returned to me requesting more information. Where do I respond?
- Click the folder icon in the top left corner of the Action Item.
What if I’m the PI on a project for which I’m submitting an SSR?
- Select your own name from the dropdown menu.

The Exit button doesn’t work. How do I log out?
- You can log out of WRG by closing your browser window.