The Annual Conflicts Survey
Quick Reference Guide – Conflicts of Interest

You are required to update your Conflicts Survey any time you develop a financial relationship related to your institutional responsibilities at Weill Cornell Medicine. 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.

Quick Instructions

1) Log on to the Weill Research Gateway at http://wrg.weill.cornell.edu
   a. Enter your CWID and password.
2) Click the Conflicts of Interest tab on the left navigation menu.
3) Select the Create Initial Conflicts Survey button.
   a. This button may read Recertify/Update Conflicts Survey if you’ve previously completed one.
4) Read the Policy, Survey Instructions, and Examples.
5) Answer the three Primary Questions.
   a. Note that if you are a physician, you must read the Open Payments section beneath the question and take action if necessary.
   b. If you answer Yes to Question 3, follow the steps below to add your family member:
      i. Click the Add link.
      ii. Click the Set link.
      iii. Begin typing the name of your family member in the entry field.
      iv. Select their name from the dropdown list that populates beneath the entry field.
      v. Click the Select button.
      vi. Optional: Click the Save and Add Another button to add any additional family members.
      vii. Click the Save button.
      viii. Click the Close button.
      ix. You’ll see your family member’s name(s) listed on the Conflicts Survey.
6) Click the Check when page complete (uncheck to edit) checkbox.

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 8 if this is the case.

If you answered No to the first question, verify the folder has a green checkmark next to it and click the Submit button, located in the top right corner. 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 must enter information about your entities.
8) Click the Entities folder (Entities ) to submit information about your conflicts.

Every year you must log in to recertify your entities. If you’ve previously submitted entities and simply need to recertify them, you can skip ahead to Step 20.

9) Type the name of the Entity in the text entry field, select from the dropdown menu.
10) Click the Add button.
11) On the Entity Details page, provide answers to the series of questions on the screen.
12) Under the Financial Interests section, 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.
   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. (*)
e. Click the **Add Activity / Interest** link at the top of the table to add any additional line items for this entity.

13) Under the Travel Section, if you answer Yes, the Travel Disclosure form will open underneath the Financial Interests section.
   a. Complete the **Travel Disclosure** form below. For more information on these entry fields, refer to the Travel Disclosure Quick Reference Guide.

14) After entering the information, click the **Check when page complete (uncheck to edit)** 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 10-15**.

15) Click the **Check when page complete (uncheck to edit)** checkbox at the top of the Entities page.
16) Click the **Certification** folder to advance to the next step.
17) Click the **Agree** checkbox.
18) Click the **Submit** button.

**Recertifying Your Conflicts Survey Annually**

Prior to this section you’ve logged into the Conflicts Survey and kept your answer to Q1 as Yes. You’ve clicked the Entities folder to navigate to that page.

1) **Note the entities** you reported last year listed toward the bottom of the page.
2) **Optional**: **Make any changes** to the entities based on your relationship with them.
   a. Click the ( ▼ ) icon to expand the selections to view your previous year’s answers.
   b. Click the ( ▼ ) icon to make any edits to your entity.
      i. **IMPORTANT NOTE:** *If you select this button, even if you don’t make any changes, you must answer the Travel question at the bottom of the screen.*
      ii. *If you make any changes to your entity, after completing the page it will come in certified.*
   c. Click the ( ▼ ) icon to delete the entity if you no longer have a relationship with them.
3) After ensuring your entities are updated, you can either **certify them individually**, or click the orange **Certify All** button.
4) Click **OK** on the confirmation window that pops up.
5) Click the **Certification folder** on the left navigation pane.
6) Review the disclosures and click the **Agree** checkbox.
7) Click **Submit** to complete the Recertification of your Conflicts Survey.

*After completing your Conflicts Survey, you will receive an email confirming your submission. All email notifications are also viewable in WRG under the My Messages tab.*

*View the WRG Job Aid for a more information and comprehensive instructions.*