Overview
This document provides a detailed review of all transactions housed within the Weill Research Gateway (WRG). You can navigate to a specific section of the document using the table of contents below.

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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 Conflicts of Interest and Sponsored Programs. 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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1) To log in, enter the URL below into your browser address bar:
   a. [http://wrg.weill.cornell.edu](http://wrg.weill.cornell.edu)
2) Select your institution from the list provided.
3) Enter your CWID and password on the next screen.
4) This should take you to the homepage of WRG.
The WRG Homepage

1) **Left Navigation Menu**: 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.
   a. **Sponsored Programs**: The Sponsored Programs module is where you’ll go to submit proposals in the system, including system-to-system grants.gov applications as well as other proposal types.
   b. **Conflicts of Interest**: The Conflicts of Interest (COI) module is where you can find the transactions to report conflicts of interest, including the Annual Conflicts Survey, Travel Disclosures, and Study Specific Reports.

2) **Top Navigation Menu**: This provides a more administrative and broad set of navigation options within the Weill Research Gateway.
   a. **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.
   b. **My Items**: Will list the items you have submitted (ex: Proposal submission in Sponsored Programs)
   c. **Search for Items**: Similar to the Quick Find Search Bar, this allows you to search for items you have previously submitted.
   d. **Calendar**: An internal-to-WRG calendar you can update with particular events.
e. **Mailbox**: This is where you can go to see any system-generated notifications that were sent by the Weill Research Gateway. These should have additionally been emailed to your @med.cornell.edu email address.

f. **Action Items**: This section is where you will see any open action items you may have. In most cases you navigate directly to the transaction that requires your action.

3) **Quick Find**: You can search for entries or submissions you made in WRG. (Ex: You can search for a Proposal by its title or Proposal number.

4) **Content page**: This is where the content of your menu selection will open. By default, the Homepage contains your Action Items and Mailbox.

5) **Help + Support**: At the bottom of the homepage you'll find options for getting Help + Support with the Weill Research Gateway.
Sponsored Programs

What is the Sponsored Programs Module?
The Sponsored Programs module of WRG provides a single intake portal for all research-related documents to be routed to central offices, including grants, sponsored research agreements, data use agreements and other research related contracts. As you enter the system and begin answering questions, it will adapt to your needs and fit the document type you’re routing for review.

Process Flow for Sponsored Programs
The Sponsored Program module is built to accommodate several different types of documents. The workflow may change a bit depending on the type of document or proposal you’re submitting.

Answer initial setup questions. Fill out the initial sections of the Proposal Screen. Submit Proposal for Pre-Review. Continue filling out the Proposal. Submit for Final Review.

Additional Notes
1) You can continue to update sections of the Proposal Screen after submitting for Pre-Review. Note that you should not make any changes to the Budget tab after submitting for Pre-Review.
2) For contracts, there is no Pre-Review Route. After completing relevant questions and uploads, and if applicable a budget, you'll move straight to the Final Review for submission to the appropriate central office, OSRA or JCTO.
3) Each route also collects important departmental approvals before reaching Central Administration for review. Depending on whether you’re submitting a grant or contract, either the Pre Review Route or Final Route stops with the financial approver and the department head or department chair. It will also send conditional notifications to collaborating department personnel, as well as central offices like EHS, IRB, and ITS.
4) For grants, the Final Route stops with the principal investigator and again with the Financial approver for a final thorough review before reaching OSRA.
5) Once OSRA has reviewed the proposal, they will submit the package the sponsor for approval.
6) You will be notified of the approval of your application or whether it was returned for edits via system notification and direct messaging from OSRA.

Creating a New Proposal
The following step-by-step instructions cover how to initiate a proposal in the Sponsored Programs module of WRG.

Initiating the Proposal
Don’t forget! – You can access the Quick Reference Guide for this transaction from the Sponsored Programs - Guides page on the ITS website.

1. Click the Sponsored Programs tab on the left navigation menu of the WRG Homepage.
2. Click the Create New Proposal button from the menu.
   a. A new window will open with the New Proposal Questionnaire.

3. Confirm the PI (Principal Investigator) for this proposal.
   a. By default, your name will be selected. Click the blue Change button next to your name to update the PI.
4. Select whether you will Create a New Proposal or Copy from an Existing Proposal and click Continue.
5. Choose the opportunity source or manual proposal setup from the dropdown menu and click Continue.
   a. In this example, we’ll continue with a Grants.gov opportunity.
   b. See the section Manual Proposal Types for more information on other types of submissions.
6. Enter the Program Announcement (PA) number in the entry field and click Search.
   a. Ex) PA-18-160
7. Note the results and click the blue Select button directly underneath to your choice.
8. Select a Proposal Type and click Continue.
9. Select a sponsor from the dropdown menu or full list and click Continue.
10. Enter the Proposal’s Title and click Continue.
11. Enter the From and To Dates in the corresponding fields.
    a. Click the calendar icon to open up a quick way to select dates.
12. Confirm the number of budget periods that are automatically generated and click Continue.
13. Review the information you’ve submitted on the proposal.
    a. If you need to make any changes, you can click the Step back through responses button.
14. Click Create Proposal.

Answering Setup Questions
After answering a few basic questions, the Proposal Screen opens and is restricted to a few additional Setup Questions. These questions will inform the specific sections of the Proposal Screen you will fill out later in the transaction. Descriptions of each section of Setup Questions can be found below.

After answering all sections you’ll click the blue Save and Continue button.

**Grants.gov Submission Information**: This pulls in information directly from the Grants.gov opportunity you selected earlier in the transaction. You can view information like the opportunity number and title, as well as R01 Validations. Beneath that, you can few the included forms which are marked with a green checkmark. You will fill these out later in the proposal and can additionally opt to add forms that may be relevant to your proposal.

**Deadline Information**: This should automatically populate based on the opportunity. You can adjust as necessary.

**General Proposal Properties**: This section contains a short list of questions that, depending on how you answer, will inform which additional sections of the proposal you will fill out later.

**PHS/NIH**: These additional questions are asked when you selected a PHS/NIH opportunity.

**Budget Setup Information**: This is where you’ll choose the Program Type (ex: grant, contract, training, etc) as well as indicate where the majority of research will be conducted (either on or off campus.)

After answering all sections you’ll click the blue **Save and Continue** button.
The Proposal Screen

The Proposal Screen is the primary location you will enter information for your submission. If applicable to your chosen type of submission, you must complete all sections above the Pre-Review Route before sending it off for that initial review. Otherwise, all sections must be completed before submitting to the Final Review Route (Finalize).

Navigating the Proposal Screen

- **1) Left Navigation Menu**: These are the sections of the proposal you must complete. More information about each section can be found below.
  - **Best Practice**: Always start by clicking the Budget tab and entering Personnel for this proposal. Salary will need to be released for personnel on the Budget, and starting here allows this process to occur while you fill in other parts of the proposal.
- **2) Section**: This is where the content or forms you must fill out will appear.
- **3) Save**: After completing each section you must click the Save button, followed by the Complete checkbox within the section.
  - There’s also a callout box here where you can click **Done**, as well as access **Help** and **Support**.
4) **Completed Checkbox**: Click this after clicking Save. This locks in the responses you made on this form. You will notice a blue checkmark next to sections on the Left Navigation Menu that have been completed.

**The Sections of the Proposal Screen**

**Universal Questionnaire**: This form contains additional questions pertaining to your application.
- Answer the questions on the form.
- Additional branching questions may appear based on how you answer.
- Click the blue Save button in the top left corner of the page, followed by the Complete checkbox in the top right corner of the form.
- Note a blue checkmark next to the Universal Questionnaire link in the left navigation column, indicating this section is now complete.

**SF424**: Much of this form comes preloaded with institutional info but there may be additional questions required, which will typically be highlighted in yellow.
- Answer the highlighted questions on the form.
- Click the Save button, followed by the Completed checkbox.
  - You will see a prompt directing you to any missing information.

**Budget**: The Budget tab is a complex transaction. Please view the Budget section of this document or the Budget Quick Reference Guide.

**Personnel**: This tab is where you’ll list all personnel relevant to this proposal. It pulls in information you entered in the Budget tab, but you can add additional entries here (ex: Other Significant Contributors)
- Click the black Add Personnel tab if you need to add any additional personnel here.
- Review the personnel listed.
- Note whether or not their Conflicts of Interest survey has been completed (indicated with a green checkmark).
  - You can hover over this field.
- Upload the CV / Biosketch of Key personnel.
- Upload Current / Pending Support if necessary.
- Click the Save button, followed by the Completed checkbox.

**Pre-Review Route**: (System-to-System Grants only). The Pre-Review Route allows both your department and OSRA to review administrative information and the application budget.
- Ensure there is a blue checkmark for all tabs above the Pre-Review Route on the left navigation panel.
- Click the Thumbs Up icon on the form.
  - A popup window will appear which goes over the process flow.
- Click the Submit button.
  - This will now be submitted through the workflow.
  - You will be notified via email once the Pre-Review Route is complete
  - You can continue the application even while the Pre-Review Route is underway
  - Please make sure not to un-complete or edit any tabs above the Pre-Review Route.
Reviewer Checklist: The Reviewer Checklist is where you’ll go to view feedback from the approvers on this proposal, however no action is needed by you on this tab.

Other Project Info: This form collects additional information about the project. It populates with some of the questions you answered previous and some additional ones you have to answer now.

- Note that Other Project Info now incorporates other sections/tabs from the left navigation menu that were previously listed separately in past iterations of the transactions, including:
  - Project Summary
  - Project Narrative
  - References Cited
  - Resources
  - Other Attachments
- Answer any blank questions on the form.
- Additional branching questions may appear based on how you answer.
- Click the Add Attachment button to upload any necessary documentation.
- Click the Save button, followed by the Completed checkbox.

PHS 398 Research Plan: Allows you to upload specific documentation that may be required for your proposal. You can also refer to the submission guides found on Grants.gov or the National Institutes of Health opportunity.

1) Click the blue Upload link that pertains to the document you need to upload
   a. If you’re not sure what you need to upload, you can click the Completed checkbox (an error message will display, specifying which documents are required)
2) Click the Choose File button.
3) Locate the file on your computer.
4) Click the blue Upload link.
   a. You can view the Original or PDF versions of the document, or Remove it from the list.
5) Repeat this process for any additional documentation that must be attached.
6) Click the Save button, followed by the Completed checkbox.

Performance Sites: This outlines the sites where research will be conducted and is populated based on previous sections.
- Review the information on this page.
- Make any necessary changes.
- Click the Save button, followed by the Completed checkbox.

PHS 398 Cover Page Supplement: This form pre-fills information based on questions you’ve answered in other parts of the proposal.
- Answer any missing questions.
- Click the Save button, followed by the Completed checkbox.

Human Subjects / CT: The new Forms E package includes a new section you must fill out which pertains to Human Subjects and Clinical Trials. This new section will pull in your responses from the Setup Questions and Other Project Info sections you previously filled out.
You would use this form if:
- Your study includes human specimens or data
- Your study includes human subjects
- Your research plan includes delayed onset
- Your study is a clinical trial

For a detailed walkthrough, view this resource from the NIH:
https://www.youtube.com/watch?v=nz9NWFhYOG8

Validation Tool: For NIH submissions we have included a validation feature that allows you to test your package in the system before sending it to NIH. The system will recognize which pieces of your application may potentially be rejected by NIH, allowing you to make those changes before you officially submit.

**Finalize:** The Finalize tab is a final review route where OSRA and other groups will perform a final thorough review of the application, including the final science and all remaining sections, before final submission to the sponsor.

1. Ensure there are blue checkmarks all down the side of the left navigation panel.
2. Click the blue Build button under the Build PDF / Form Pages heading.
   a. Note that if you make any changes to the proposal after this step—even un-checking a Completed checkbox—you will have to rebuild these pages.
   b. It may take a minute to build the pages, depending on the type of proposal you’re submitting.
   c. The table expands with additional information once this step is finished.
3. Click the Build Grants.gov Application button.
4. Click the Thumbs Up icon under the Submit for Internal Review heading.
5. Click the Submit button on the popup window, which outlines the process flow.

**Next Steps:**
- Once the final review of the proposal is completed, OSRA will notify the requester and send the package to the sponsor.
- For Grants.gov applications, the department and OSRA will be able to run Grants.gov validations prior to submission and view the final assembled package as it will later appear in the eRA Commons.
- If there are any required edits, OSRA will return the application for modification. Once complete, the department can resend for final review.
- This process will also be available if the PI would like to make any changes following successful submission, as long as it’s before the grant deadline.

**The Budget**
The Budget tab of the proposal allows you to build your budget right in WRG. You can enter Personnel, whose salary can be released to the budget, as well as their effort. You can also add Non-Personnel costs, Sub Awards, and Sub Projects.

The appearance of the Budget tab may change a bit, depending on the type of proposal you’re submitting, but will contain the same general steps and information to enter.

- Adding Personnel to the Budget
- Entering Personnel Effort (Details)
- Entering Sub Awards Manually
- Importing a Sub Award
Adding Personnel to the Budget

It’s considered best practice to immediately add Personnel to the Budget, which will allow more time for the salary releases to be completed. Complete

1) **Begin typing the name** of the colleague you want to add to the Budget.
   a. **IMPORTANT**: You must select them from the list that populates below the text entry field.
   b. If you need to add personnel to the Budget who are TBD, you can select the Add New Profile button to the left of the text entry field and type in their First and Last name, ensuring Temporary Profile is selected.

2) Select the **Type dropdown** and choose either Key or Non-Key.
3) Select the **Role dropdown** and choose from the list that populates.
4) Click **Add Person**.

Entering Personnel Effort (Details)

The next step will be to enter Personnel Details (effort, salary, fringe, etc).

1) Click the **Detail button** to the left of the name of the Personnel.
a. You may see a note about **Salary Release** populate. If you have the ability to Release the salary there will be a link to do so, otherwise you must wait for the salary to be release by appropriate department personnel.

2) On the Detail tab, enter the effort in the **Calendar** column for Period 1. (Ex: 2.4)
   a. Effort will automatically populate for subsequent periods based on your entry.

3) Click **Save**.

### The Personnel Appointments Tab

This is where you can enter Personnel Appointment information, including Salary. You can also select Fringe Benefits on this tab.

1) Click the **Appointments** tab, ensuring you clicked **Save** to lock in any previous changes.
   a. For most WCM personnel, Appointment information should come in pre-filled.
   b. If this is the case, you can skip ahead to Step 5 and select the Fringe Benefits dropdown.
   c. If no information populates here (ex: TBD Personnel) you can click the Add Appointment button on the right side of the box.

2) **BEST PRACTICE**: Work from left to right to fill out information on the Appointments tab.

3) **Appointment column**: Ensure Calendar is selected from the Type dropdown menu, and enter 12 in the Months entry field.

4) **Appointment Start/End**: The specific dates here aren’t necessarily important, just so long as they equal out to one year. It is considered best practice to enter the employee’s appointment dates, if known, or simply the fiscal year (ex: July 1, 2017 – June 30, 2018).

5) **Base Salary**: Enter the personnel’s base salary in the entry field.

6) **Fringe Benefits**: Make a selection from the dropdown menu. In most cases (except for Manual Entry), an amount will automatically populate in the entry field.

7) Click **Save**.

8) Other features on this page:
   a. **Continue / Recycle / End**: Pertains to action after the end date of the appointment. It is considered best practice to leave this as Recycle.
   b. **Annual Inflation**: You can select this dropdown if you want to opt to include standard inflation between periods.
   c. **Apply Inflation on the Primary Appointment Anniversary Date**: You can check off this box to apply inflation based on the appointment dates entered. This will allow for inflation in the first year should the appointment cycle in the period.
d. **Delete**: Click the Delete icon to delete the appointment from the Budget Details record.

**Other Notes About Entering Personnel**

1) Don’t forget that you can’t enter effort for Weill Cornell personnel you add to the Budget until their salary has been released.

**Entering Non-Personnel Costs (Line by Line)**

The Non-Personnel costs table is where you’ll enter your expenses that don’t pertain to Personnel costs (ex: Equipment, Travel, Publications, etc). You can also click the Add Bulk Entry button to add five expenses at a time.

1) Select the **Budget Category** dropdown at the bottom of the Non-Personnel table and make a selection from the list that populates.
2) Click the **Add Item** button.
3) Enter an amount in the **Total column** for Period 1. Note that it will populate that amount in each corresponding period, so make sure to adjust accordingly if it’s a one-time cost.
4) **Optional**: You can update the name of the expense in the text entry field above the Totals column. However, note that the name of the category is what will appear on the Budget.
5) **Optional**: You can adjust for standard annual inflation by selecting Standard from the Annual Inflation dropdown menu, or you can manually enter inflation in the field.
6) Click **Save and Close** when you’re finished.

**Entering Non-Personnel Costs (Bulk Entry)**

Clicking the Add Bulk Entry button allows you to enter up to five expenses at a time, and may be a quicker way to add multiple expenses to the Budget.

- Click the **Add Bulk Entry** button in the top right corner of the table.
- Select the **Budget Category dropdown** menu and make a selection from the list that populates.
Optional: You can update the name of the expense in the text entry field above the dropdown. However, note that the name of the category is what will appear on the Budget.

- Enter the amount of the expense in the Period 1 box, noting that it will populate that amount in each corresponding period, so make sure to adjust accordingly if it’s a one-time cost.
- Click the Add button in the top right corner of the window.

**Entering Sub Awards Manually**

Sub Awards are initiated when a prime site plans to have a sub-recipient carry out a portion of the work on a grant or contract. A Sub Award must include a clearly defined, intellectually significant scope of work to be performed by the sub-recipient. If you have the Research & Related Budget form, you can opt to Import your Sub Award, which is a much easier way to add it to the Budget.

1. You may have to click [show] next to the SubAwards header.
2. Begin typing the SubAward Institution Name in the corresponding text entry field.
   a. **Important:** You must select from the list that populates beneath the text entry field.
3. Type the name of the SubAward PI is listed in the corresponding text entry field.
4. Click the Add SubAward button.
5. The system automatically generates a SubAward number and title. You do not have to change this. You can simply click Save.
6. Click the Detail button next to Inst/Contractor Name.
7. A new window will pop up where you can manaully enter Personnel and Non-Personnel Costs, and F&A in the corresponding tables.
   a. Consult the instructions above for entering Personnel and Non-Personnel Costs.
8. Click the Budget link in the left navigation menu to return to your Budget.

**Importing a Sub Award**

A far quicker way to add a Sub Award to your Budget is to Import it using the Research and Related Budget form.

- You may have to click [show] next to the SubAwards header.
• Begin typing the **SubAward Institution Name** in the corresponding text entry field.
  o **Important**: You must select from the list that populates beneath the text entry field.
• Click the **Import** button.
• Click the **Choose File** button and locate the PDF form for the SubAward.
• Click the **Upload** button.
• Select the dropdown menus in the **Copy Budget row** to select the Periods you’d like to copy to the Budget. An example of all Periods copied to the Budget can be seen in the image above.
• If the SubAward personnel already exist in WRG-SP, please match up personnel on this page. If not, leave as “New Personnel.”
• Click the Process button in the top right corner of the window.

**Sub Projects**
Sub Projects are an infrequently used feature of the Budget tab. Please consult with your OSRA Grants and Contracts Specialist for more information on this transaction.

**Uploading Budget Justifications**
While you can certainly enter line-by-line Budget Justifications in the Personnel and Non-Personnel sections of the Budget, it is probably far easier to include these Justifications on a single Word document for upload in the Justifications tab on the left navigation menu.

1) Click the **Justifications** link in the left navigation menu.
2) Click the **Choose File** button on the corresponding type of Justification and locate the file on your computer.
3) Click the **Upload** icon 🔄
4) You can confirm the upload was completed because you’ll see the following options appear to the right of the Upload section:

   ![View](image)
   ![Pages](image)
   ![Remove](image)

5) These buttons allow you to view a PDF version of your upload, see the number of pages of the document, and give you the option to Remove the document if you choose.

**Completing the Budget**
Before Completing Your Budget, Make Sure…
- You review the Budget Summary ensuring the numbers match up.
- Salary for all Personnel has been released.
- Effort has been added for all Personnel listed on the Budget
- Justifications for Personnel and Non-Personnel costs have been uploaded either line-by-line or using the Justifications link on the left navigation menu.
1) Click the Complete Budget button in the top right corner of the window.
   a. You’ll notice the button will change to read Un-Complete Budget and a red notification will read ‘You are in view only mode due to budget being completed.’

2) Important: Make sure to click Done in the top left corner to close the Budget window. If you don’t click Done you run the risk of locking the Budget, preventing others from viewing it.

3) After clicking Done, you will be taken back to the Proposal Screen and will notice a blue checkmark next to Budget, indicating it has been completed.

Other Notes About Completing the Budget

- You do have the option to click the Save button in the top left corner of the budget tab if you need to come back to the Budget later.
- Make sure you click the Done button in the top left corner when you’re finished with the Budget, otherwise you risk the Budget being locked.
- You can export the Budget to Excel by clicking the Import/Export button.
- You can export the Budget to PDF by clicking the Build PDF icon.
- You can restrict the view of your Budget to Period by Period if you choose.
- **Modular Budget**: On this screen you can view the modular budget, view the Gap between what you’ve entered on the budget and the module amount, as well as update the number of modules.
- **F&A**: On this screen you can review the F&A rate applied to the budget. For most research grants, the standard federally negotiation rate will apply. Manual entry is available for submissions to agencies with a published rate lower than WCM’s negotiated rate, i.e. the American Heart Association or the Gates Foundation.
- **Budget Justifications**: While you do have the option to enter line-by-line justifications for Personnel and Non Personnel Costs in each of those sections (you’d simply enter them in the Justifications tab), it is probably far easier to compile these justifications on a single document and upload them using the Justifications link on the left navigation menu.
- **Versions**: You can upload different versions of the Budget here. This allows you to view the impact of adding or changing different segments of the Budget without impacting the information you entered.

## Manual Proposal Types

**Non System-to-System Grant**: Financial assistance mechanism providing money, property, or both to an eligible entity to carry out an approved project or activity that are submitted as a manual proposal.

**Sponsored Research Agreement**: A Sponsored Research Agreement (SRA) is a contract between WCM and a non-federal sponsor for the purposes of funding and conducting research at WCM. The SRA governs the scope of work, deliverables, funding and intellectual property terms and conditions of basic and applied research and product development. The SRA can either be sponsor-initiated or investigator-initiated and is generally prepared to reflect the mutual interests of and benefits to the sponsor and WCM.

**Incoming Material Transfer Agreement**: The MTA delineates the individual rights of the provider and WCM with respect to the materials and any derivatives during the performance of research. Frequently transferred materials include biological materials, reagents, cell lines, plasmids, vectors, chemical compounds and mice.

**Data Use Agreement**: A Data Use Agreement (DUA) is a contract that governs the transfer of data outside the context of a Sponsored Research Agreement (SRA) or other agreement. When
WCM enters into a DUA, it shares, receives or transfers de-identified data, limited data sets or fully identifiable data.

Confidentiality Agreement: A Confidentiality Agreement (CDA), also known as a Non-Disclosure Agreement (NDA), is a contract governing the obligations of the parties who receive and/or disclose confidential information. For example, a sponsor may wish to disclose to a WCM faculty member information related to a research project in order to determine if the faculty member will be a suitable PI for the project.

Service Agreement: A Service Agreement is a contract used when WCM is hired to perform, or is hiring an outside party to perform, a service that is not covered by a Sponsored Research Agreement (SRA) or other agreement. A Service Agreement may be used to provide for specialized or professional services or to complete a specific scope of work in a certain field or technique. Depending on the type of work involved, the relationship may be regarded as a Consulting Arrangement. OSRA is responsible for Consulting Agreements where WCM hires a consultant paid from a Sponsored Research Grant or Agreement.

BioPharma Alliance Agreement: To proactively market, generate and structure new opportunities for business development and translational research alliances with industry in order to maximize the participation of WCMC faculty in research collaborations with the life science and biopharma sector in connection with investigator-initiated and investigator-led, pre-clinical, innovation-driven, discovery-oriented research projects with translational potential, around which either (1) IP already exists (aka, background IP); and/or (2) which may give rise to new IP (aka, foreground IP).

Approving Salary Releases

Approving Salary Releases by Email
When a Weill Cornell employee is added to a Budget, a salary release request will be initiated and emailed to that employee. Depending on how a department is structured, this salary release may be sent, additionally, to departmental administration who can release the salary on behalf of the employee.
1) Click the Open Information Release Screen link at the bottom of your email request.
2) Enter your CWID and password on the screen that opens to log in.
3) Note the salary in the bottom box, and select the radio button stating that you either authorize or do not authorize the release of the salary to the proposal.
   a. Note that for NIH applications, the salary cap will feed to the budget if the current base salary is over the cap.
4) Click the Submit button in the top right corner of the screen.

Approving Salary Releases in WRG
In addition to approving through email, you do have the option to approve salary releases in WRG through the Action Items menu.

5) On the homepage of WRG there will be a table containing Action Items for releasing salary releases, select the Action Item for releasing your salary.
   a. Alternatively, if you do not see it, you can click the Action Items or Mailbox link in the top navigation menu to locate your salary release.
6) Note the salary in the bottom box, and select the radio button stating that you either authorize or do not authorize the release of the salary to the proposal.
a. Note that for NIH applications, the salary cap will feed to the budget if the current base salary is over the cap.

7) Click the Submit button in the top right corner of the screen.

Approving Proposals in the Reviewer Dashboard

Depending on where your role sits in the Process Flow for Sponsored Programs, you will receive proposals for review. You can either approve them to the next stage in the Process Flow or return them to the requester for edits.

The approval process is triggered by an email sent to your inbox. You can also see these right in WRG, in your Mailbox and Action Items tabs.

1) In your email, click the Reviewer Dashboard link.
   a. The Reviewer Dashboard will populate in a new window.
2) Click the Review tab on the left side of the screen.
3) Click the links under Form/Document to review the proposal information.
4) Click the Review Status dropdown and make a selection.
   a. Un-Reviewed means you have not looked at the form or document at all.
   b. Reviewed means you have reviewed the form or document.
   c. Not Applicable means the form or document does not apply to you (ex: Reviewer Checklist, which is specific to OSRA reviewers)
5) Click Save in the top right corner after reviewing the proposal form / documents.
6) Enter Comments in the corresponding boxes.
7) Click the My Decision Is dropdown and make a selection.
   a. Approved will move the proposal to the next stage in the approval process.
   b. Return for Edits will send the proposal back to the requester to make your suggested changes.
8) Click Save in the top right corner of the screen.
9) Click OK to confirm.
   a. After clicking Save, and OK to confirm, you’ll see parts of the screen will be grayed out. You can click the Route tab on the left side of the screen to view where the proposal has gone on the route (either to the next stage of approval, or back to the requester to make changes).
Conflicts of Interest

What is the Conflicts of Interest Module?
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.

There are two primary submission types within the Conflicts of Interest module:
1) **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.
   a. **Note**: In the past, Travel Disclosures were a separate transaction accessed through the Conflicts of Interest module. With the most recent upgrade of the transaction, Travel Disclosures are now submitted as part of the Annual Conflicts Survey. Travel disclosures should be submitted by all WCM employees who receive travel support that is not sponsored by Weill Cornell Medicine. Note that all paid or reimbursed travel paid for by “for-profit” entities must be disclosed within 30 days of completing travel.
2) **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 the **Create Initial Conflicts Survey** button.
   a. Note that if you’ve previously submitted a conflicts survey, this button will read **Recertify / Update Conflicts Survey**.
4) On the above page, read over the Policy, Survey Instructions, and Examples of Reportable Interests.

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. Note that if you need to leave the survey before Certification and Submission, you must click the Save button in the top right corner of the screen.

6) If you answer Yes to Question 2, follow the steps below to add your family member:
    a. A popup window will appear after answering Yes.
    b. Select the first letter of your family member’s last name from the top menu.
    c. Type the last name in the Search for a particular entry field.
    d. Select the dropdown menu above the search entry field.
    e. Ensure your family member’s name is selected.
    f. Click the Select button.
    g. You should see your family member listed on the Conflicts Survey.
    h. Optional: Click the +Add button to add any additional family members.

7) If you answer Yes to Question 3, an additional Entities section will open beneath the Primary Questions, which you must fill out.
    a. Scroll down to the Entities section.
    b. Search for your Entity in the text entry field.
       i. As you type a list will populate beneath the entry field. Make your selection from this list.
       ii. 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.

c. Click the +Add button.

d. **Answer the questions** for the entity, noting that answering questions in a certain way may prompt additional branching questions which must also be answered.

e. Answering **Yes** to **Question 12** will expand the **Travel** section where you must add information about expenses reimbursed by the entity for travel.

i. **Travel Start Date**: Click the calendar icon to select the start date of your travel.

ii. Enter the **Destination**, **Duration**, and **Value** reimbursed for your travel.

iii. Click the **dropdown** menu and select a **Purpose** for travel.

iv. Optional: Click the **Add New Row** button to report another line item of travel for this entity.

v. Optional: Click the trash can to the right of the line item to delete the row.

8) Click the **Certification checkbox** to certify your entries.

9) Click the **Submit** button.

a. You should see a timestamp of your submission as well as a PDF icon where you can print a copy of your conflicts survey.
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 **Recertify/Update Conflicts Survey** button.
3. You will still want to review each section of the survey, adding any entities as necessary.
   a. Click the **Certification** checkbox after your review.
   b. You can update details of an existing entity by clicking the **carat** to expand the line item.
   c. You can remove an entity entirely by clicking the **Delete** (trash can) icon.
   d. You can add new entities by following the steps listed in the previous section.
4. All paid or reimbursed travel paid for by “for-profit” entities must be disclosed within 30 days of completing travel.

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 **Edit/Submit Study Specific Report (SSR)** button.
3) **Review** information about the Policy and Survey instructions.
4) Click the **Create New** button.
5) 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.
6) 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.

7) Click the Select button.

8) 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.

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

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

11) Click the Submit button in the top right corner.

Study Specific Report: Additional Notes

1) 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.
<table>
<thead>
<tr>
<th>Created Date</th>
<th>Project Title</th>
<th>Principal Investigator</th>
<th>Grant Number(s)</th>
<th>Protocol Number</th>
<th>Open</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/7/2017 2:48:57 PM</td>
<td>[ Title ]</td>
<td>Investigator, Pete</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
How can I Get 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.
- Conflicts of Interest (including Travel Disclosures and Study Specific Reports)
- Annual Recertification of Conflicts Survey
- Approving Sponsored Programs Submissions

**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 for each section.

**Courses**
We also offer a series of interactive self-paced courses as well as classroom training for certain modules of WRG. You can register for these courses in our learning management system.
- Sponsored Programs – Basics
- Sponsored Programs – Budget

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 **Open a ticket** link at the bottom of the WRG Homepage.  
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.