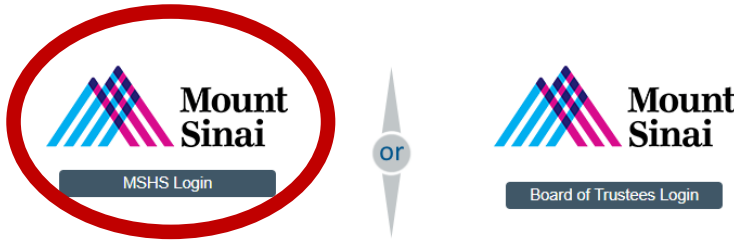




How to Complete a Research Trigger Form in eDMS

In order to initiate a research project, a Triggering Event (TE) must be completed in eDisclosure Management System ([eDMS](#)). Every person listed on the TE will be prompted to review their Disclosure Profile and complete a Research Trigger Form in eDMS through a notification email. [Click here for instructions on how to create a Triggering Event \(TE\) in eDMS.](#)

The Research Trigger Form is used to determine whether any financial interests pose actual or perceived conflicts with a proposed research project. This form is required for every grant and research project/study. The form also requires disclosure of related institutional financial interests. Information on the eDMS Disclosure Profile is imported into this form. [Click here for instructions on how to complete/update your eDMS Disclosure Profile.](#)

For more details on research project specific disclosures, please visit our [COI FAQ page](#).

<p>1. Log into eDMS using your Mount Sinai username and password (https://eDMS.mssm.edu)</p>	
<p>2. Click on the COI tab at top of the page to go to your eDMS Disclosure Profile</p>	
<p>3. If you have just been added to a research project, your Disclosure Profile should be in an Action Required state. The Instruction Center will also indicate an action is required and the reason.</p> <p>Click on “Edit Disclosure Profile” under the Instruction Center</p>	

4. Please review your Disclosure Profile carefully and make any updates as necessary.

Entity Disclosure Information

1. * Do you have any financial interests and/or compensated/un-compensated outside activities to report or update?
NOTE: (i) By clicking “NO” all entities previously disclosed (during the annual cycle or at other times) will be erased.
(ii) If you have been added to a research project, after you review/update your disclosures, click “Continue” to complete this form, submit your attestation, and then answer the Research Trigger project-specific questions.

Yes No [Clear](#)

2. * Entity disclosures: [?](#)

[+ Add](#)

Entity	Foreign Entity?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Ownership (%) Equity	Total Equity	Total Compensation minus Equity	Is Public	Last Modified
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Please note: this is not the Research Trigger Form. You are asked to review your Disclosure Profile and make any changes/updates as necessary. If you already have entities disclosed, please do not select “no” in Question 1, as this will delete all your previously entered information. Please only select “no” if you have nothing to disclose. You will be asked to confirm that you have no financial relationships or outside activities to disclose in the subsequent question before proceeding. Please review the rest of your Disclosure Profile by clicking “Continue” until you reach the Attestation Page.

5. You will need to check the box on the Attestation Page in order to submit your Disclosure Profile.

Attestation upon Completion of COI Disclosure Profile

If you have an open research trigger, it will display on the following view in the ‘Complete Disclosure Profile Update’ activity. If applicable, please open your research project(s) in the “open research triggers” table by clicking “Update”.

* By checking the box below, as a staff/faculty member of the Icahn School of Medicine at Mount Sinai and the Mount Sinai Health System,

- I understand that my duties to Mount Sinai cannot be compromised by my (or my related party’s) financial interests with, or role at, any outside entity.
- I certify that I have read and understand the relevant institutional policies in the Faculty Handbook and/or MSHS Code of Conduct including but not limited to, provisions relating to the Use of the Mount Sinai Name, Business Conflicts of Interest, Financial Conflicts of Interest in Research Policy, Authorship Policy, Intellectual Property, Mount Sinai Non-Insider Trading Policy, Faculty Interaction with Vendors, and Staff Interactions with Vendors and Other Commercial Entities.
- I understand that I am responsible for updating my COI Disclosure Profile throughout the year (within 30 days) if I acquire a new outside financial interest/outside activity or if an existing financial relationship changes.

I attest that this disclosure is an accurate and complete representation of all the outside relationships and related compensation that I and/or my related party (spouse/domestic partner and/or dependent children) have with outside entities.

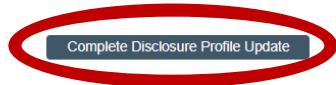
6. To submit your completed/updated eDMS Disclosure Profile, click on Complete Disclosure Profile Update.

Clicking on “Finish” will not submit your disclosure profile. “Finish” will only save your changes and exit out of your disclosure profile. To submit and be taken to your Research Trigger Form, please click on Complete Disclosure Profile Update.

Complete Disclosure Profile

Click the Complete Disclosure Profile Update button to satisfy the following:

Discloser was added to a research project



Discloser manually updated the disclosure profile

Exit
 Save
 Finish

7. Click on **“Update”** next to each Research Project to answer questions about relatedness to your disclosed outside financial interests

Complete Disclosure Profile Update

By completing your disclosure profile update you are verifying that all disclosure information is accurate and current to the best of your knowledge.

1. **Open Research Triggers:** When you are listed as an investigator/co-investigator on a submitted research project, it will display below as an “open research trigger”. As part of the review process, you will need to update each “open research trigger” listed in the table below by clicking “Update”. This will bring you to a series of project-specific questions related to disclosed outside financial interests; your answers to these questions are mandatory and will help determine whether there may be a potential financial conflict of interest related to the research project. ?

Research Project	Event Type	Sponsor	Related Context
 Test Project 3/10/2023	New or Transfer	Icahn School of Medicine at Mount Sinai	
 Test Project 3/12/23	New or Transfer	Abbott	
 Test Project 3/14/23	New or Transfer	Pfizer Inc	

* By checking this box, I certify that all open research trigger information has been updated and provided. All open research triggers must be completed before clicking OK.

OK Cancel

8. Please read the Introduction and complete the Research Trigger Form for each of your open research projects.

Tips for Completing the Research Trigger Form:

- ✓ If you find an interest that is related to your research project and is not appearing on your Research Trigger Form, please return to your eDMS Disclosure Profile and enter this entity in the Entity Disclosure Information Table.

Introduction

You will be asked to review your disclosed financial interests within the context of the current research project in order to identify any possible related financial interests. This is a requirement as per The ISMMS Financial Conflicts of Interest in Research Policy and consistent with Federal Regulations.

Please identify any financial interests you (or a related party) have had over the last 12 months or anticipate having in the next 12 months, which may be related to this project.

Examples of a related financial interest:

- a. Compensated or uncompensated work for the sponsor or another financially interested company (an entity whose financial interests could be affected by the conduct or outcome of this research project)
 - b. Equity ownership interests, including stock and options, in the sponsor or another financially interested company
- Intellectual property rights (e.g., patents, copyrights, or royalties from such rights) OR named inventor on a patent with relevance to the sponsor or another financially interested company




As a reminder, if you find an interest that is not entered in your Disclosure Profile, please return to the SmartForm, and enter this information before proceeding.

9. Once you are done completing/updating all the Research Trigger Forms for each open research project, **check the box** to confirm that you have updated all your open research trigger information appropriately and click **“OK”** – you will not be able to click **“OK”** without checking the box

Complete Disclosure Profile Update

By completing your disclosure profile update you are verifying that all disclosure information is accurate and current to the best of your knowledge.

1. **Open Research Triggers:** When you are listed as an investigator/co-investigator on a submitted research project, it will display below as an “open research trigger”. As part of the review process, you will need to update each “open research trigger” listed in the table below by clicking “Update”. This will bring you to a series of project-specific questions related to disclosed outside financial interests; your answers to these questions are mandatory and will help determine whether there may be a potential financial conflict of interest related to the research project. ?

Research Project	Event Type	Sponsor	Related Context
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 Test Project 3/14/23	New or Transfer	Pfizer Inc	

* By checking this box, I certify that all open research trigger information has been updated and provided. All open research triggers must be completed before clicking OK.

OK Cancel

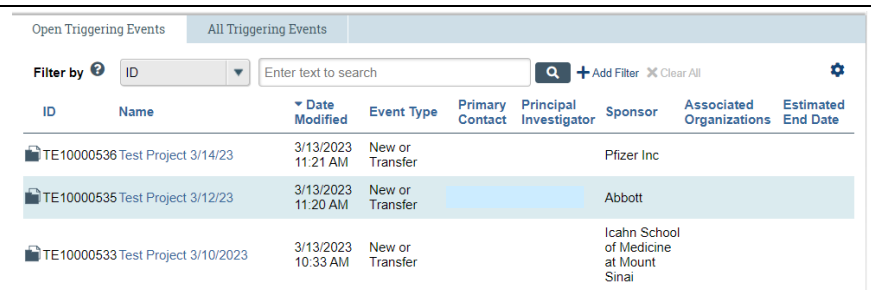
10. Your Disclosure Profile should now be in a state of **No Action Required**

No Action Required

11. To check on the completion status of other research personnel on your research projects OR to edit a Triggering Event (TE), click on **Triggering Events** under the COI tab

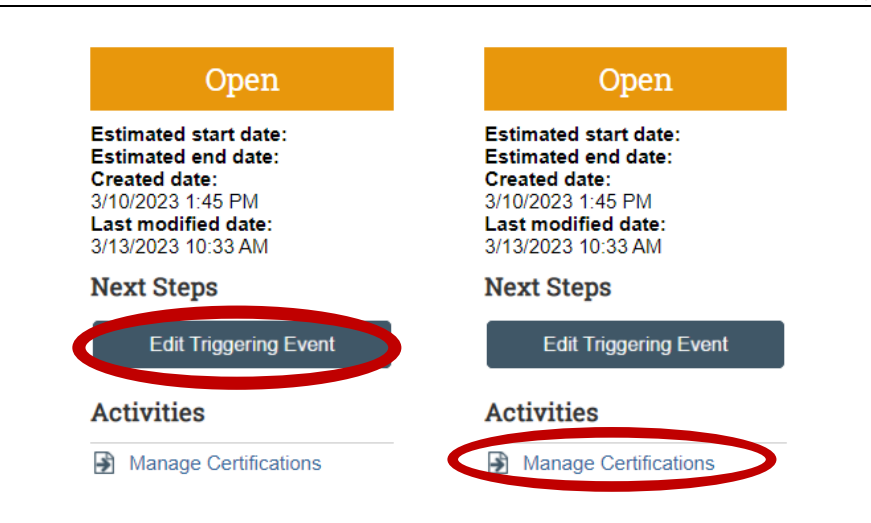


12. To search for your Triggering Event, you may search for and select the appropriate TE from the lists or by using the search bar



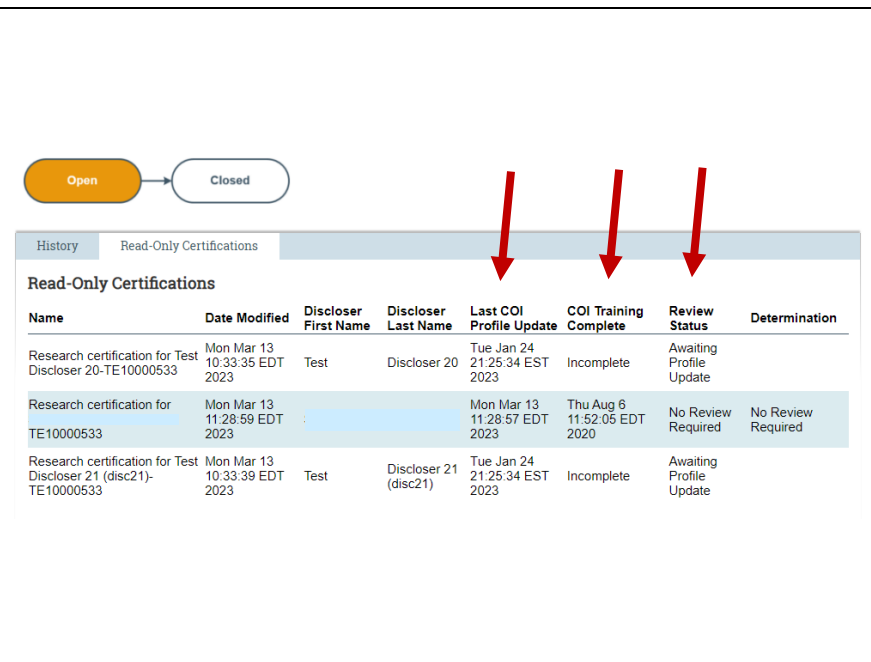
13. To edit a TE, click on **“Edit Triggering Event”** on the left hand side of the TE Summary Page

The PI and PI Designee are able to edit the Triggering Event (e.g., to add or remove research study personnel, to change or make updates to the funding source or study sponsor, etc.) at any time. Once you are done editing/updating your TE, please click on **Manage Certifications**. [Click here for step-by-step instructions on how to edit/create a Triggering Event.](#)



14. To check on the Research Trigger Form completion status of other research personnel on the TE, click on the **“Read Only Certifications”** tab

The Last COI Profile Update column will indicate when the research personnel last updated their Disclosure Profile. The Review Status column will indicate whether the research personnel has completed their Research Trigger Form (“no review required”) or if they still need to complete their Research Trigger Form (“awaiting profile update”). The COI Training Complete column will display the date the CITI COI Training has been completed.



For questions please email the [Office of Industry Engagement & Conflicts of Interest](mailto:Conflicts.of.Interest@mssm.edu) at Conflicts.of.Interest@mssm.edu
 For technical help with login issues, usernames, and passwords, please open a Service Now ticket with Research IT via <https://mountsinaihealth.service-now.com/rait>.