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.

<table>
<thead>
<tr>
<th>1. Log into <a href="https://eDMS.mssm.edu">eDMS</a> using your Mount Sinai username and password</th>
<th><img src="https://icahn.mssm.edu/" alt="Mount Sinai" /></th>
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<td>2. Click on the <strong>COI</strong> tab at top of the page to go to your eDMS Disclosure Profile</td>
<td><img src="https://icahn.mssm.edu/" alt="eDisclosure Management System" /></td>
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<td>3. If you have just been added to a research project, your Disclosure Profile should be in an <strong>Action Required</strong> state. The Instruction Center will also indicate an action is required and the reason. Click on “<strong>Edit Disclosure Profile</strong>” under the Instruction Center</td>
<td><img src="https://icahn.mssm.edu/" alt="Edit Disclosure Profile" /></td>
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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:

   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.

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

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.

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

10. Your Disclosure Profile should now be in a state of 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 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](https://mountsinaihealth.service-now.com/rait).