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.

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<td>1.</td>
<td>Log into <a href="https://eDMS.mssm.edu">eDMS</a> using your Mount Sinai username and password.</td>
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<td>2.</td>
<td>Click on the COI tab at top of the page to go to your eDMS Disclosure Profile</td>
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<td>3.</td>
<td>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 “Edit Disclosure Profile” under the Instruction Center</td>
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4. Please review your Disclosure Profile carefully and make any updates as necessary. You will need to check the box on the Attestation Page in order to submit your Disclosure Profile.

5. 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.

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

8. 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.

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

10. 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.

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

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**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:**
- 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)
- 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.
12. 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.

13. 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 support, please email the Research Administration IT Team at esupport@mssm.edu.