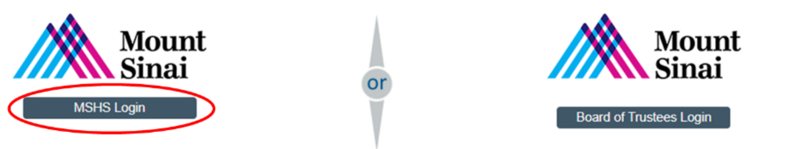
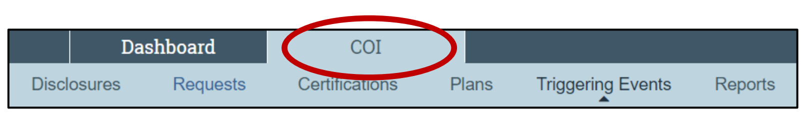
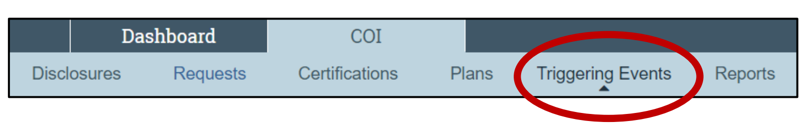
How to add new study personnel to an existing Triggering Event

Office of Industry Engagement and Conflicts of Interest

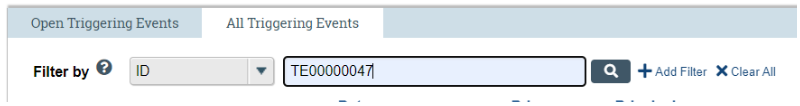
In order to initiate a research project, a Triggering Event (TE) must be completed in eDisclosure Management System (eDMS). Click here for instructions on how to submit a Triggering Event. Every person listed on the TE will be prompted to review their Disclosure Profile and complete a Research Trigger Form in eDMS through a notification email. Information on the eDMS Disclosure Profile is imported into this form. Click here for instructions on how to complete/update your eDMS Disclosure Profile. 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. Click here for instructions on how to complete/update your Research Trigger Form. For more details on managing research conflicts of interest, please visit our COI FAQ page.

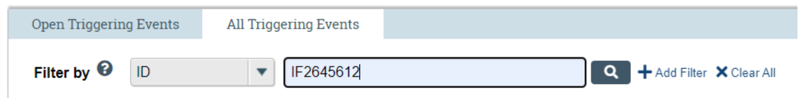
Triggering Events (TEs) may be edited at any time. Only the PI and PI Designee are able to make edits and submit the TE on behalf of the PI. There may be only one PI Designee per Triggering Event, but this role may also be changed at any time.

1. Log into **eDMS** using your Mount Sinai username and password (https://eDMS.mssm.edu)	
2. Click on the **COI tab** at top of the page to go to your eDMS Disclosure Profile	
3. Click on **Triggering Events** under the COI tab. This will show all your Open Triggering Events as well as All Triggering Events	
4. To edit an existing/open Triggering Event, you may	

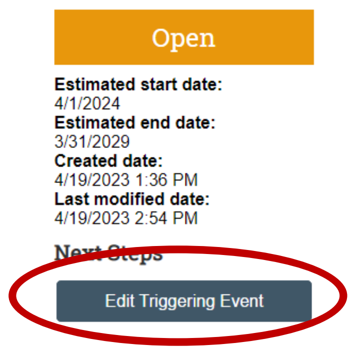
select the appropriate TE from the lists or search for your research project by the TE Number.

If you have an Investigator Form (IF Form) that migrated from Sinai Central, please use the IF Number to search for the research project.

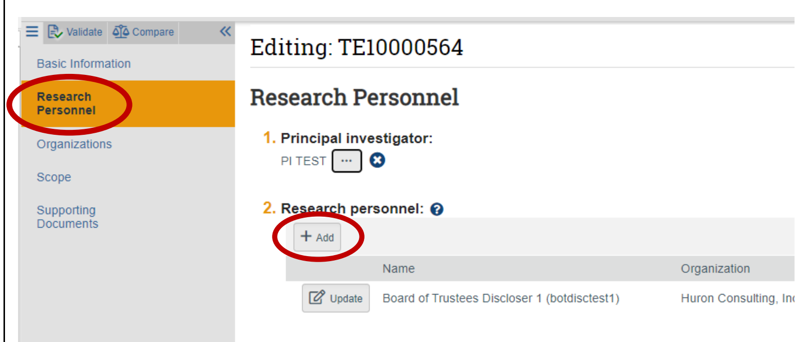




5. Click on **Edit Triggering Event** on the left hand side of the TE summary page



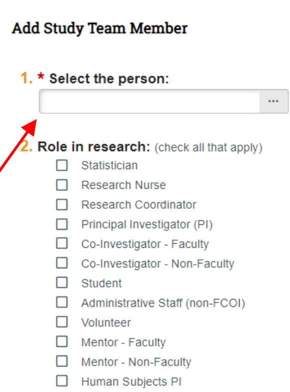
6. Once the triggering event window opens, **click on the "Research Personnel"** tab on the left side of the screen.
7. Click on "add" under research personnel.



8. A new research personnel research will pop up.

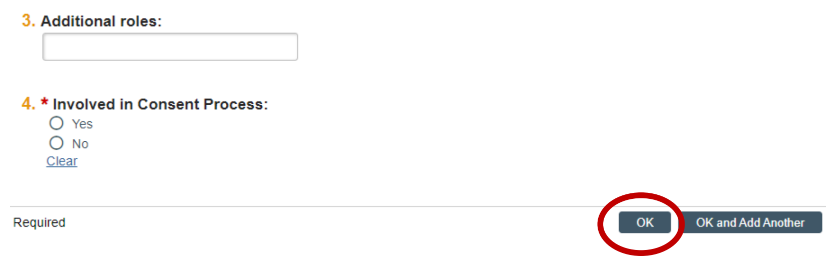
Start typing out the name of the PI Designee and select the appropriate personnel from the list

Tips for Searching Personnel:



- ✓ Use the % wild card to search!
- ✓ Click on the … to search by first or last name – this will generate a full list of personnel from the the organization to select from

9. **Click on "Ok"** once the information on the new personnel has been entered.



10. Review the rest of the Triggering Event Form, and **click on Finish** on the last page of the form (Supporting Documents page)

11. You will be directed back the triggering event summary page.

12. The PI or PI Designee must **click on "Manage Certifications"** in order for the new investigator to be notified that they have been added to a research project and must review their Disclosure Profile and complete their Research Trigger Form.