Overview

- eDisclose vs Disclosure Profile vs COI Review
- Appropriate Completion of a Disclosure Profile
- Management Plan Strategies
- Those with No eDisclose Account
- Contact and Additional Support
What is eDisclose?

eDisclose is a university-wide software system designed for disclosing financial interests and requesting approval for external activities.
What is a Disclosure Profile?

The Disclosure Profile is the focal point of the Huron COI system for the discloser. It provides a summary of the discloser’s external financial interest/relationship and everything that was disclosed previously.
What is a COI Review?

A COI determination for a particular research project that is made when an external financial interest/relationship relates to and could directly and significantly impact or bias the research (or present the perception thereof).
How to Complete a Disclosure Profile

Instructions and Policies

Emory requires you to complete a few simple steps in order to be compliant with its policy and federal regulations. The following steps may be completed within eDisclose:

- Complete this “Disclosure Profile” training when you begin employment and as required by institutional policy.
- Disclose any Significant Financial Interests within 30 days of acquiring or discovering the interest, by completing the financial disclosure form.
- Provide all necessary disclosure information annually. Annual disclosures will be in addition to any disclosures within 30 days of new interests being acquired or discovered.
- Provide any additional information requested as your Disclosure Profile is reviewed.
- If a Management Plan is required, your agreement to the plan must be documented prior to any funding related to your SFI(s) being released. If a Management Plan is in place, you are responsible for all its terms, conditions, and actions.
- You must respond to all requests for information and/or meetings regarding the institution’s responsibility to monitor compliance with the plan.

Even if you have no outside organizations or companies with which you or an immediate family member have a financial relationship you still need to complete the annual disclosure.

Training and Education

Please review the COI training materials below, and certify that you have both read and understand Emory / Emory Healthcare’s COI policies.

Training documents:

- [Emory Policy 7.7 Policy for Investigators Holding a Financial Interest in Research.pdf](#)

Date that you completed your COI Training:
4/27/2022

1. I certify that I have read and understood the education materials presented to me: □
How to Complete a Disclosure Profile

Entity Disclosure Information

1. Entity:

   ![Entity Field]

   or

   If you cannot find the entity in the above list, enter the details here:

   [None]

2. *Relation to Discloser:
   - [ ] Self
   - [ ] Spouse
   - [ ] Dependent Child

3. *Disclosure types:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equity/Ownership</td>
<td>Stock, stock options, or ownership interest</td>
</tr>
<tr>
<td>Consulting or Other Professional Services</td>
<td>Advisory, scientific, advisory board, or research external to this institution, or expert witness services</td>
</tr>
<tr>
<td>Honoraria</td>
<td>Speaking, compensation</td>
</tr>
<tr>
<td>Editorial Services</td>
<td>Journal services, scientific editor services</td>
</tr>
<tr>
<td>Intellectual Property Rights</td>
<td>Fees or royalties from patent, copyright, or license paid directly to individual</td>
</tr>
<tr>
<td>Sponsored Travel</td>
<td>Travel which is paid on behalf of the investigator and not reimbursed to the investigator</td>
</tr>
<tr>
<td>Paid or Unpaid Other Positions</td>
<td>Paid or unpaid (e.g., positions, appointments, fellowships, or talent programs)</td>
</tr>
<tr>
<td>Gifts or Prizes</td>
<td>Prizes or gifts paid directly to Emory or to the investigator to be used for research or affiliated with research (e.g., Nobel Prize, honorary degrees, etc.)</td>
</tr>
<tr>
<td>Research</td>
<td>Research grants or contracts received through other institutions or personally received outside of Emory</td>
</tr>
</tbody>
</table>

4. *Do you have a role in approving at Emory, or its affiliates, the purchase of products or services from this entity?
   - [ ] Yes
   - [ ] No

* Required
How to Complete a Disclosure Profile

Additional Disclosures

1. * Do you supervise anyone who is your spouse, child, parent, sibling, grandparent, aunt, uncle, niece, nephew, cousin, or any of the relations by marriage (e.g. daughter-in-law)?
   - Yes  □  No  □  Clear

2. * Do you, your spouse, or dependent children receive royalties or licensing fees for a book that you have assigned to a class you teach or supervise?
   - Yes  □  No  □  Clear

3. * Are you aware of your lab, division, department, or clinical services receiving any gifts (e.g. money, equipment, services, products, travel, meals) during this reporting year from any company/entity that does business with Emory or Emory Healthcare?
   - Yes  □  No  □  Clear

4. * Do you have current or pending participation in, or applications to, programs sponsored by foreign governments, instrumentalities, or entities, including foreign government-sponsored talent recruitment programs?
   - Yes  □  No  □  Clear

5. Please use this opportunity to disclose any existing or proposed relationship, appointment/employment, transaction, event, or situation, which would require a review per Emory University Policy that is not covered in the preceding questions.
Management Plan Requirements

Requirements stated in the plan must be executed by the Investigator the plan was issued to:

- Acceptance of the management plan
- Disclosure to the research team
Those with No eDisclose Account

ORA Huron User Account Request

Use this form for ORA requests for eIRB, eDisclose and or eACUC user accounts

Is there a different contact person for this request other than the requestor?
- None -

Who is this request for?
- Self
- Someone else

Select each solution needed:
- eIRB
- eACUC
- eDisclose

Notes/Comments

Attachments can be added using the paper clip below.
CONTACT

Email: edisclose@emory.edu