

COI Need to Know

Conflict of Interest and Conflict of Commitment Office
Research Compliance and Regulatory Affairs

May 18, 2023



Overview

eDisclose vs Disclosure Profile vs COI Review

Appropriate Completion of a Disclosure Profile

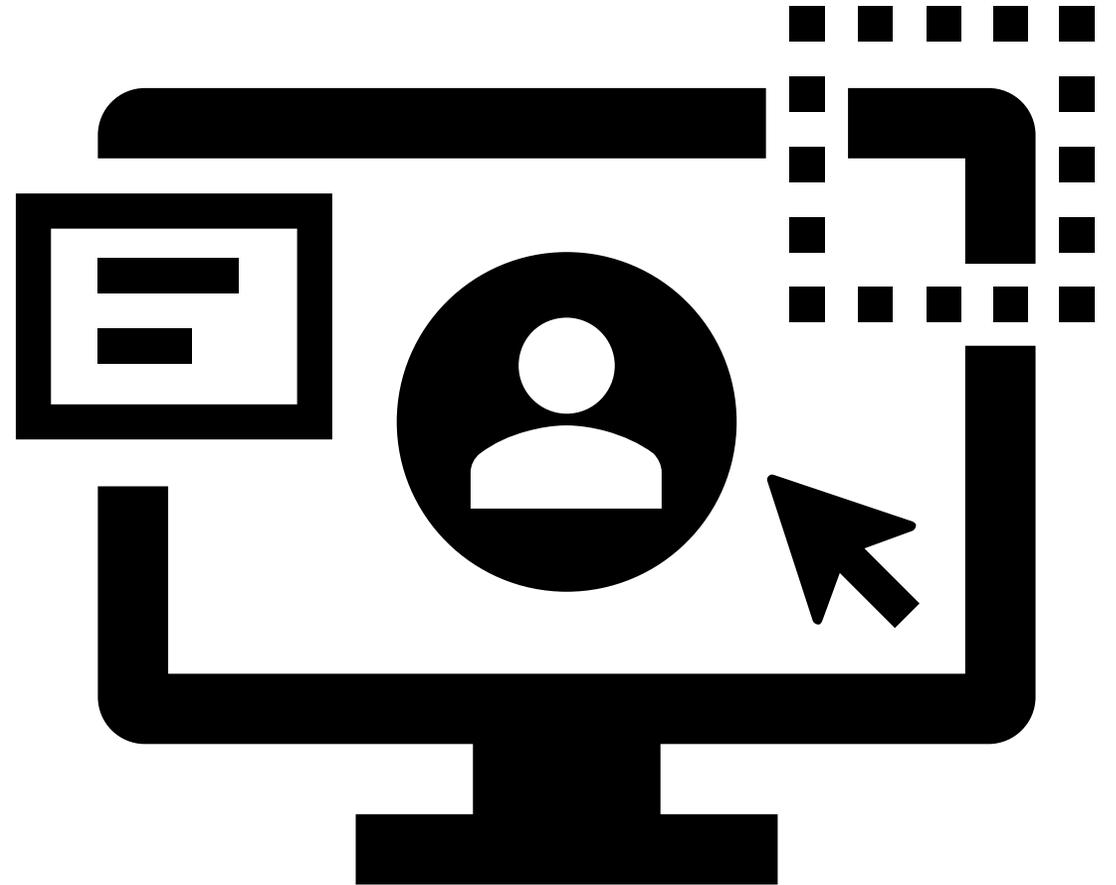
Management Plan Strategies

Those with No eDisclose Account

Contact and Additional Support

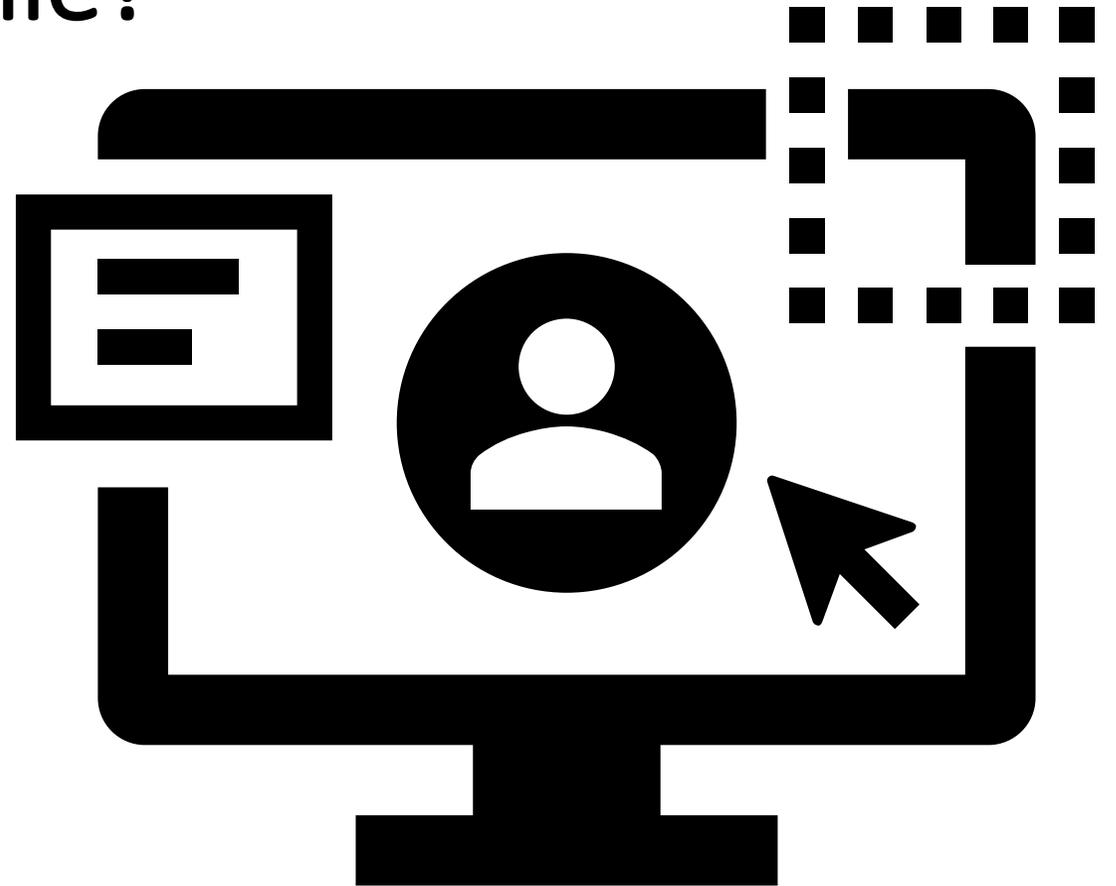
What is eDisclose?

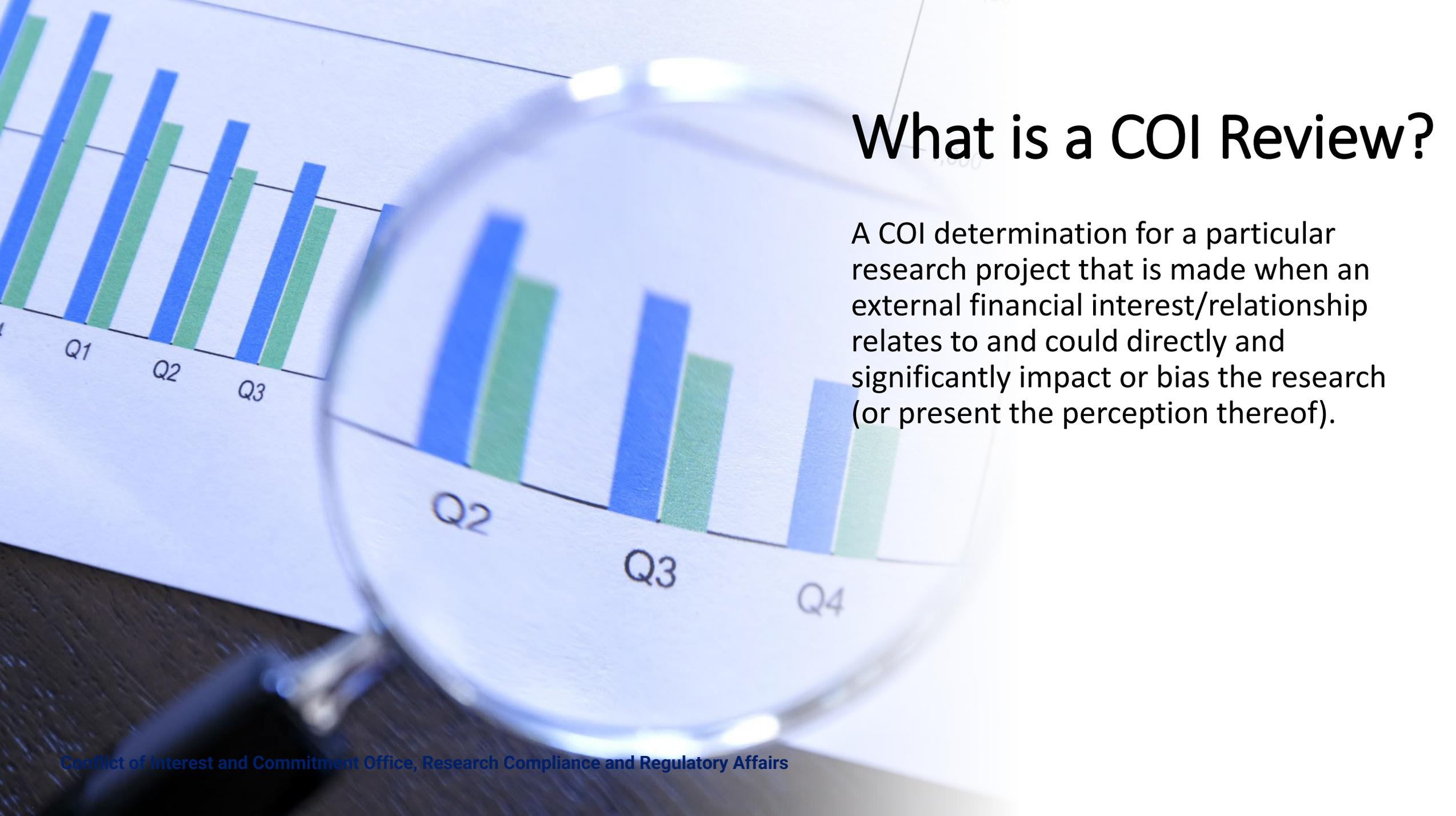
eDisclose is a university-wide software system designed for disclosing financial interests and requesting approval for external activities.



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.



A magnifying glass is positioned over a bar chart. The chart features two data series: blue bars and green bars. The x-axis is labeled with quarters: Q1, Q2, Q3, Q2, Q3, and Q4. The magnifying glass is centered over the second Q2 and Q3, making them the most prominent elements in the image. The background is a light blue gradient.

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\(0.02\)](#)

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

Add Disclosure

Entity Disclosure Information

▼ General Information

1. Entity: ⓘ

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: ⓘ

Name	Description
<input type="checkbox"/> Equity / Ownership	Stock, stock options, or ownership interest
<input type="checkbox"/> Consulting or Other Professional Services	Advisory, scientific, advisory board, or research external to this institution, or expert witness services
<input type="checkbox"/> Honoraria	Speaking, compensation
<input type="checkbox"/> Editorial Services	Journal services, scientific editor services
<input type="checkbox"/> Intellectual Property Rights	Fees or royalties from patent, copyright, or license paid directly to individual
<input type="checkbox"/> Sponsored Travel	Travel which is paid on behalf of the Investigator and not reimbursed to the Investigator
<input type="checkbox"/> Fiduciary Duty / Board Service	Board of directors, board of trustees, partner, owner, officer, management position
<input type="checkbox"/> Outside Employment	Employment external to Emory
<input type="checkbox"/> Other Appointments	Paid or unpaid (e.g., positions, appointments, fellowships, or talent programs)
<input type="checkbox"/> Gifts or Prizes	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.)
<input type="checkbox"/> Research	Research grants or contracts received through other institutions or personally received outside of Emory

4. * Do you have a role in approving at Emory, or its affiliates, the purchase of products or services from this entity?

Yes No [Clear](#)

* Required

OK OK and Add Another Cancel

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.**

✕ Exit

💾 Save

Continue →

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](#)

ORA Huron User Account Request

Use this form for ORA requests for eIRB, eDisclose and or eIACUC 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
 eIACUC
 eDisclose

Notes/Comments 

Attachments can be added using the paper clip below. 



CONTACT

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