Using My Updates

How-To Guide

Insight is Emory University's platform for managing research protocols and related administrative workflows. This document provides step-by-step instructions for using the **My Updates** feature within the **Disclosures** module. It explains how to view previously disclosed external activities or conflicts of interest and manage updates throughout the year. Users are guided through reviewing, editing and submitting changes to their disclosures.

Use My Updates

1. From the menu on the left, click **Disclosures**. *The Disclosures module opens.*
    a. You can also navigate here by clicking **Disclosures** on the Insight home page.
2. In the same menu on the left, click **My Updates**. *The My Updates page open with instructions at the top and a table of our approved external activities below.*
3. The table includes columns for **Entity Name**, date **Last Updated**, **Incomplete** status and an icon to open a **PDF summary** of the disclosure.
4. In the table, locate the **external activity** that requires updating and click **Update**. *The Disclosure form opens with buttons and editable fields to update employment affiliations and related activities.*
5. Make any necessary changes to the form fields. In the panel on the right, use the **Submission Checklist** to identify any missing fields that require updating. *The form is complete, and text under the Submission Checklist reads, "All validations in this area have been completed."*
    a. The **Submission Checklist** will update dynamically with new required tasks as you update form responses.
    b. Documents can be uploaded to this form by dragging and dropping files to the **green upload area** or by clicking **select files from computer** to browse and upload files.
6. Once updates and checklist items are complete, navigate to the bottom right of the screen under **Submitter Actions** and click **Save**.
7. When you are ready to submit, return to **Submitter Actions** and click the **checkbox** that states you have answered fully and to the best of your ability. Then click **Submit**. *The disclosure is updated in Insight.*
8. Click **My Updates** in the menu on the left to return to the summary page. *The updated list of approved external activities displays.*
9. To view the change history, click on the **disclosure** in the table. *A submission history section expands, including the most recent update.*

About My Updates

- External activities are first submitted and approved in the Agreements module. Once approved, they appear in Disclosures.
- In My Updates, you can edit approved disclosures or report new interest tied to existing activities without resubmitting the entire form.
- There are two categories of approved activities that help distinguish current from older interests:
    - **Active or Recently Disclosed Interests**: Interests submitted within the last two calendar years through Agreements, Updates or the Annual Disclosure process.
    - **Historical Interests**: All other previously disclosed interests that fall outside the two-year window.

Additional Resources

- Visit the Project Insight SharePoint page for additional training materials and project updates.