UDisclose System
Triggering Events
Quick Guide

UDisclose System Triggering Events quick guide v.3 updated Sep 2018

https://UDisclose.miami.edu
PI/Proxy Process for Adding or Removing Project Team Members

For each funded award, the Principal Investigator (PI) or his/her Proxy are required to designate team members to funded projects on a Triggering Event within the UDisclose System. This process must be completed in UDisclose by the PI or his/her Proxy for every New or Competing Renewal award received by UM. When there is a Supplement or Non-Competing Renewal, the PI and proxy will be reminded to update the team members on the project.

UM cannot permit funds associated with incoming awards to be dispersed prior to review of the outside interests held by team members on the project. Therefore, team members must be designated, must complete the disclosure process, and their disclosures reviewed and managed (if necessary) in the UDisclose System prior to disbursement of funds associated with incoming awards. Funds spent prior to clearance will not be reimbursed.

- For Human Subject Research (HSR) studies, team members are designated in the eProst (IRB7) system. Please contact the HSR Office Help Desk at eprost@med.miami.edu or 305-243-2314 for assistance.

What do I do?

1. A PI (or Proxy) can access their projects using the Triggering Event link found in the light green tool bar in the UDisclose System.

2. In addition, every time a new project is created in the UDisclose System, the PI and Proxy will receive an email. By clicking on the Project title link, the PI will be directed to the correct Triggering Event workspace in the UDisclose System.
3. Once directed to the Triggering Event workspace, click the **Update Team Members** link on the left tool bar.

4. Team members (only those investigators with substantial responsibility for the design, conduct or reporting) are designated by clicking the **+Add** icon.
   - The PI should not be designated as a team member on a project.
   - Use the X icon (4.1) to remove previously designated team members.
   - Use the checkbox (4.2) at the bottom of the page to indicate that the PI is the sole investigator working on the project.

5. Search for team members by entering the first few letters of each person’s last name in the search box. Select the appropriate investigator after confirming the department or division is correct. Indicate the role that the investigator will perform on the project (5.1).
   - A PI does not need to know a team member’s C-Number to add him/her to a project.

6. A Research Certification will be created for each newly added team member. The system will email each person a notification containing a link to his/her Research Certification for the project.
Checking the Status of Team Members on a Project

The PD/PI (or proxy) can check the status of a project from the “Triggering Events” list.

**What do I do?**

1. From the COI workspace click on **Triggering Events** to view and select your desired triggering event.

2. The status bar of the triggering event page will always display a “draft” status, regardless of the state of team member certifications.

3. You can check the certification status of your team members in the **Personnel** section of the triggering events page.

### Certification Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Individual needs to complete the certification</td>
</tr>
<tr>
<td>In Process</td>
<td>Certification under review</td>
</tr>
<tr>
<td>Reviewed</td>
<td>Review complete</td>
</tr>
<tr>
<td></td>
<td>Management plan satisfied</td>
</tr>
</tbody>
</table>

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### Investigator Process for Certifying Team Membership on a Project

The Research Certification smartform includes the same pages required for annual disclosures, with the addition of a page containing a few questions specifically related to the research project. The investigator will have the ability to add new interests or update/delete any previously disclosed interests at this time.

#### Certifying Team Membership

1. From your **My Inbox** page, select the Research Initiated Certification that you wish to update.

2. Under **My Current Actions**, click **Edit**.

3. Proceed through the smartform to update disclosures, or open the drop down menu to jump to **Research Initiated Certification Information** in order to answer the questions specifically related to the research project.

On the last page, select the check box to submit the certification. Click **Finish**. You can log off the system.
PI Process for Requesting the Creation of a Trigger Event

For each funded award, the Principal Investigator (PI) or his/her proxy are required to designate team members to funded projects on a Triggering Event within the UDisclose System.

There may be times when a PI wishes to begin the project certification process early before the project is listed in the system. Should this occur, the PI or proxy can contact the Office of Disclosures & Relationship Management (DRM) with the InfoEd number, title, PI name, submission type and additional documentation related to the project. Once requested, a Triggering Event will be manually created, the PI assigned, and a notification sent via email. Following this, the PI can log into UDisclose and designate team members to the project.

The DRM can be contacted at DRM@miami.edu or 305-243-0877.

See the "UDisclose System Triggering Events" quick guide for additional instructions.