

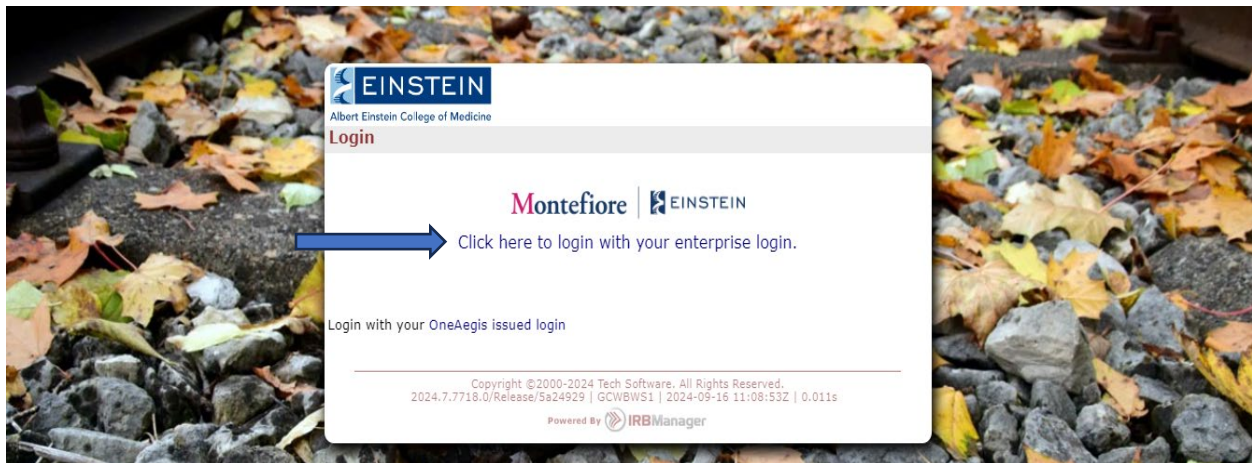
OneAegis Conflict of Interest (COI) Submission Guide

Section 1: Submitting a COI Disclosure Form

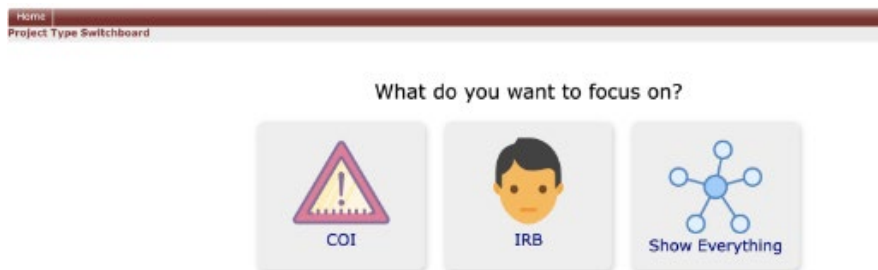
IMPORTANT: The Einstein Conflict of Interest Office will not receive your completed disclosure until you click the “Submit” button at the end of the disclosure form after signing. Please see below on page 5 for more information to ensure your COI disclosure form has been submitted successfully.

For guidance on resuming a previously saved COI disclosure form, refer to “Section 2: Continuing Saved Disclosures” on page 6.

1. Log into OneAegis, <https://einsteinmed.oneaegis.com>, using the “click here to login with your enterprise login” link. Your username is your Einstein/Montefiore email address and password.



2. Click on the COI icon



3. **IF THIS IS YOUR FIRST TIME SUBMITTING A COI DISCLOSURE IN ONEAEGIS:** Select “First time only COI disclosure submission” if this is your first time completing a COI disclosure form in OneAegis. This applies to all first time COI disclosure submissions, even if you’ve previously completed a COI disclosure form in a different system.

Home Meetings Create Project Reports Contacts Administration

My Projects

Reviews 0

Me

First time only COI disclosure submission Start Other xForm

4. **IF YOU HAVE PREVIOUSLY SUBMITTED A COI DISCLOSURE IN ONEAEGIS:** Click “Update COI disclosure here” to update a COI disclosure form you previously submitted. Your previous responses will be copied over so you do not need to enter them again.

Home

My COI

Me

Projects 0

First time only COI disclosure submission - click xForms tab above to continue started/save

About Me

COI, Test
TestCOI@example.com

COI submission year: 2024
Last Login: 10/20/2025 8:07 AM ET

COI Disclosure Form (Draft)

COI, Test
(Amendment)
Complete
Completed on About an hour ago

Update COI disclosure here

- Review the Conflict of Interest Disclosure information on page 1 of the form before proceeding to the General Financial interest questions.

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Collaborators General Financial Interest

View xForm - COI Disclosure Form

➔ (COI) Conflict of Interest Disclosure

Disclosure: Individuals employed as faculty by Einstein, otherwise employed and appointed to the Einstein faculty, subject to Einstein's COI disclosure policy ("Obligated Disclosers") must disclose all **Financial Interests (FI)** and **Relationships with External Entities** at the time of appointment or hiring and at intervals thereafter.

- Einstein requires disclosure of **Financial Interests (FI)** of any value. FI include salary or any remuneration for services.
- Disclosure also must include **Financial Interests (FI)** of a **Related Party** (spouse, domestic partner, or dependent child).
- Disclosure must be complete, timely and truthful.

Individuals who are engaged in PHS-funded research or human subjects research (regardless of funding) must submit COI disclosures on at least an annual basis.

Individuals who are engaged in PHS-funded research or human subjects research (regardless of funding) are required to complete Einstein's COI training course in CITI. The COI training course may be accessed through your CITI account at <https://about.citiprogram.org>.

Investigators must update their COI disclosures immediately upon receipt of any new remuneration, establishment of a new role, or acquisition of any new Intellectual Property.

Please read all of the definitions and new requirements of the Conflict of Interest Disclosure Statement. For further information, please consult Einstein's comprehensive Conflict of Interest Policy.

- If you have financial interests to disclose and serve as an investigator on any research project enter the **Research Project Title**, whether the research is **supported by *PHS (Public Health Services) funds**, whether the research is **supported by other sponsors**, if the research involves **human subjects** and if the research involves **animal** under the General Financial Interest section.

***OF NOTE:** PHS funding agencies include NIH, FDA, AHRQ, CDC, and all other Agency Divisions of Health and Human Services.

- To include an additional **Research Project Title**, click "Add" under the Action section.

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Collaborators General Financial Interest Page 1 of 5 Next

COI Disclosure Form -- General Financial Interest

Research

Do you have a role as Investigator for any research project? Investigator means an individual responsible for the design, conduct, or reporting of research. (Required)

☒ Yes
☐ No

For each project you are an investigator, please provide details below. You must include any sponsored research projects, including those that do not involve human subjects. (Required)

Research Project Title	Is this research project supported by PHS funds?	Is this research project supported by other sponsors?	Does this research project involve human subject research?	Does this research project involve animal research?	Action
The Human Research Study Involving...	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Add

Remember to click "add" in the table after each row entered.

Briefly describe the relationship of each of these research projects to any role, compensation, or ownership interest you have disclosed. (Required)

8. When you have completed the questions on each page, click the “Next” button, which is located at the **top** and **bottom** of the form.

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COI Disclosure Form -- General Financial Interest

Collaborators

General Financial Interest

Page 1 of 5

Next

General Financial Interest Summary

Conflict Disclosed

Today's date (Required)

9/16/2024

When you have completed the questions on this page, click 'Next.' If you wish to return to the form in the future, click 'Save for Later.'

Next Save for Later More

9. If you wish to continue the form at a later time, click the “Save for Later” button.

When you have completed the questions on this page, click 'Next.' If you wish to return to the form in the future, click 'Save for Later.'

Next Save for Later More

10. The dropdown menu located at the top of each page allows you to toggle between various sections of the COI disclosure form: **General Financial Interest, Roles/Compensation in External Entities, Patent and Travel, Foreign Activities** and the **Summary and signature** page.

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View xForm - COI Disclosure Form

Collaborators

Compensation from External Entities

Data Entry

General Financial Interest

Compensation from External Entities

Patents and Travel

Foreign Activities

Summary and Signature

Do you or a Related Party (spouse, partner, or child) have any financial interest in any company or organization, regardless of compensation? If so, you must list it here.

No

Compensation from External Entities

Have you or a Related Party received income from any company or organization external to Einstein that may be related to your institutional responsibilities? Entities listed for Leadership Roles in the preceding question do not need to be listed again here.

11. All applicable sections of the COI disclosure form **must** be completed before signing on the Summary and signature page. If you have **not** completed the required sections, you will receive the following prompt:



Form Validation Messages

Your progress to this point *has been saved*, however you must address the following issues before you can submit this form.
Click on a page name to go to issues on that page.

[General Financial Interest](#)

- Department: - Required.
- Involved in institutional activities PHS - Required.
- Related party financial interest - Required.

[Compensation from External Entities](#)

- Leadership Roles - Required.
- Income from External Entities - Required.
- Private Company Ownership - Required.
- Listed Company Stock Ownership - Required.

[Patents and Travel](#)

- Patents or IP - Required.
- Reimbursed or Sponsored Travel - Required.

[Foreign Activities](#)

- Funding from Foreign Sources - Required.
- Foreign Academic Appointments - Required.
- Collaboration with Foreign Individuals - Required.
- Member of an Advisory Board - Required.
- Foreign Talent Recruitment Programs - Required.
- Travel to Foreign Countries - Required.

12. Once all sections are completed, be sure to sign/acknowledge completion of the COI disclosure form on the bottom of the **Summary and signature** page.

The screenshot shows the 'Summary and signature' page of the Einstein COI Disclosure Form. At the top, there is a header with the Einstein logo, 'Collaborators', a dropdown menu set to 'Summary and signature', 'Page 5 of 5', and a 'Next' button. Below the header, the page title is 'COI Disclosure Form -- Summary and signature'. The main content area includes 'Conflict Disclosed Instructions' with a thank you message, 'Submitter Comments for Reviewer' with a text box for additional comments, and a signature line that says 'By entering your signature, this form is completed to the best of your knowledge: (Required)'. A blue arrow points to a 'Sign...' button at the bottom left of the signature line.

13. After signing the disclosure form, you must click “next” at the bottom of the page, and then click “submit” on the page that follows.

When you have completed the questions on this page, click 'Next.' If you wish to return to the form in the future, click 'Save for Later.'

After clicking 'Next', click 'Submit' to submit the form to the Einstein COI office. The form is NOT SUBMITTED until you click 'Submit' on the next page.

[Previous](#) [Next](#) [Save for Later](#) [More ▾](#)

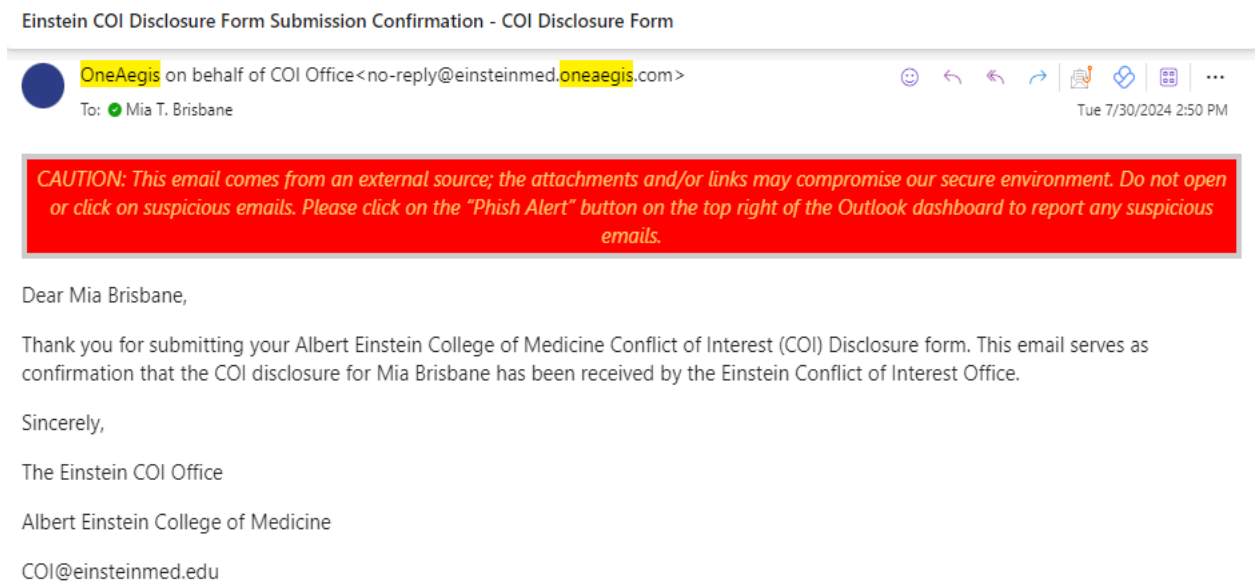
- **IMPORTANT:** The Einstein Conflict of Interest Office will not receive your completed disclosure until you click the “Submit” button.



Form Completed

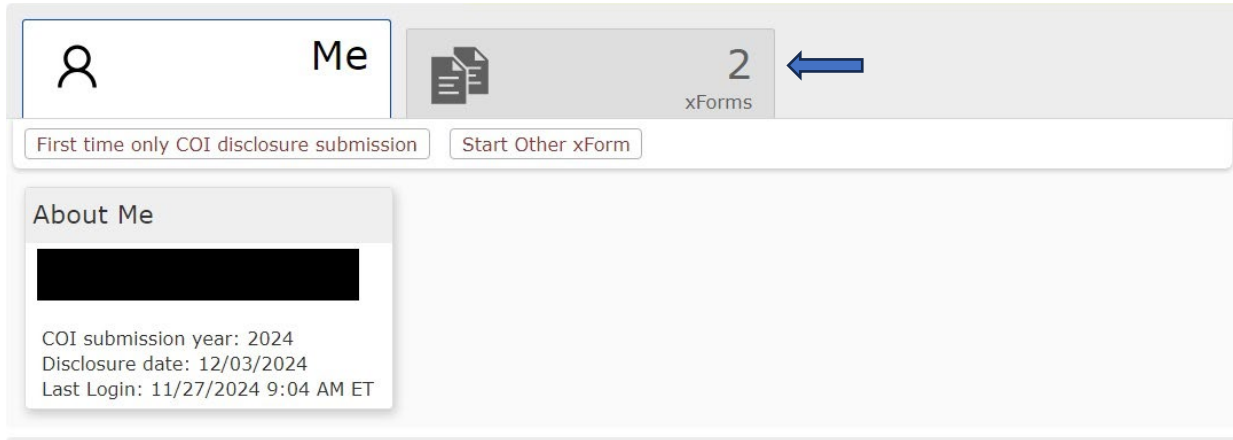
You've completed the form. You can now either save the form for later revision, or submit it. The form will not move forward, until you click "SUBMIT"

14. Upon submission, you will receive the following email confirming receipt of your completed COI disclosure form:



Section 2: Resuming a Saved COI Disclosure Form

1. After logging into OneAegis, you can find saved COI disclosure forms that have not yet been submitted by clicking the tab entitled “xForms.”



The screenshot shows the OneAegis user interface. At the top, there is a navigation bar with a user profile icon and the name 'Me'. To the right of the profile is a tab labeled 'xForms' with a document icon and the number '2'. A blue arrow points to this tab. Below the navigation bar, there are two buttons: 'First time only COI disclosure submission' and 'Start Other xForm'. Below these buttons is a section titled 'About Me' which contains a blacked-out profile picture and the following text: 'COI submission year: 2024', 'Disclosure date: 12/03/2024', and 'Last Login: 11/27/2024 9:04 AM ET'.

2. After clicking the xForms tab, you can view copies of COI disclosure forms that you initiated and saved before submitting. Each saved COI disclosure form will indicate the day on which it was created. To resume a saved COI disclosure form, click the label “COI Disclosure Form.”

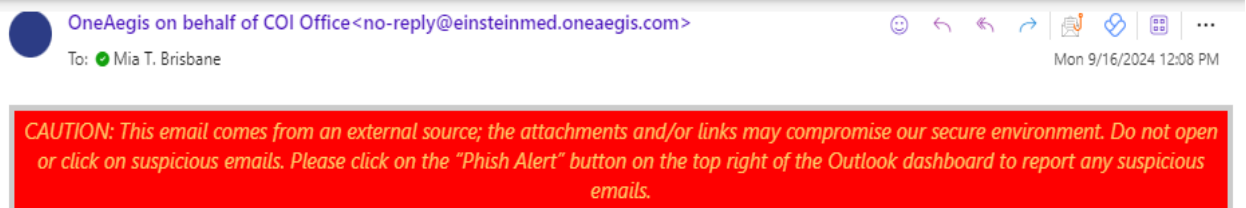


The screenshot shows the OneAegis user interface with the 'xForms' tab selected. The navigation bar at the top shows the 'Me' profile and the 'xForms' tab with a document icon and the number '2'. Below the navigation bar, there are three buttons: 'First time only COI disclosure submission', 'Start Other xForm', and 'Export to Excel'. Below these buttons is a section titled '2 Unsubmitted'. This section contains two cards, each titled 'COI Disclosure Form'. The first card has a blacked-out profile picture, the text 'Data Entry', a blacked-out name, and the text 'Started on 11/27/2024 at 9:04 AM ET'. The second card has a blacked-out profile picture, the text 'Data Entry', a blacked-out name, and the text 'Started on 11/25/2024 at 2:54 PM ET'. A blue arrow points to the 'COI Disclosure Form' title of the second card. At the bottom of the section, there is a button labeled 'All My xForms'.

Section 3: Responding to Clarification Requests

1. Upon review of your disclosure form, Einstein COI Office may request additional information and/or clarification. If so, you will receive the following email. Click on the “COI Disclosure Form” link to access/update your form.

Additional information/clarifications needed on COI Disclosure Form



Dear Mia Brisbane,

The COI Office has received your disclosure form and needs additional information and/or clarifications in order to make a determination regarding your disclosure.

Hello, Mia. Hope all is well. Does the High Flyers conference have anything to do with your MMCH research study? Please advise at your earliest convenience. Thank you

Once you've revised this application, you will need to resubmit it to the COI office. You may access your form here [COI Disclosure Form](#)

Thank you,
COI Office

2. You can amend the form based on the additional information and/or clarification request. If you are **making a change to a table** within the form, you **must** click the green checkmark to save the information.

COI Disclosure Form -- General Financial Interest

☒ Yes
☐ No

For each project you are an investigator, please provide details below (Required)

Research Project Title *	Is this research project supported by PHS funds? *	Is this research project supported by other sponsors *	Does this research project involve human subject research *	Does this research project involve animal research *	Action
Mickey Mouse Clubhouse research study	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	
	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Add

Briefly describe the relationship of each of these research projects to any role, compensation or ownership interest you have disclosed: (Required)

I own stock in ABC, which is the channel that this show comes on. I am also on the advisory board for MMCH. My High Flyers conference in Orlando has nothing to do with this research study.

3. You can also submit additional comments to the COI reviewer on the Summary and signature page before signing the form:

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Summary and signature

Page 5 of 5

COI Disclosure Form -- Summary and signature

Submitter Comments for Reviewer

Please add any additional optional comments for the COI review team here.

I've updated the requested information regarding the High Flyers conference and it's relation to my MMCH research. The two are not related.

By entering your signature, this form is completed to the best of your knowledge: (Required)

Sign...

4. Lastly, you can resubmit the disclosure form for COI review by clicking “Submit”

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Form Complete

Form Completed

You've completed the form. You can now either save the form for later revision, or submit it. The form will not move forward, until you click "SUBMIT"

Go Back Save for Later Print Submit

OR

By selecting “Check & Submit Form” from the dropdown menu located at the top of each page.

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Summary and signature

Page 5 of 5

COI Disclosure Form -- Summary and signature

Disclosure Summary

General financial interest summary
Conflict Disclosed

Role/compensation in external entities summary
Conflict Disclosed

Patent and travel page summary
Conflict Disclosed

Foreign activities summary
No Conflict Disclosed

General Financial Interest
Roles/Compensation in External Entities
Patent and Travel page
Foreign Activities page
Summary and signature
Check & Submit Form

If there are any questions or concerns, please feel free to contact the Einstein COI Office at coi@einsteinmed.edu or 718-430-2237.