Using the electronic Project Specific Disclosure of Financial Interest (eSDFI) Form

The Office of Sponsored Programs (OSP) has replaced the paper SDFI form with the online eSDFI form. The eSDFI is available at: https://sdfi.umassmed.edu/SDFI
This link can be accessed on the OSP forms page as well as the Financial Conflict of Interest (FCOI) forms page.

For questions regarding the eSDFI form, please utilize the extensive FAQ series (highlighted) found at the top of the form. Many of the items addressed include definitions; when to complete the form; and what needs to be reported.
The following page appears when you click on the eSDFI link:

Click on next; Page 2 will appear. Please note that all asterisked (*) items must be filled in.
If you are preparing this form for someone other than yourself, please check the box highlighted below and enter your name and email address. After the remaining fields have been completed click on the next button (also highlighted).

The following page will appear. Click on the Add New Disclosure Investigator Button (highlighted) to add additional investigators to the SDFI if needed.

NOTE: the September 2023 form has added a new, second field, titled “Add New External Investigator.”
As shown below, if the button “Add New Disclosure Investigator” or “Add New External Investigator” is pressed, the fields will need to be filled in before advancing on to the next screen. If either button was pressed mistakenly, simply hit “Cancel” and the fields will disappear.
Once the necessary fields are completed and the “Save” buttons are clicked, the “Next” button is clicked (highlighted) to proceed.

Once the Next button is clicked, you will be taken to the eSDFI Confirmation page where you will be able to review the eSDFI form before sending it to the Investigators. If you need to revise any of the information on the page, click on the Previous button to go back and make revisions. If everything is ok, click on the Send button (highlighted) to distribute the eSDFI form for signatures.
When the “Send” button is clicked, the page below will appear. Please bookmark this page so you can return to check the status (highlighted) of the form and to send reminders.
Recipients will receive a link to the following DocuSign document from the email address of SDFI@umassmed.edu. Begin by clicking on the yellow “START” tab to the left to be taken to the first part of the document to be filled out.
The signer will be moved to the part of the document, below. Answer the questions by FIRST clicking on the yellow “CHOOSE” tab (highlighted), then the appropriate answer. If you do not click on the yellow CHOOSE tab, the answer will not save and you cannot progress to the next question.
After questions 1-3 are answered, you will be taken to the signature line. Fill in as appropriate. Once submitted, the status of the eSDFI form can be checked with the web address previously bookmarked.
By using the bookmarked web address, the eSDFI form’s status can be found under “DETAILLED STATUS.” Note that the status of the form has changed from “sent” to “completed” (highlighted).

Once all disclosing investigators have signed their DocuSign document, the system will send an email to the sdfi@umassmed.edu mailbox to notify OSP that the eSDFI form is complete.

**Questions?**

Questions about the form itself can be directed to **OSP** during office hours (Tuesday and Thursday from 11a – noon) or to your **OSP specialist**.

Questions about disclosure can be directed to **COI** via COI@umassmed.edu