

Create an Engagement

MyCOI-OPA+ is a unified system which streamlines the process of completing disclosures related to both Financial Conflicts of Interest (FCOI) and Outside Professional Activities (OPA). You will report individual **Engagements—professional activities or financial interests--** with external entities which could be or appear to be Reasonably Related to your MIT Institutional Responsibilities.

Once created, an **Engagement may be modified or marked as “Inactive”** but **can never be deleted** as they remain part of your historical record. It is a best practice to create and update your Engagements regularly.

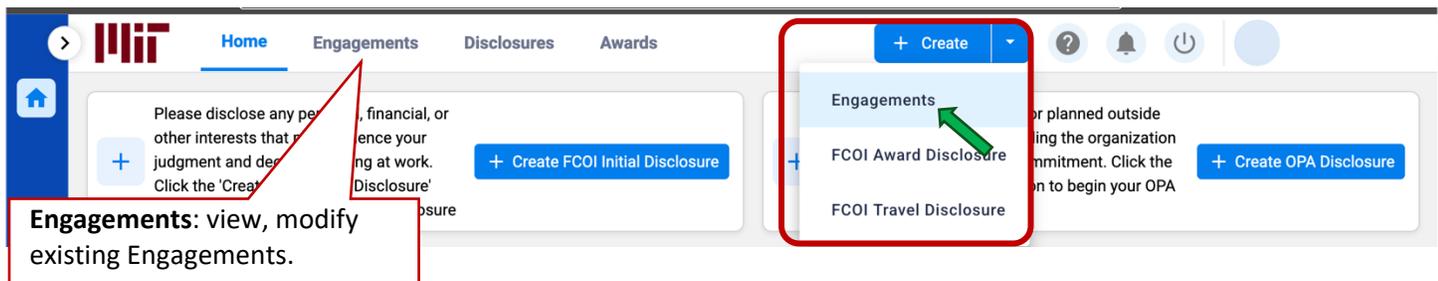
Important Reminder:

Please disclose only those engagements that could be or appear to be Reasonably Related to your MIT Institutional Responsibilities. For example, a consulting role in your field of research; pro-bono service on a scientific advisory board for a company in your discipline; holding ANY equity in a start-up developing technology similar to what your lab works on. **How it works:**

1. **Create an Engagement** by entering the name, country, city (and State, if required) of the external entity.
2. **Answer guided questions** about the nature of your involvement.
3. **Based on your answers or if you have a sponsored research portfolio, MyCOI-OPA+ will indicate if an FCOI or OPA disclosure is required.**

Create Engagement with Entity

1. Go to mycoi-opa.mit.edu and you will be authenticated via **MIT Touchstone**.
2. MyCOI-OPA+ will open to **Home** Dashboard. Click the **+ Create** button and select **Engagement** from the menu.



Entity Name

1. The Engagement screen will open with required fields labeled with a red asterisk *.
2. In the **Entity Name** textbox, begin typing the official name of the entity and the *elastic search* will retrieve potential matches.

The screenshot shows the 'Engagement Name' form. At the top, there are three fields: 'Start date of engagement', 'End date of engagement', and 'Does this entity sponsor your MIT research?'. Below these is the 'Relationship Details' section, which contains the '* Entity Name' field. A green callout box with the text 'Begin by entering the official name of the business or organization' points to the 'Entity Name' input field. Below the input field is a search icon and a note: 'Type in the official name of the business or organization you need to report. Entities to report include foreign, domestic, public or private entities, but not federal agencies.' At the bottom of the form, there are two date pickers: 'Start date of engagement (if known)' and 'End date of engagement (if ongoing, leave blank)'.

Existing Entity Found

3. As you type, potential matches will display in a drop-down menu. **Select the matching entity.**

The screenshot shows the 'Entity Name' dropdown menu. The input field contains 'orb'. A green callout box with the text 'List of potential matches for entity name is generated' points to the dropdown list. The list contains the following entries:

- Orbital Materials Ltd. | Oak House, Tanshire Park, Shackleford Road | Elstead | | United Kingdom
- Pola Orbis Holdings Inc. | 1-7-7, GinzaPola Ginza Bldg Chuo-Ku | Tokyo | | Japan
- In Orbit Aerospace Inc. | 1990 Del Amo Blvd, Ste A | Torrance | California | United States
- Orbital Gateway Consulting LLC | 18 Luard Road Suite 7B, Wanchai | Hong Kong | | China

A green arrow points to the first entry with the text 'Click to select organization/entity'. At the bottom of the dropdown, there is a note: 'Select your Entity from the dropdown. If no match is found, Click here to add "orb" as a new Entity.'

4. Review **Entity Details** in the pop-up window, including Address and DUNS Number, if available. Click the **Confirm** button if this is the correct entity. Click the **Cancel** button to return to the entity search.

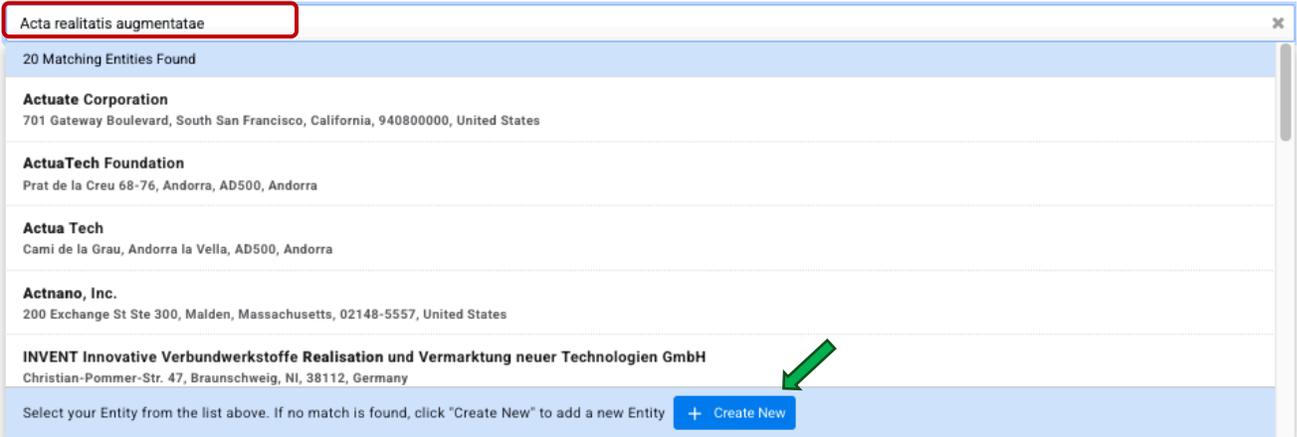
The screenshot shows the 'Entity Details' pop-up window for 'Orbital Materials Ltd.'. A red callout box with the text 'International flag indicates a multinational entity.' points to the 'International' flag icon. The window displays the following information:

- Orbital Materials Ltd.** (International flag)
- Ownership Type: Unknown | Business Type: -- | Entity Type: --
- Address:** Oak House, Tanshire Park, Shackleford Road
- City:** Elstead | **State/Province/Region:** -- | **ZIP/Postal Code:** -- | **Country:** United Kingdom
- DUNS Number:** 229493062 | **UEI Number:** -- | **CAGE Number:** -- | **Website:** --

At the bottom of the window, there are two buttons: 'Cancel' and 'Confirm'. A green arrow points to the 'Confirm' button.

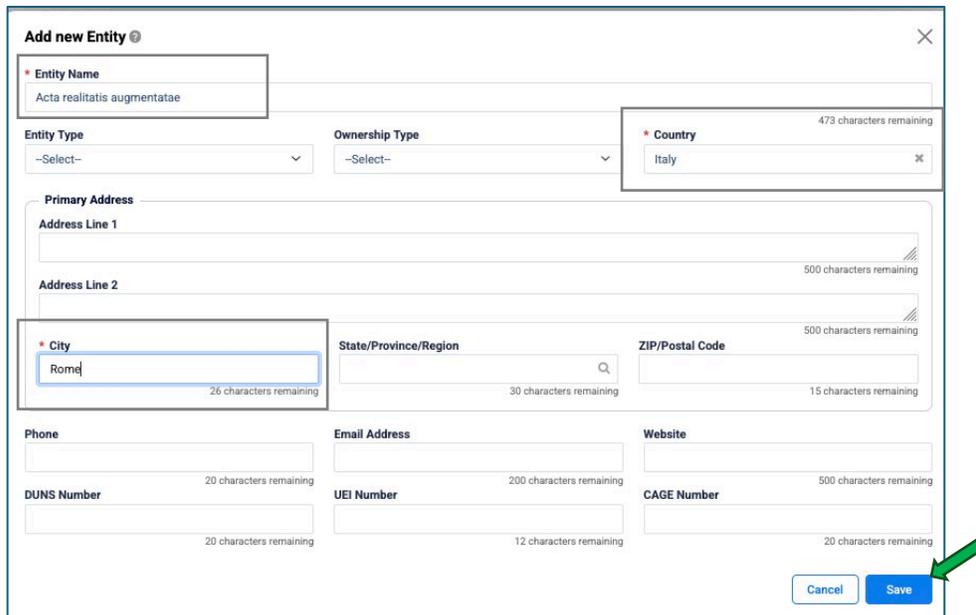
Entity Not Found – Create New Entity

5. If the Entity Name elastic search does not retrieve the correct organization in the list of potential matches, click the **+Create New** button.



The screenshot shows a search interface with the text 'Acta realitatis augmentatae' in a search box. Below the search box, a list of 20 matching entities is displayed. The entities listed are: Actuate Corporation (701 Gateway Boulevard, South San Francisco, California, 940800000, United States), ActuaTech Foundation (Prat de la Creu 68-76, Andorra, AD500, Andorra), Actua Tech (Cami de la Grau, Andorra la Vella, AD500, Andorra), Actnano, Inc. (200 Exchange St Ste 300, Malden, Massachusetts, 02148-5557, United States), and INVENT Innovative Verbundwerkstoffe Realisation und Vermarktung neuer Technologien GmbH (Christian-Pommer-Str. 47, Braunschweig, NI, 38112, Germany). At the bottom of the list, there is a blue button labeled '+ Create New' with a green arrow pointing to it.

6. The **Add New Entity** window will display with the previously entered **Entity Name** in the textbox (you may modify). In the **Country** textbox, begin typing the name of the country and **select from the search results** in the dropdown menu. Enter additional required fields, such as **City**, that are marked with a red asterisk. Click the **Save** button.



The screenshot shows the 'Add new Entity' form. The 'Entity Name' field contains 'Acta realitatis augmentatae'. The 'Country' dropdown menu is open, showing 'Italy' selected. The 'City' field contains 'Rome'. The 'Save' button is highlighted with a green arrow.

Note, after a New Entity is submitted, MyCOI-OPA+ Compliance will confirm the Entity Name, Country, Ownership Type, Address, and DUNS Number and update as needed.

Engagement - Relationship Details

1. In the *Relationship Details* screen, answer the questions, including five **Yes/No** required questions marked with a red asterisk (*), then click **Proceed**. Each question includes help text in a shaded box marked with an information icon . Text may include links to policy and guidance.

Start date of engagement (If known) End date of engagement (If ongoing, leave blank)

*** This engagement is teaching in MIT's executive, professional, international, or other special or summer programs**

An MIT Professional Activity (MPA) is defined as Compensated teaching at MIT EDx, MIT Professional Education, Sloan Executive Education, and other MIT-run and authorized non-degree, professional programs. MPAs must be disclosed to the Institute.

Yes

No

*** This engagement is part of my Institutional Responsibilities and is with a foreign entity (therefore I am disclosing it to MIT)**

For example, serving as an advisor/editor to a domestic, peer-reviewed journal in your academic discipline is considered a part of your institutional responsibility not an OPA but if it's a foreign journal, it is required to be disclosed to MIT (see [Institutional responsibilities](#)) but is not considered an OPA.

Yes

No

*** Does this entity sponsor your MIT research?**

Yes

No

*** Are you compensated or do you have other financial interests (direct or indirect) related to this engagement?**

Includes compensation (e.g., salary, honoraria, consulting fees, equity, royalties) or financial interests (e.g., stock, ownership) received by you, a family member, or through a business, trust, or other entity you control. "Indirect" interests refer to benefits that are not paid directly to you but may still influence your objectivity or create a conflict, such as interests held by a family member or a company you have a stake in.

Yes

No

*** Is this an outside professional activity, that may be, or appears to be, reasonably related to your MIT Institutional Responsibilities?**

Select "yes" if you actively spend time on this engagement (e.g., consulting, advising, attending meetings). Select "no" if it is a passive interest only, such as holding equity or a family member's investment with no active time commitment on your part.

Yes

No

Responses to the Yes/No questions will determine additional detail questions that are required, in which disclosures (FCOI/OPA) the engagement will be included, and the Relationship label(s) that will display for the engagement in the disclosure for certification and review when submitted (See the following section for details).

**Relationship: Engagement Type (Yes/No) Questions
Impact on Additional Requirements, Disclosures, and Labels**

MIT Professional Activity (MPA)

This engagement is teaching in MIT's executive, professional, international, or other special or summer programs.

An MIT Professional Activity (MPA) is defined as Compensated teaching at MIT EDx, MIT Professional Education, (or other Sloan courses where payment is allowed), Sloan Executive Education, and other MIT-run and authorized non-degree, professional programs. MPAs must be disclosed to the Institute.

Answering **YES**:

- No additional *Engagement* or *Financial* details required/allowed, even if questions related to Compensation or Outside Professional Activity are answered "Yes"
- Included in OPA disclosure
- Labeled **MPA** in OPA disclosures
- Cannot be edited once saved (must **Inactivate** and recreate if incorrect)

Type in the official name of the business or organization you need to report. Entities to report include foreign, domestic, public or private entities, but not federal agencies.

MIT PROFESSIONAL EDUCATION
Ownership Type: Unknown | Business Type: - | Entity Type: US Institution of Higher Education, Research, Medical Center, Academic Teaching Hospital

Address
700 Technology Sq Ste 1

City Cambridge	State/Province/Region Massachusetts	ZIP/Postal Code --	Country United States
DUNS Number 079959167	UEI Number -	CAGE Number -	Website -

Start date of engagement (If known) End date of engagement (If ongoing, leave blank)

*** This engagement is teaching in MIT's executive, professional, international, or other special or summer programs**

An MIT Professional Activity (MPA) is defined as Compensated teaching at MIT EDx, MIT Professional Education, Sloan Executive Education, and other MIT-run and authorized non-degree, professional programs. MPAs must be disclosed to the Institute.

Yes

No

Institutional Responsibility with a foreign entity (Foreign Non-OPA)

This engagement is part of my Institutional Responsibilities and is with a foreign entity (therefore I am disclosing it to MIT)

For example, serving as an advisor/editor to a peer-reviewed journal in your discipline is considered part of Institutional Responsibilities and is not an OPA; when the journal is based abroad, however, it requires a disclosure to the Institute which is achieved through this form.

Institutional Responsibilities refer to the duties and responsibilities associated with an Investigator's or other individual's MIT appointment or position, such as research; teaching; administration; conference attendance, research presentations or lectures at other universities; uncompensated publication review; and service on MIT committees. To clarify, scholars' activities within their disciplines can differ significantly, with common examples including peer review of research, service roles in professional or academic organizations, community outreach and enrichment, and K-12, STEM or other educational initiatives.

Answering **YES**:

- No additional *Engagement* or *Financial* details required/allowed, even if questions related to Compensation or Outside Professional Activity are answered "Yes".
- Included in **OPA** disclosure
- Labeled **Foreign Non-OPA** in OPA disclosures.
- Cannot be edited once saved (must **Inactivate** and recreate if incorrect)

Acta realitatis augmentatae

Start date of engagement 04/01/2026	End date of engagement --	Does this entity sponsor your MIT research? No
--	------------------------------	---

City: Rome, State/Province/Region: --, ZIP/Postal Code: --, Country: Italy

DUNS Number: --, UEI Number: --, CAGE Number: --, Website: --

Start date of engagement (If known) 04/01/2026	End date of engagement (If ongoing, leave blank) MM/dd/YYYY
---	--

* This engagement is teaching in MIT's executive, professional, international, or other special or summer programs

Yes
 No

* This engagement is part of my Institutional Responsibilities and is with a foreign entity (therefore I am disclosing it to MIT)

Yes
 No

Entity sponsors your MIT research

Does this entity sponsor your MIT research?

Answering **YES**:

- No additional *Engagement* or *Financial* details required
- Does not determine in which disclosure(s) engagement is included
- Does not label engagement

Spacely Space Sprockets, Inc.

Start date of engagement: -- End date of engagement: -- Does this entity sponsor your MIT research? No

*** This engagement is teaching in MIT's executive, professional, international, or other special or summer programs**
 ⓘ An MIT Professional Activity (MPA) is defined as Compensated teaching at MIT EDx, MIT Professional Education, Sloan Executive Education, and other MIT-run and authorized non-degree, professional programs. MPAs must be disclosed to the Institute.
 Yes
 No

*** This engagement is part of my Institutional Responsibilities and is with a foreign entity (therefore I am disclosing it to MIT)**
 ⓘ For example, serving as an advisor/editor to a domestic, peer-reviewed journal in your academic discipline is considered a part of your institutional responsibility not an OPA but if it's a foreign journal, it is required to be disclosed to MIT (see [Institutional responsibilities](#)) but is not considered an OPA.
 Yes
 No

*** Does this entity sponsor your MIT research?**
 Yes
 No

Compensated / Significant Financial Interest (SFI) if >\$5,000

Are you compensated or do you have other financial interests (direct or indirect) related to this engagement?

Includes compensation (e.g., salary, honoraria, consulting fees, equity, royalties) or financial interests (e.g., stock, ownership) received by you, a family member, or through a business, trust, or other entity you control. "Indirect" interests refer to benefits that are not paid directly to you but may still influence your objectivity or create a conflict, such as interests held by a Family member, or a company you have a stake in.

Answering **YES**:

- Engagement Details and Financial details required.
- If total compensation >\$5,000 and you have a sponsored research portfolio, will be included in FCOI disclosure
- Labeled **Compensated** and **SFI** (if > \$5,000) in OPA and/or FCOI disclosures.

Spacely Space Sprockets, Inc.
 Ownership Type: -- | Business Type: -- | Entity Type: --

Address: --

City	State/Province/Region	ZIP/Postal Code	Country
Orbit City	Texas	--	United States

DUNS Number	UEI Number	CAGE Number	Website
--	--	--	--

Start date of engagement (If known): MM/dd/YYYY End date of engagement (If ongoing, leave blank): MM/dd/YYYY

*** This engagement is teaching in MIT's executive, professional, international, or other special or summer programs**
 ⓘ An MIT Professional Activity (MPA) is defined as Compensated teaching at MIT EDx, MIT Professional Education, Sloan Executive Education, and other MIT-run and authorized non-degree, professional programs. MPAs must be disclosed to the Institute.
 Yes
 No

*** This engagement is part of my Institutional Responsibilities and is with a foreign entity (therefore I am disclosing it to MIT)**
 ⓘ For example, serving as an advisor/editor to a domestic, peer-reviewed journal in your academic discipline is considered a part of your institutional responsibility not an OPA but if it's a foreign journal, it is required to be disclosed to MIT (see [Institutional responsibilities](#)) but is not considered an OPA.
 Yes
 No

*** Does this entity sponsor your MIT research?**
 Yes
 No

*** Are you compensated or do you have other financial interests (direct or indirect) related to this engagement?**
 ⓘ Includes compensation (e.g., salary, honoraria, consulting fees, equity, royalties) or financial interests (e.g., stock, ownership) received by you, a family member, or through a business, trust, or other entity you control. "Indirect" interests refer to benefits that are not paid directly to you but may still influence your objectivity or create a conflict, such as interests held by a family member or a company you have a stake in.
 Yes
 No

*** Is this an outside professional activity, that may be, or appears to be, reasonably related to your MIT Institutional Responsibilities?**
 ⓘ Select "yes" if you actively spend time on this engagement (e.g., consulting, advising, attending meetings). Select "no" if it is a passive interest only, such as holding equity or a family member's investment with no active time commitment on your part.
 Yes
 No

Outside Professional Activity (OPA)

Is this an outside professional activity, that may be, or appears to be, reasonably related to your MIT Institutional Responsibilities?

Select “yes” if you actively spend time on this engagement (e.g., consulting, advising, attending meetings). Select “no” if it's a passive interest only, such as holding equity or a Family member's investment with no active time commitment on your parts.

Answering YES:

- Engagement Details required.
- Included in OPA disclosure
- Labeled **OPA** in disclosures.

Realitates investigations
Ownership Type: - | Business Type: - | Entity Type: -

Address
-

City Pheonix	State/Province/Region Arizona	ZIP/Postal Code -	Country United States
DUNS Number -	UEI Number -	CAGE Number -	Website -

Start date of engagement (If known)
MM/dd/YYYY

End date of engagement (If ongoing, leave blank)
MM/dd/YYYY

*** This engagement is teaching in MIT's executive, professional, international, or other special or summer programs**

i An MIT Professional Activity (MPA) is defined as Compensated teaching at MIT EDx, MIT Professional Education, Sloan Executive Education, and other MIT-run and authorized non-degree, professional programs. MPAs must be disclosed to the Institute.

Yes
 No

*** This engagement is part of my Institutional Responsibilities and is with a foreign entity (therefore I am disclosing it to MIT)**

i For example, serving as an advisor/editor to a domestic, peer-reviewed journal in your academic discipline is considered a part of your institutional responsibility not an OPA but if it's a foreign journal, it is required to be disclosed to MIT (see [Institutional responsibilities](#)) but is not considered an OPA.

Yes
 No

*** Does this entity sponsor your MIT research?**

Yes
 No

*** Are you compensated or do you have other financial interests (direct or indirect) related to this engagement?**

i Includes compensation (e.g., salary, honoraria, consulting fees, equity, royalties) or financial interests (e.g., stock, ownership) received by you, a family member, or through a business, trust, or other entity you control. "Indirect" interests refer to benefits that are not paid directly to you but may still influence your objectivity or create a conflict, such as interests held by a family member or a company you have a stake in.

Yes
 No

*** Is this an outside professional activity, that may be, or appears to be, reasonably related to your MIT Institutional Responsibilities?**

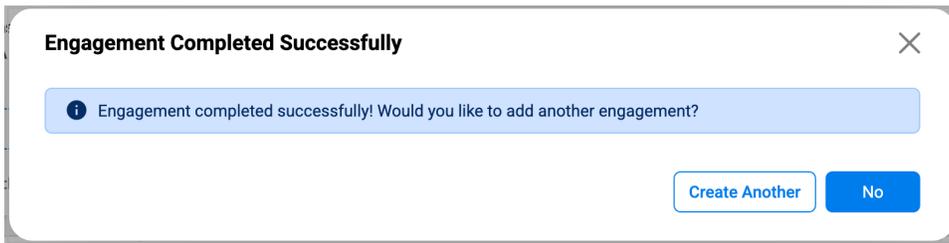
i Select "yes" if you actively spend time on this engagement (e.g., consulting, advising, attending meetings). Select "no" if it is a passive interest only, such as holding equity or a family member's investment with no active time commitment on your part.

Yes
 No

Proceed

After completing the Yes/No questions, click **Proceed**. If Engagement details are required, the details screen will appear.

If the Engagement type is **MPA** (MIT Professional Activity) or **Foreign Non-OPA**, you will receive a confirmation pop-up indicating the engagement is complete.



Engagement Details

1. The top of the screen indicates the Engagement is currently **Incomplete**. Tabbed questionnaires for **Engagement Details** and **Financial Details** if required based on your prior responses, will display. For contextual help on any question, click the **i** icon. Your responses are autosaved.
2. Responses to the Relationship Yes/No questions display in the Engagement Details screen. Answers that you provided to the questions on MIT Professional Activities (**MPA**) and **Foreign Non-OPA** are grayed out and cannot be modified.

Note: Click the 3-ellipses button and select **Inactivate** if you don't want to proceed with completing this Engagement.

Ford Motor Company
Ownership Type: Unknown | Business Type: -- | Entity Type: --

Incomplete Version 1 (Active)

Close Proceed

← Previous Complete Engagement →

Engagement Details Financial Details History

Start date of engagement (if known) MM/dd/YYYY

End date of engagement (if ongoing, leave blank) MM/dd/YYYY

This engagement is teaching in MIT's executive, professional, international, or other special or summer programs? **i**

Yes
 No

This engagement is part of my Institutional Responsibilities and is with a foreign entity (therefore I am disclosing it to MIT) **i**

Yes
 No

Does this entity sponsor your MIT research?

Yes
 No

Are you compensated or do you have other financial interests (direct or indirect) related to this engagement? **i**

Yes
 No

Is this an outside professional activity, that may be, or appears to be, reasonably related to your MIT Institutional Responsibilities? **i**

Yes
 No

*What is the business focus of this entity? **i**

Please briefly describe the main products, services, or activities of the entity.
Examples: developing novel cancer therapies using gene editing, providing data analytics and AI solutions for healthcare, offering regulatory consulting for medical devices, manufacturing advanced imaging equipment for hospitals, managing investment portfolios focused on sustainable technologies.

Prior responses to *MPA* and *foreign Non-OPA* (institutional responsibility) questions cannot be edited.

3. Complete each of the required questions marked with a red asterisk (*) including those described below.
4. If your engagement involves **Students or Staff/Subordinates**, click + **Add Row** and enter:
 - **Name**
 - **Type of work performed**
 - Your **Relationship with Student or Staff/Subordinate**.

* Does your engagement with this entity involve staff/subordinates? ⓘ

Yes
 No

* Provide details for each staff/subordinate

Name	Type of Work Performed	Relationship with Staff/Subordinate	Action
Theo Cleaver, PhD	co-author of presentation	Lab director	

[+ Add Row](#)

Click + Add Row if you have another person to report

5. Click on the ⓘ icon for questions such as ‘how is the work of this engagement separate and distinct from your Institutional Responsibilities?’ for examples of how to fully respond.

* How is the work of this engagement separate and distinct from your Institutional Responsibilities? ⓘ

Separate and Distinct means that while your MIT work provides the foundation for your expertise, the outside activity is clearly differentiated both intellectually and technically, as well as in how and when it is performed, to ensure it remains independent of your MIT Institutional Responsibilities. This distinction helps avoid conflicts of commitment and maintains the integrity of both roles. Specifically, the work:

- Occurs outside your MIT Institutional Time ([link to definition](#))
- Does not use MIT-funded resources, facilities, or personnel unless explicitly authorized
- Has objectives, deliverables, and technical scope that are different from your MIT responsibilities
- Does not overlap with your institutional duties in a manner that creates conflict or interferes with your MIT role

Cogswell Cogs is focused on manufacturing components for Augmented Reality technology, my work is focused on exploring developing new uses for AR and measuring the impact on the brain.

1816 characters remaining

Complete Engagement / Proceed

When you complete *Engagement Details*, click **Complete Engagement** in the upper right and a pop-up window will display confirmation that the Engagement is complete. If Financial Details are not required based on your answers to the Relationship questions, you will be prompted to **Create** or **Revise** your **OPA Disclosure**. If the *Financial Details* is required, click the **Proceed** button.

Engagement Completed Successfully ✕

ⓘ Engagement completed successfully! Would you like to add another engagement?

Create Another
No

Create Disclosures ✕

ⓘ Your engagement(s) have been identified as having foreign non-opa relationship. You are required to:

- Revise the OPA Disclosure

Cancel
Revise OPA

Financial Details

Financial Details tabbed questionnaire displays if you replied **Yes** to *Are you compensated or do you have other financial interests (direct or indirect) related to this engagement?* This is where you will define the income, equity, or other interest from the entity to yourself, your spouse, and dependent children.

A note at the top of the screen instructs you to **Select only what applies to your engagement**. You are not required to select a No radio button for an item that does not apply.

- In the **Stock, Equity & Options** section, select a **Yes** or **No** radio button if the described is applicable for **Self**, **Spouse**, or **Dependents**. In the **Comments** field enter explanatory details that may assist compliance review. Note, there is a **Clear** button to remove radio button selections if needed.

Toyota International
 Ownership Type: Unknown | Business Type: -- | Entity Type: --
 Incomplete | Version 1 (Active)

Close | Previous | Complete Engagement

Engagement Details | **Financial Details** | Last saved at 11:52:30 PM

* Select only what applies to your engagement.

	Self	Spouse	Dependent	Comments
Stock, Equity & Options				
Any Equity Interest in a non-publicly traded company (e.g., stock, stock option, or other ownership interest)	<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="text"/> <input type="button" value="Clear"/>
Stock, stock option, or other ownership interests in a publicly traded company valued at >\$100K (Estimated)	<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="text"/> <input type="button" value="Clear"/>

- The **Income From** section defines types of income received by your **Self**, **Spouse**, and **Dependents**. Select your answer from the radio button options: **"Uncompensated"**, **"\$1 - 4,999"** and **"> \$5,000"**.

	Self	Spouse	Dependent	Comments
Income From:				
Royalty Income from intellectual property, including copyrights (excluding any received from MIT)	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="text"/>
Member of a Board of Directors or Science Advisory Board	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input checked="" type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	Advisory Board Membe
Consulting	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="text"/>
Service as an Employee	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999	<input type="text"/>

← Previous | Proceed →

Based on your responses, you may be prompted for additional details such as the combined **total amount of compensation**.

Add Total Compensated Income [Close]

i You have selected "\$1 - \$4,999" for one or more income sources. Please enter the total combined amount for all these selections:

* Please enter total amount:

\$

[Cancel] [Confirm]

Complete Engagement

1. Click **Complete Engagement** in the upper or bottom right of the screen.

Consulting and/or Member of a Board of Directors or Scientific Advisory Board	<input checked="" type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="text"/>	[Clear]
Service as an Employee	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="radio"/> Uncompensated <input type="radio"/> \$1 to \$4999 <input type="radio"/> \$5000 or more	<input type="text"/>	[Clear]

[← Previous] [✓ Complete Engagement]

Validation will run. If required fields were missed, a pop-up will alert you.

Engagement Details | Financial Details | Last saved at 06:16:24 PM [History]

i Please complete all engagement details

* Have you reviewed this engagement with your DLC head or supervisor? **i**

Yes, I have provided and discussed the details of this engagement (Completed Consulting Questionnaire, Via email, etc.)

No

I can't recall

* What is the business focus of this entity? **i**

Audio/Visual wearable technology

i Please provide the business focus of this entity

Validation (1)

- i** Error: Please complete all engagement details
- i** Error: Please provide the business focus of this entity

2. Once completed, a pop-up will appear. Click **Create Another** to create another Engagement or **No** to exit.

Engagement Completed Successfully [Close]

i Engagement completed successfully! Would you like to add another engagement?

[Create Another] [No]

3. Based on the type of Engagement created, you will receive a pop-up window informing you that you need to create/modify an OPA and/or FCOI Disclosure.

