MyCOI-OPA+

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 and country 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.

Engagements: view, modify existing Engagements.
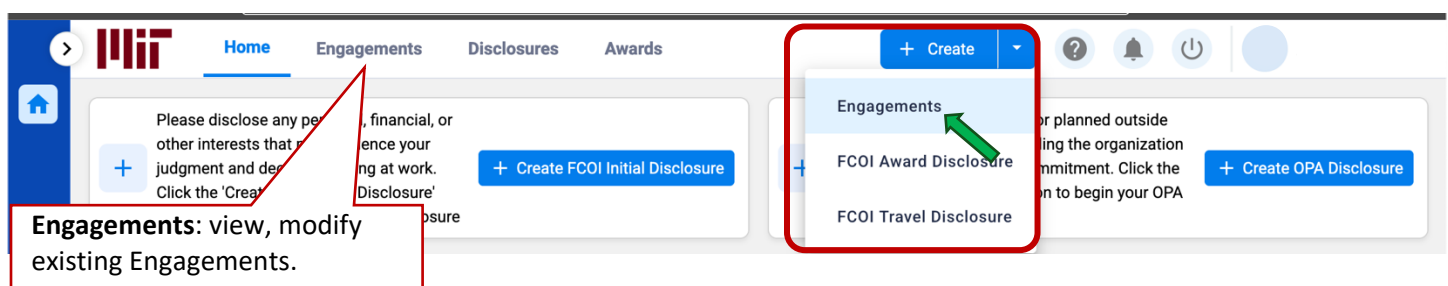
Search: Existing Entity Found

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.

Begin by entering the official name of the business or organization

Existing Entity Found

3. The elastic search will display potential matches in a drop-down menu. **Select the matching entity**.

Click to select organization/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.

International flag indicates a multinational entity.

Entity Not Found – Add New Entity

5. If the Entity Name elastic search does not retrieve the correct organization in the list of potential matches the window's lower border will state, *Click here to add "Entity Name" as a new Entity*. **Click the Entity Name link**.

Relationship Details

* Entity Name

Cogswell Cogs

No results

Select your Entity from the dropdown. If no match is found, Click here to add "Cogswell Cogs" as a new Entity.

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 elastic search results in the dropdown menu.   Enter additional information, if possible, then click the **Save** button.

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 Details

7. The entity will display at the top of the screen. Answer the questions, including three Yes / No questions marked required with a red asterisk *****. Then click the **Proceed** button.

> **Yes** response will require completion of Financial Details

> **Yes** response will include the Engagement in OPA disclosure

8. 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 response) display below. For contextual help on any question, click the ⓘ icon. Your responses are autosaved Last saved at 10:42 AM ☁

9. If your **engagement with the entity involves Students or Staff/Subordinates**, click the **+ Add Row** button and enter the person's **Name**, **Type of work performed**, and your **Relationship with Student or Staff/Subordinate**.

10. 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.

11. When you complete Engagement Details, click **Complete Engagement** in the upper right and a confirmation pop-up window will display. If the *Financial Details* tab is displayed, click **Proceed** in the bottom right (see the next section for details).

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 Comments box is available for each item, if a brief explanatory comment is needed.

12. In this section, select a **Yes** or **No** radio button if the described Stock, Equity & Options is applicable for **Self**, **Spouse**, or **Dependents**. In the **Comments** field enter explanatory details that may assist compliance review.

	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)	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	
Stock, stock option, or other ownership interests in a publicly traded company valued at >$100K (Estimated US dollar value at time of disclosure)	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	

13. 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**".

Complete Engagement

14. Click the **Complete Engagement** button in the upper right portion of the screen. During Validation you may receive a pop-up window requesting details on specified funding or you will be directed to incomplete questions.

15. If validation is complete, a pop-up window will confirm **Engagement Completed Successfully**. Click **Yes** to create another Engagement or **No** to exit.