

## 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.

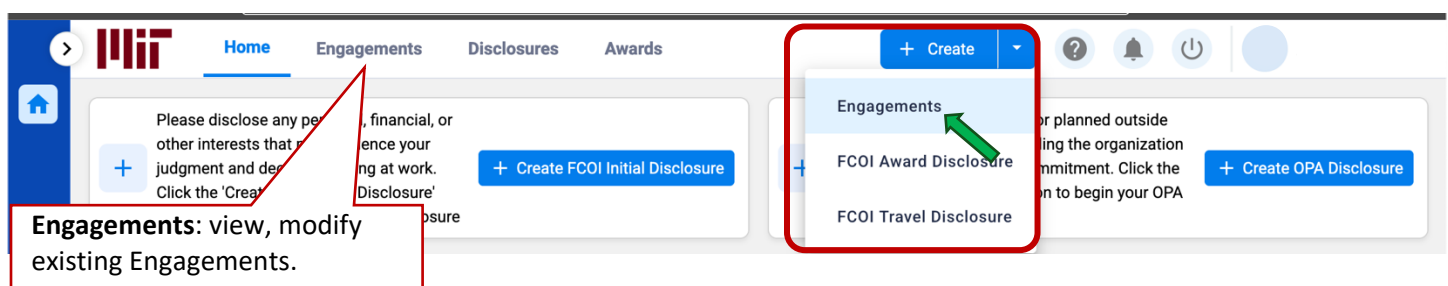
### ⚠ Important Reminder:

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.



### 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.

**Relationship Details**

**Entity Name**

Type here to search / add an Entity

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.

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

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

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?

☐ Yes

☐ No

Do you spend time on this engagement outside your MIT Institutional Responsibilities?

☐ Yes

☐ No

## Existing Entity Found

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

**Relationship Details**

**Entity Name**

orb

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

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

- 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.

**Entity Details**

**Orbital Materials Ltd.** International

Ownership Type: Unknown | Business Type: -- | Entity Type: --

**Address**

Oak House, Tanshire Park, Shackleford Road

City	State/Province/Region	ZIP/Postal Code	Country
Elstead	--	--	United Kingdom

DUNS Number	UEI Number	CAGE Number	Website
229493062	--	--	--

Cancel Confirm

## Entity Not Found – Add New Entity

- 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.

- 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.

**Add new Entity**

\* **Entity Name**

Cogswell Cogs

**Entity Type**

--Select--

**Ownership Type**

Privately Held

\* **Country**

Korea, Republic of

**Primary Address**

**Address Line 1**

**Address Line 2**

**City**

**State/Province/Region**

**ZIP/Postal Code**

**Phone**

**Email Address**

**Website**

**DUNS Number**

**UEI Number**

**CAGE Number**

Cancel Save

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.

**Cogswell Cogs**

Start Date of engagement: 09/01/2020  
End Date of engagement: --  
Does this entity sponsor your MIT research?: No

Address: --  
City: --  
State/Province/Region: --  
ZIP/Postal Code: --  
Country: Korea, Republic of  
DUNS Number: --  
UEI Number: --  
CAGE Number: --  
Website: --

Start Date of engagement (if known): 09/01/2020  
End Date of engagement (if ongoing, leave blank): MM/dd/YYYY

\* 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?  
☐ Yes  
☒ No

\* Do you spend time on this engagement outside your MIT Institutional Responsibilities?  
☒ Yes  
☐ No

**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 **i** icon. Your responses are autosaved **Last saved at 10:42 AM**

**Cogswell Cogs**  
Ownership Type: Privately Held | Business Type: -- | Entity Type: --  
Incomplete | Version 1 (Active) | Close | Complete Engagement | History

**Engagement Details**

Are you compensated or do you have other financial interests (direct or indirect) related to this engagement?  
☐ Yes  
☒ No

Do you spend time on this engagement outside your MIT Institutional Responsibilities?  
☒ Yes  
☐ No

\* Have you reviewed this engagement with your DLC head or supervisor?  
☐ 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?  
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.

**Engagement Completed Successfully**  
Engagement completed successfully! Would you like to add another engagement?

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**.

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

☒ Yes

☐ No

\* Provide details for each staff/subordinate

Click + Add Row if you have another person to report

+ Add Row

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

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.

\* 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 Cogswell 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

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
<b>Stock, Equity &amp; Options</b>				
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"/>
Stock, stock option, or other ownership interests in a publicly traded company valued at >\$100K (Estimated US dollar value at time of disclosure)	<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"/>

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**".

	Self	Spouse	Dependent	Comments
<b>Income From:</b>				
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"/>

## 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.

Add Total Compensated Income

**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:

\$

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

Engagement Completed Successfully

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