MyCOI-OPA+

Overview Dashboard

The **Overview Dashboard** in MyCOI-OPA+ allows authorized users to view the status and progress of FCOI, OPA, and Travel disclosures in their assigned areas.

Overview Categories

The Overview tiles provide a cumulative tally of statuses of the three MyCOI-OPA+ Review categories.

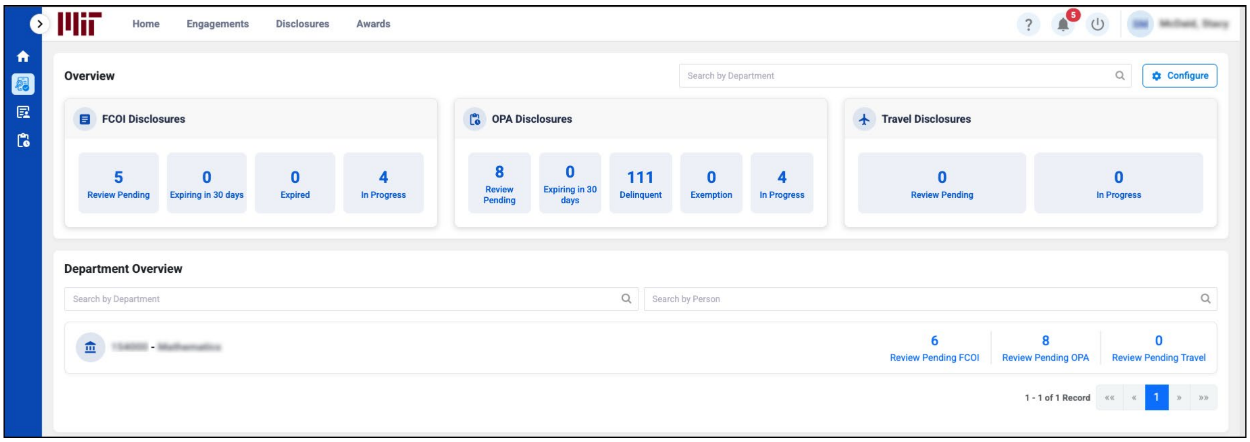


Figure 1 - Overview Dashboard

The categories are:

FCOI Disclosures

- **Review Pending** - Disclosures that have been submitted by a Reporter but are still under review by COI team
- **Expiring in 30 Days** - Disclosure that has had no updates within the period of 11 calendar months and will require a Revision to make it current
- **Expired** - Disclosures that have had no update in 12+ months
- **In Progress** - Disclosures currently undergoing creation or revision by a Reporter

OPA Disclosures

- **Review Pending** - Disclosures that have been submitted by a Reporter but are still under review by COI team and/or Department OPA Reviewer
- **Expiring in 30 Days** - Disclosure that has had no updates within the period of 11 calendar months and will require a Revision to make it current
- **Delinquent** - Disclosures that are overdue for submission. They may be In Progress or not created yet.
- **Exemption** - Department-approved waiving of a delinquent disclosure due to special circumstances
- **In Progress** - Disclosures currently undergoing creation or revision by a Reporter

Travel Disclosures

- **Review Pending** - Disclosures that have been submitted by a Reporter but are still under review by COI team
- **In Progress** - Disclosures currently undergoing creation or revision by a Reporter

Accessing the Overview Dashboard

1. Open the MyCOI-OPA+ application.
2. If desired, expand the left-side navigation bar by clicking on the expand arrow.

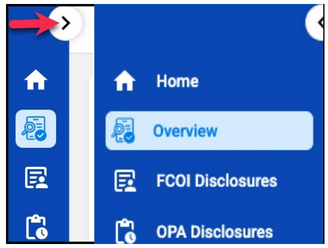


Figure 2 - Accessing the Overview Dashboard

3. Click on the  (Overview) icon.
4. A list of one or more departments (depending upon your Reviewer role) will show.

Department Overview

All that will be visible to the Reviewer are the departments and disclosures within their role-assigned DLCIs. Those with roles for more than one DLCI will have a listing of all their departments. If the list of departments under your purview is extensive, it is possible to manually search in the **Department Overview** field to get directly to the desired department.

1. As it is an elastic search, start typing and the department name will appear.
2. Select the department name. Please note that if searching for a department outside the one you have roles for, it will not appear as a search result.

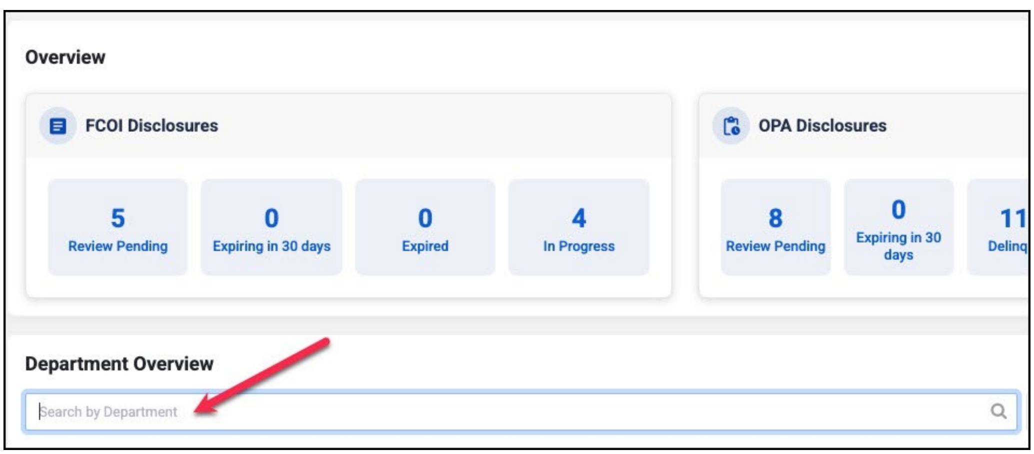


Figure 3 - Department Manual Search

Figure 4 - Department Tile

The listed department(s) will have summary data to the right of the department tile. There you will see **Review Pending FCOI**, **Review Pending OPA**, and **Review Pending Travel.** Each are hyperlinks that will bring you directly to the category you click on, and the numbers denote the quantity in each category.

Clicking on the department name itself will open a window that shows the breakdown of disclosure statuses.

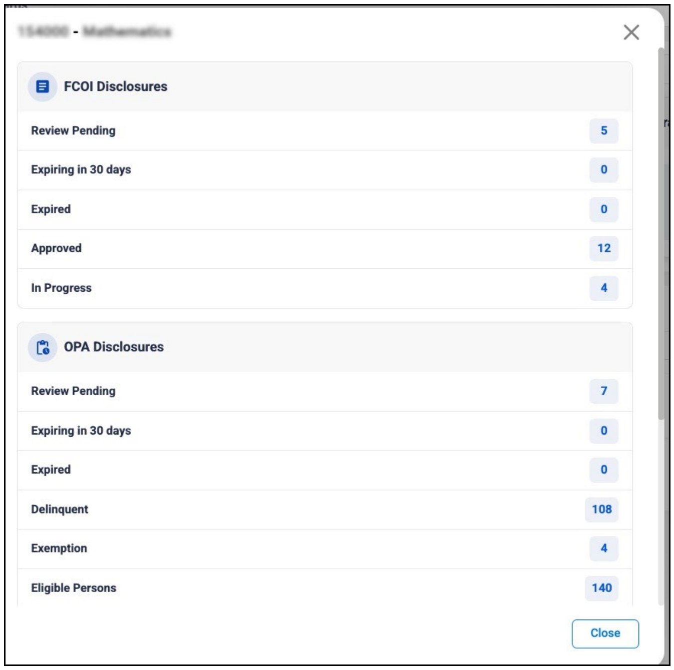


Figure 5 - Disclosure Statuses Window

For the following example, the **Review Pending OPA** hyperlink was chosen, and the result is the list of eight OPA Disclosures that have been submitted by a Reporter, awaiting departmental review (screenshot truncated in the interest of space):

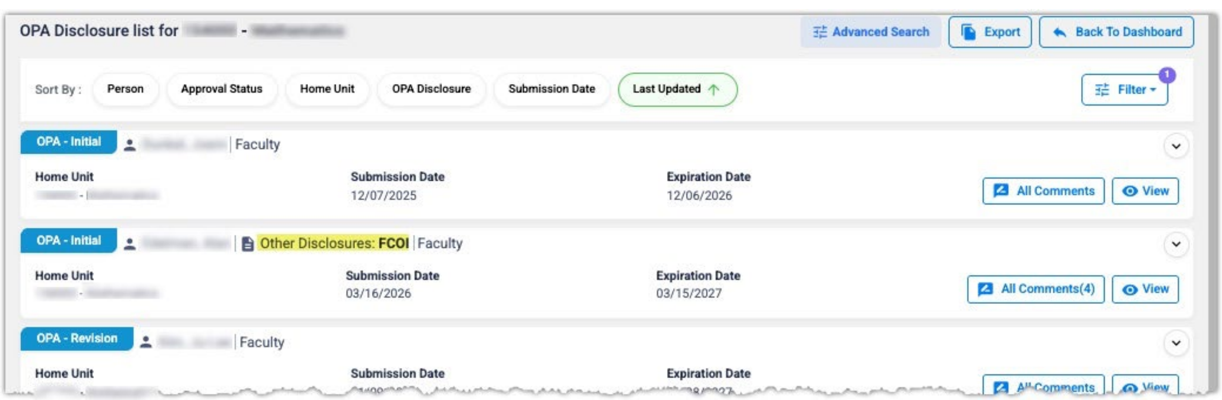


Figure 6 - List of OPA Disclosures

Where applicable, there is a notation that the Reporter has **Other Disclosures** in the system as well. In the screenshot above, the second individual in the list also has an active FCOI disclosure (highlighted in yellow for demonstration purposes).

Accessing Individual Disclosures

After clicking on one of the status buttons (Review Pending, Expiring, etc.), accessing both OPA and FCOI disclosures within the Overview Dashboard is the same process as with the OPA and FCOI Reviewer Dashboards.

1. Click on the Overview tile of choice. For this example, the **Review Pending** button in the **OPA Disclosures** tile was chosen:

Figure 7 - OPA Disclosures Tile

2. From the list, which could be either be disclosures that are OPA - Initial (new) or OPA - Revision (updated), you will click on View to open the disclosure.
3. Take whichever action is needed (Review, add Comments, Return, Approve, add Ad Hoc Reviewer, etc.), or simply close the disclosure via the Close button in the upper right of the screen.
4. To return to the list of **OPA Disclosures**, click the Back To Dashboard button in the upper right.
5. This process is the same for all disclosure statuses, and the same for viewing **FCOI** and **Travel Disclosures**.

Delinquent OPA Disclosures

OPA disclosures that are either late in submission or have yet to be submitted are referred to as Delinquent.

Reviewers can see the list of Reporters whose OPA disclosures are overdue.

1. Click on the 4 Delinquent button in the OPA Disclosures tile.
2. You will be presented with the list of **Individuals Who Did Not Submit OPA Reports**

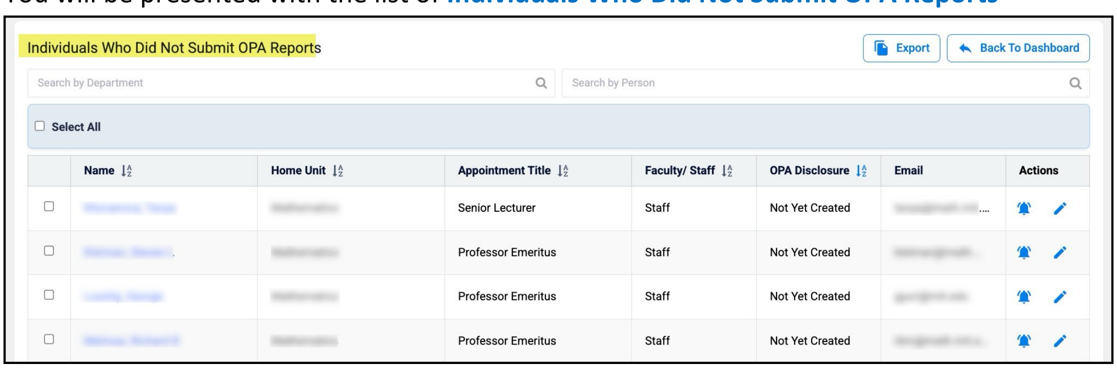


Figure 8 - Delinquent Reporters

3. The list of delinquent Reporters can be exported as an Excel document by clicking the Export button in the upper right of the screen.

Reviewers also have the option of reaching out to the Reporters either individually or as a group to remind to submit their OPA disclosure. The notification process is the same for both scenarios.

1. To notify individually, click the icon to the right of the individual's name in the list.

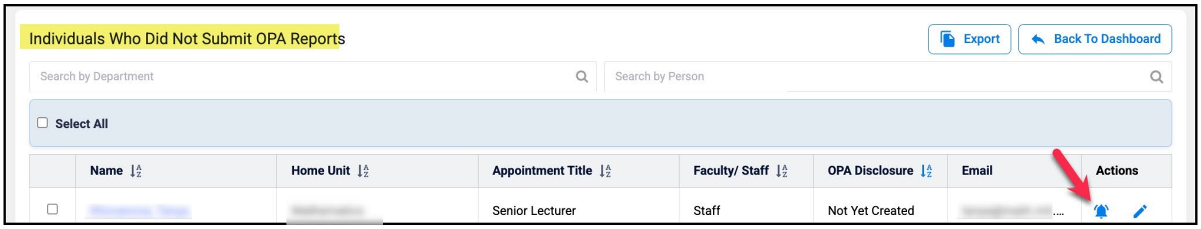


Figure 9 - Individual Notify

2. To notify all individuals in the list, click the checkbox for Select All at the top of the list. There is a limit of 500 individuals who can be notified at one time.

Figure 10 - Multiple Notify

3. A pop-up window will display, and all the selected recipients will be included in the notification. Despite all the individual email addresses being displayed in the window, all will be blind copied (bcc'd). Each recipient will see only their own email address.
4. The text fields are free text fields, so the Reviewer can add any message they choose to the **Subject** and **Message Body** fields. You can also add other recipients if desired at this stage.

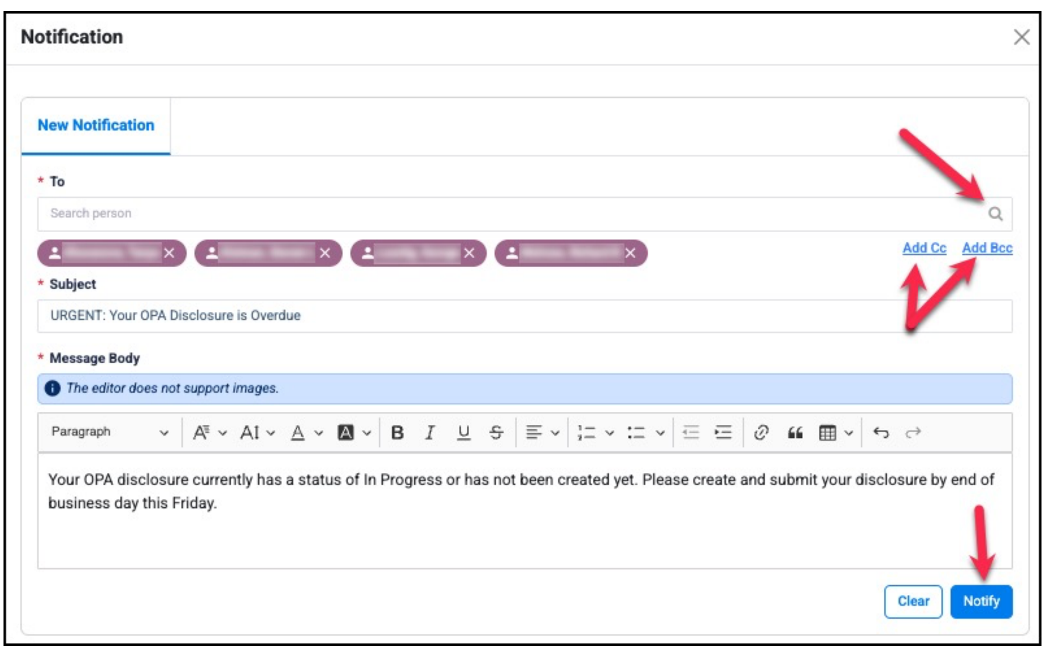


Figure 11 - Notification Window

5. Click the Notify button, and the email will be sent to all the chosen recipients.

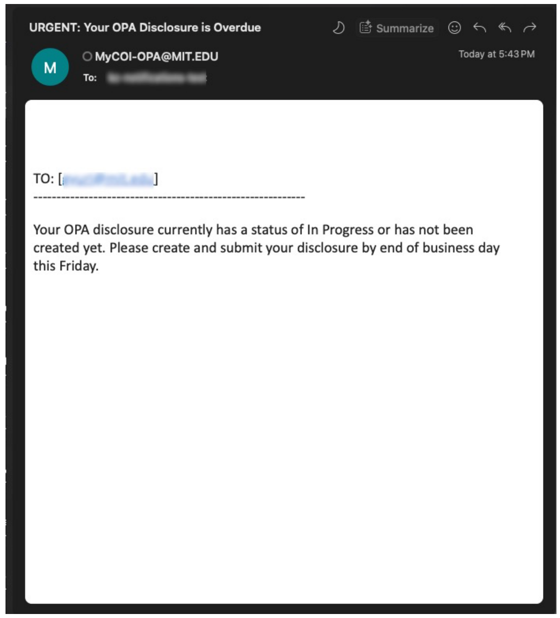


Figure 12 - Reviewer's Reminder Prompt from MyCOI-OPA+

6. If your list of recipients exceeds 500, click to the next page for the next page of recipients and repat the notification process.

Exemptions in OPA Disclosures

There are rare circumstances where a Reporter who would ordinarily be required to submit an OPA disclosure could potentially be granted an exemption.

To assign such an exemption:

1. Navigate to the list of Delinquent disclosures (Individuals Who Did Not Submit OPA Reports). To the far right of the line for the individual is the **Actions** column.

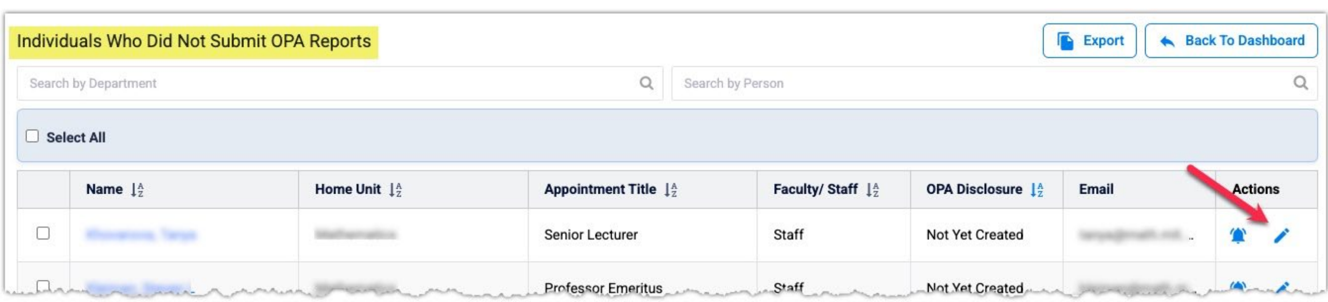


Figure 13 - Granting an Exemption: Delinquent List

2. Click the icon and a pop-up window of the individual will be presented. Fields marked with a red asterisk are mandatory.

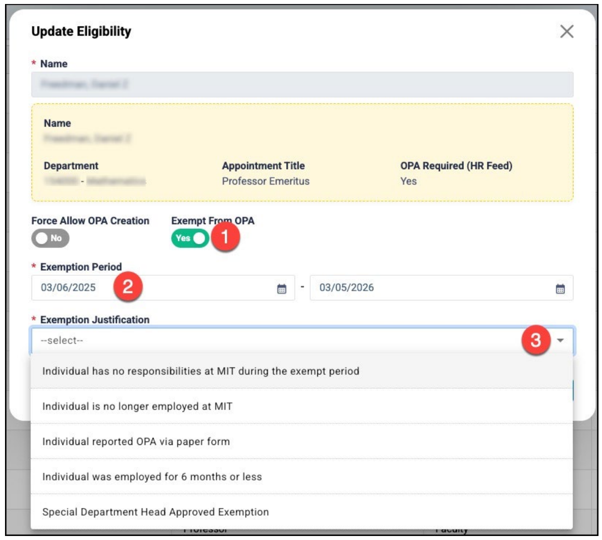
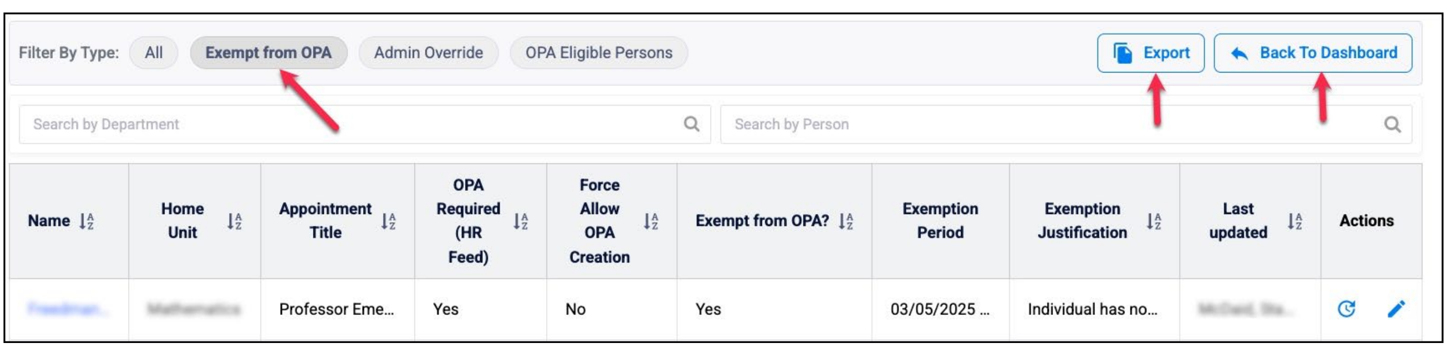


Figure 14 - Update Eligibility Window

3. Click the toggle for **Exempt From OPA.**
4. Enter the start date and end dates in the **Exemption Period** fields.
5. Choose from the **Exemption Justification** drop-down list.
6. Click the Update Eligibility button in the lower right of the window.
7. To return to the dashboard, click Back To Dashboard.
8. The individual will now show in the **Exemption** list, removed from the **Delinquent** list, and be represented in the **OPA Disclosures** tile. Clicking on the button will open the list.



The list is also exportable.