

## OPA Review and Approve

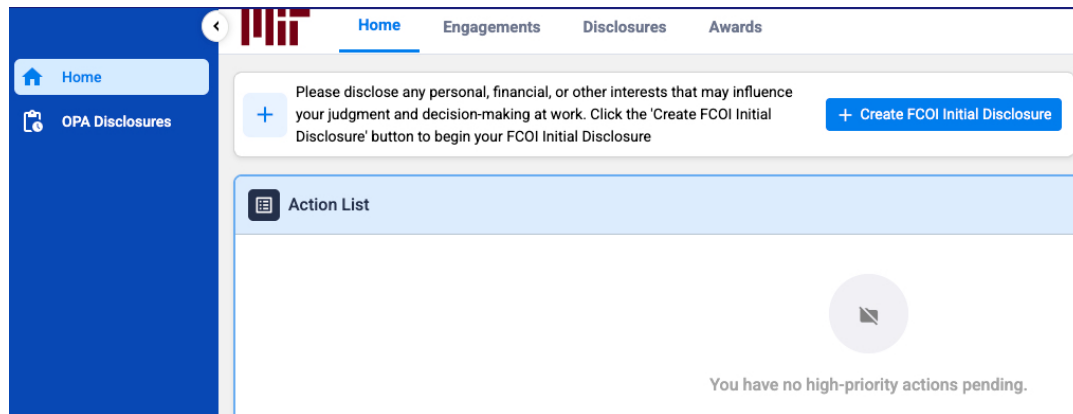
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*If you have additional questions not answered in this guide, please email [ra-help@mit.edu](mailto:ra-help@mit.edu).*

## Overview/Dashboard

1. Access the **MyCOI-OPA+** tool at <https://mycoi-opa.mit.edu>



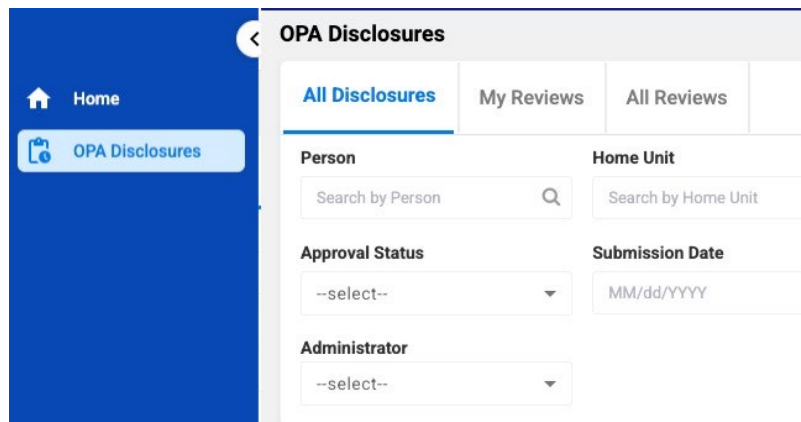
2. Click the **OPA Disclosure Dashboard** button  from the left navigation bar on the home screen. The dashboard is broken up into three tabs:

**All Disclosures** – Click  to see **all** Disclosures

**My Reviews** – Disclosures assigned to you

**All Reviews** – All **In Progress** disclosures within your department or school visible to those with department-level access.

3. By default, the **All Disclosures** tab will show. From this screen, by using the Advanced Search, one can search for an OPA disclosure via several search parameters.



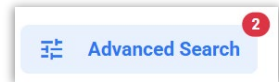
## Advanced Search

1. By default, the **All Disclosures** tab will display with the **Advanced Search** screen already open.
2. Enter data into the field(s) you wish to search on and then click the blue **Search** button in the lower right corner. The more fields included in a search, the narrower the results will be, and some of the fields feature elastic search (which will display options that can be selected).

3. The search results will display all disclosures that match the information you entered.
4. Use the **Sort By** buttons at the top of the list to reorder the results if desired.




5. Once you have run a search, the **Advanced Search** button will display a number; this indicates the number of fields you used for this search. To narrow or broaden the search, click the button to reopen the search fields and edit as desired.

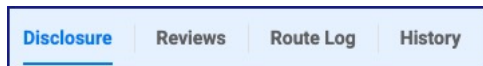


## Viewing Search Results

The search results will display as individual tiles with summary information regarding the type of disclosure, Such as **OPA - Revision** and **OPA - Initial**.

The  **View** button in the lower right corner of a disclosure tile will open the record so that you can review all the information in detail. All OPA engagements associated with the disclosure will show as a list of individual tiles within the Disclosure tile.

The blue bar has tabs that provide quick access to:



**Disclosure** – The Disclosure itself (default view)

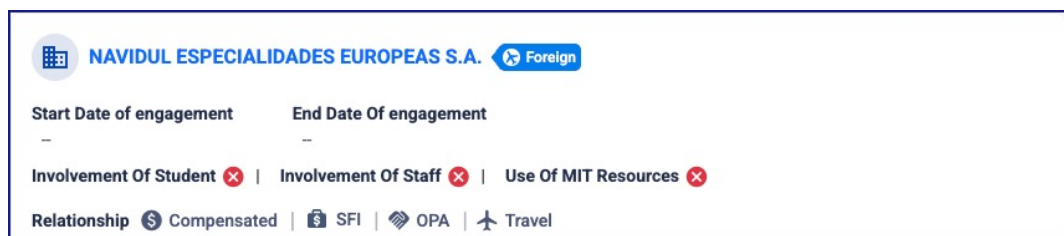
**Reviews** – **Reviews** that have already taken place will be listed here

**Route Log** – The **approval** stops from the disclosure's submission to its final approval



**History** – All Disclosure **activity** from its submission to its final approval

## Engagement Tile Details


Each tile will have summary details of the listed Engagement(s):




- Start and End date of the Engagement


- The  indicates that there is **no involvement** of Students, Staff, or use of MIT Resources. If there were, it would be indicated by .
- The **Relationship** icons indicate which type of relationship the Reporter has with the engagement:

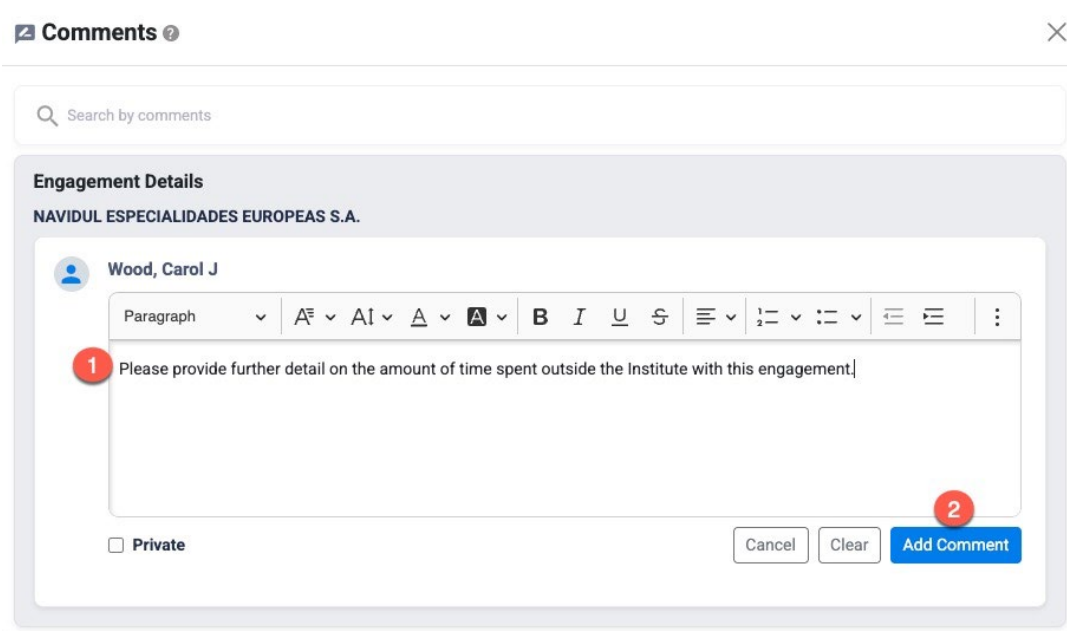
 Compensated |  SFI |  OPA |  Travel

Clicking the  button will open the details for that Engagement. The **Engagement Details** tab will always display. Depending on the questionnaire answers in the Engagement tab, a **Financial Details** tab will display indicating there is an SFI. For example, if the Reporter answers Yes to receiving financial compensation, then the Financial Details tab displays. If it exceeds 5,000, then the SFI flag will display on the Engagement.

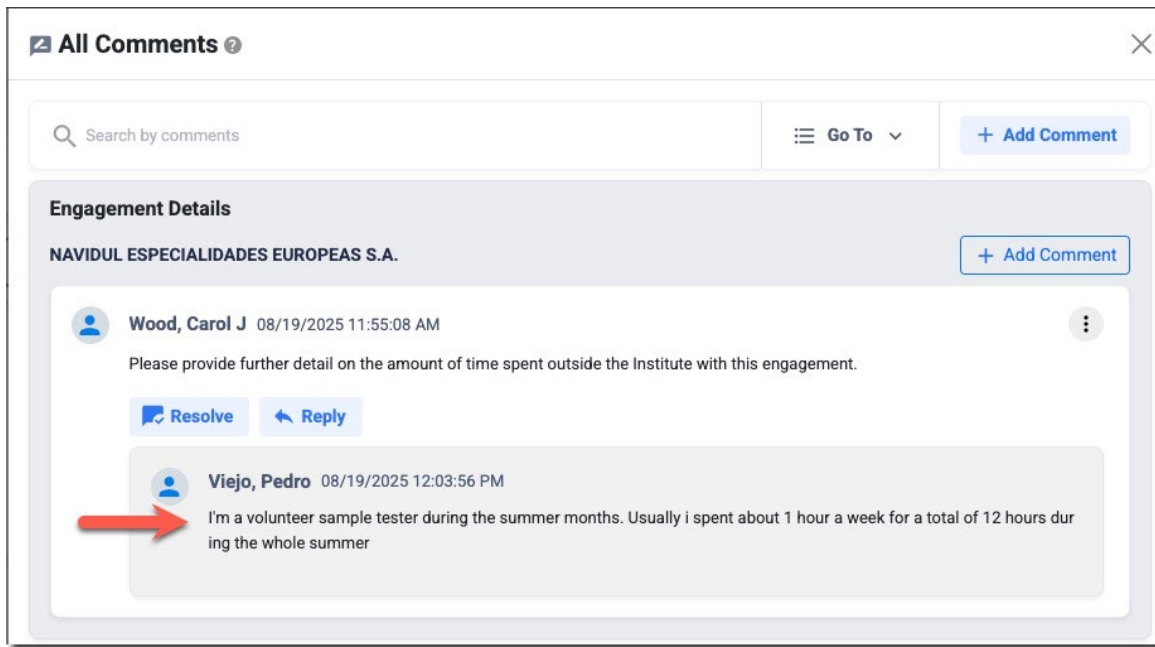
## Comments

A **Reviewer** has the option to send comments in a disclosure to the **Reporter** by clicking the  button in the lower right of each tile.

1. In the pop-up window, add your comment, then click .



2. The **Reporter** can then reply to the **Reviewer** through the system. Replies are in the shaded box:

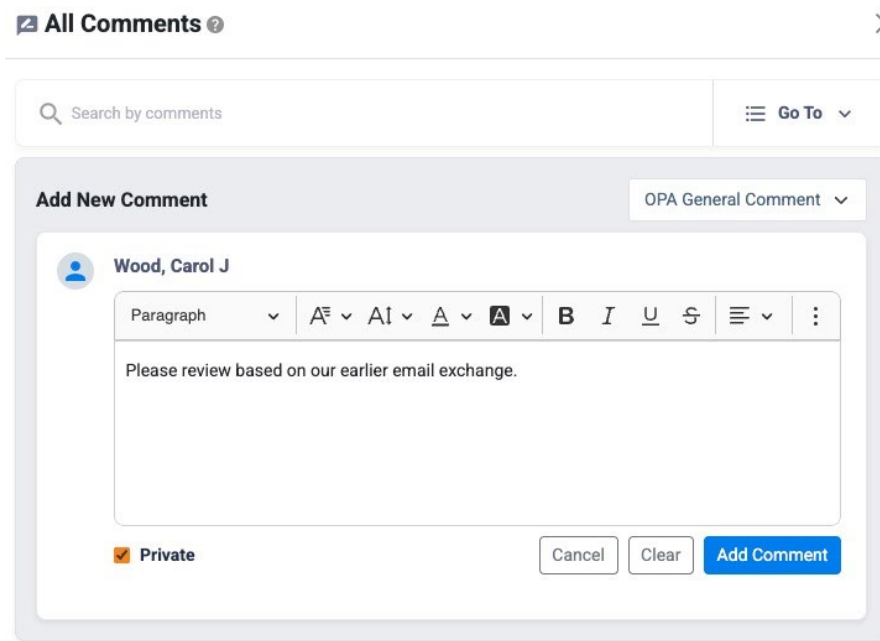


3. Private comments can be sent by the current **Reviewer** by clicking ☒ **Private**:

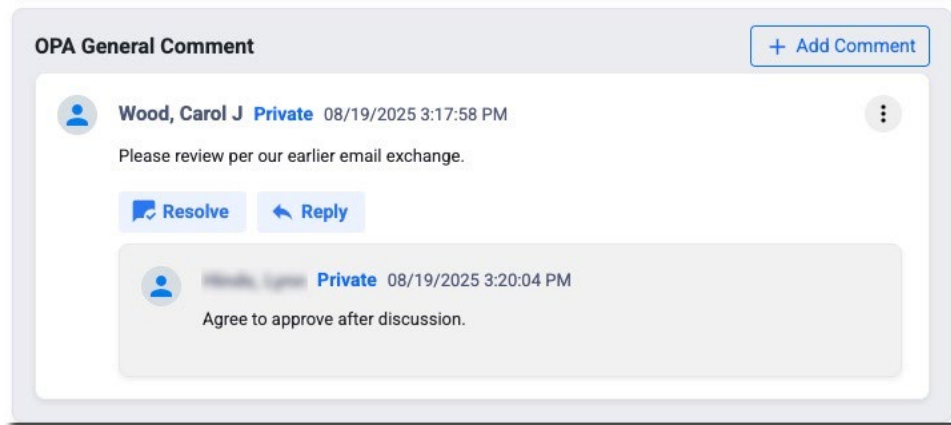


**IMPORTANT: COMMENTS NOT MARKED AS PRIVATE ARE VISIBLE TO THE REPORTER.**

Private comments are otherwise visible to **all Approvers** and **Reviewers**.

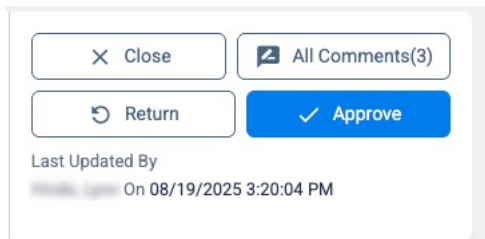


The additional **Reviewer** can also reply. Replies are in the shaded box:



## Action Buttons and Review

In the upper right corner of the screen is the **Action Buttons** area.



In addition to a timestamp indicating when the last action was taken and by whom, this section allows the **Reviewer** to:

**Close** the current view of that disclosure.

View **Comments**, if any (there will be a number indicating how many comments).

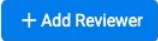
**Return** the disclosure to the **Reporter**.

**Approve** the disclosure.

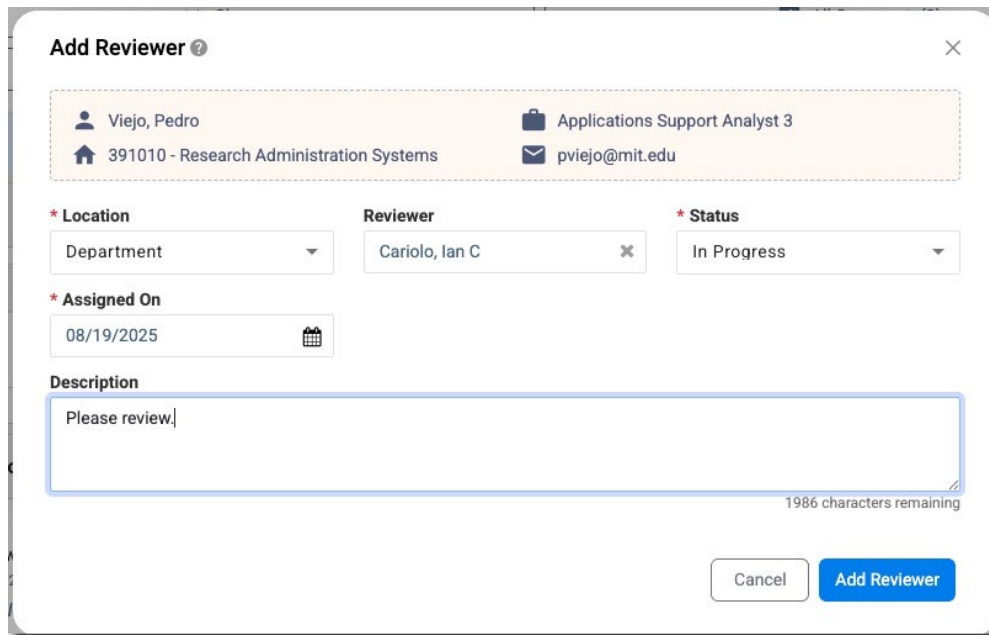
## Adding Additional (Ad Hoc) Reviewers

If the **Reviewer** wishes to add an **ad hoc Reviewer** prior to returning or approving the disclosure, they can be added in the **Reviews** section:

1. Click **Reviews** tab
2. Click **+ Add Reviewer** button

3. Complete the information in the pop-up window, then click . Fields marked with an asterisk are mandatory.

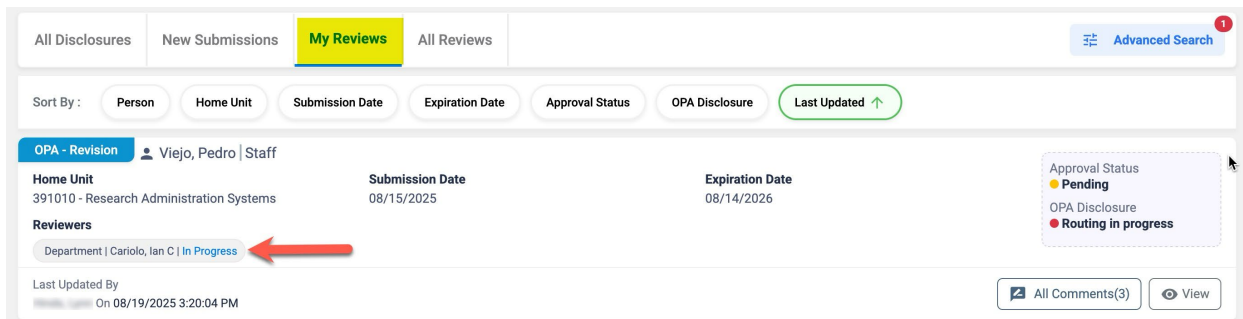
- a. **Location** and **Status** are drop-down menus.
- b. **Reviewer** field is an elastic search (simply start typing name)
- c. **Description** is a free-text field.



The 'Add Reviewer' pop-up window contains the following fields and information:

- Reviewer Information:**
  - Name: Viejo, Pedro
  - Department: 391010 - Research Administration Systems
  - Role: Applications Support Analyst 3
  - Email: pviejo@mit.edu
- \* Location:** Department (dropdown menu)
- Reviewer:** Cariolo, Ian C (search field)
- \* Status:** In Progress (dropdown menu)
- \* Assigned On:** 08/19/2025 (calendar icon)
- Description:** Please review. (text area with 1986 characters remaining)
- Buttons:** Cancel, Add Reviewer

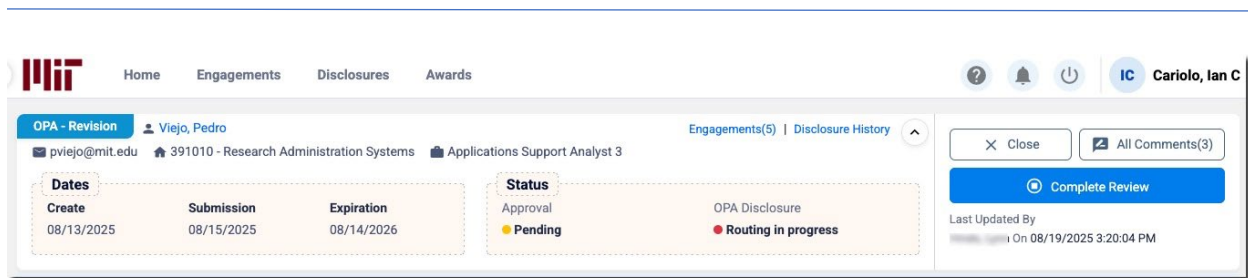
The **Ad Hoc Reviewer** will then see the assigned disclosure in their **My Reviews** tab:



The 'My Reviews' tab interface shows the following details for a review:

- Navigation:** All Disclosures, New Submissions, **My Reviews**, All Reviews
- Sort By:** Person, Home Unit, Submission Date, Expiration Date, Approval Status, OPA Disclosure, Last Updated (selected)
- OPA - Revision:** Viejo, Pedro | Staff
- Home Unit:** 391010 - Research Administration Systems
- Submission Date:** 08/15/2025
- Expiration Date:** 08/14/2026
- Reviewers:** Department | Cariolo, Ian C | **In Progress** (highlighted with a red arrow)
- Last Updated By:** On 08/19/2025 3:20:04 PM
- Approval Status:** Pending (yellow dot)
- OPA Disclosure:** Routing in progress (red dot)
- Buttons:** All Comments(3), View

The **Ad Hoc Reviewer** will only be able to *Complete review*, **not** approve or take any other action. They complete their review by clicking .






## Approval/Return

From the Action Buttons section, one can either:

**Approve** the disclosure.

**Return** it back to the **Reporter**.

Clicking  will cause a pop-up window to display. The mandatory *Reason for Return* field is free text. One also has the option to add an attachment if desired. Click  to send it back to the **Reporter**.

Depending on the stage of approval routing, clicking  will either finalize the approval of the disclosure, or it will move on to the next approval stop.



