

OPA Review and Approve

Contents

- OPA Review and Approve 1
 - Contents 1
 - OPA Dashboard 2
 - Advanced Search 2
 - Viewing Search Results 3
 - Engagement Tile Details 4
 - Adding Additional (Ad Hoc) Reviewers 5
 - Ad Hoc Reviewer’s View 7
 - Comments 8
 - Comments View: Who can see which comments? 10
 - Comments Notifications 11
 - Action Buttons and Review 12
 - Approval/Return 13
 - Routing 14

If you have additional questions not answered in this guide, please email ra-help@mit.edu.

OPA Dashboard

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

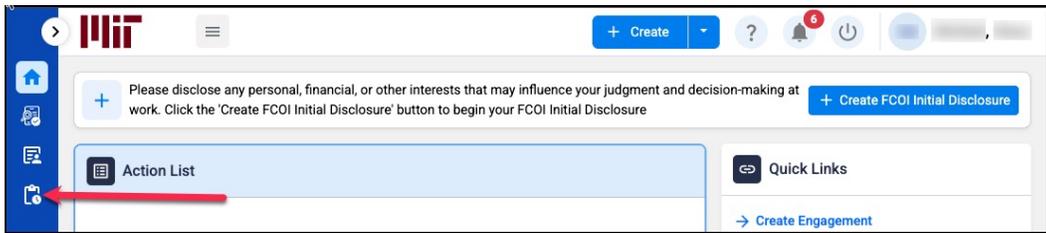


Figure 1 - OPA Dashboard

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 – Disclosures in various states that are not finalized 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, you can search for an OPA disclosure via several search parameters.

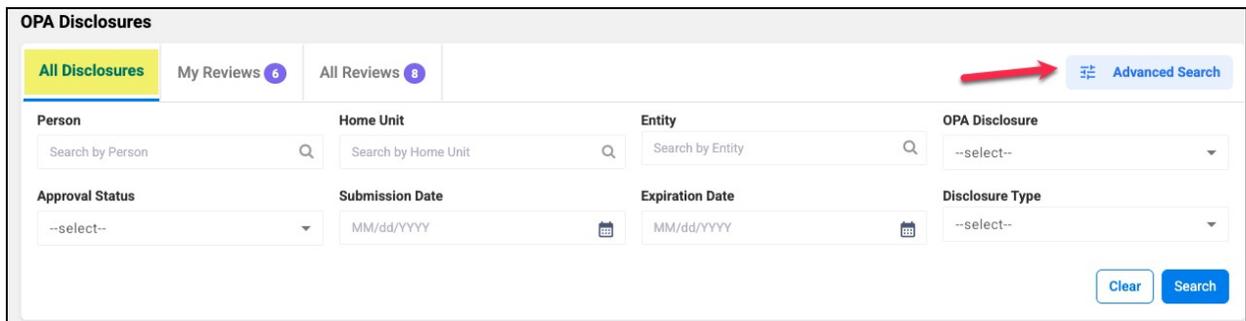


Figure 2 - Disclosures Tabs

Advanced Search

1. Click the  button.
2. Enter data into the field(s) you wish to search on and then click the blue  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.

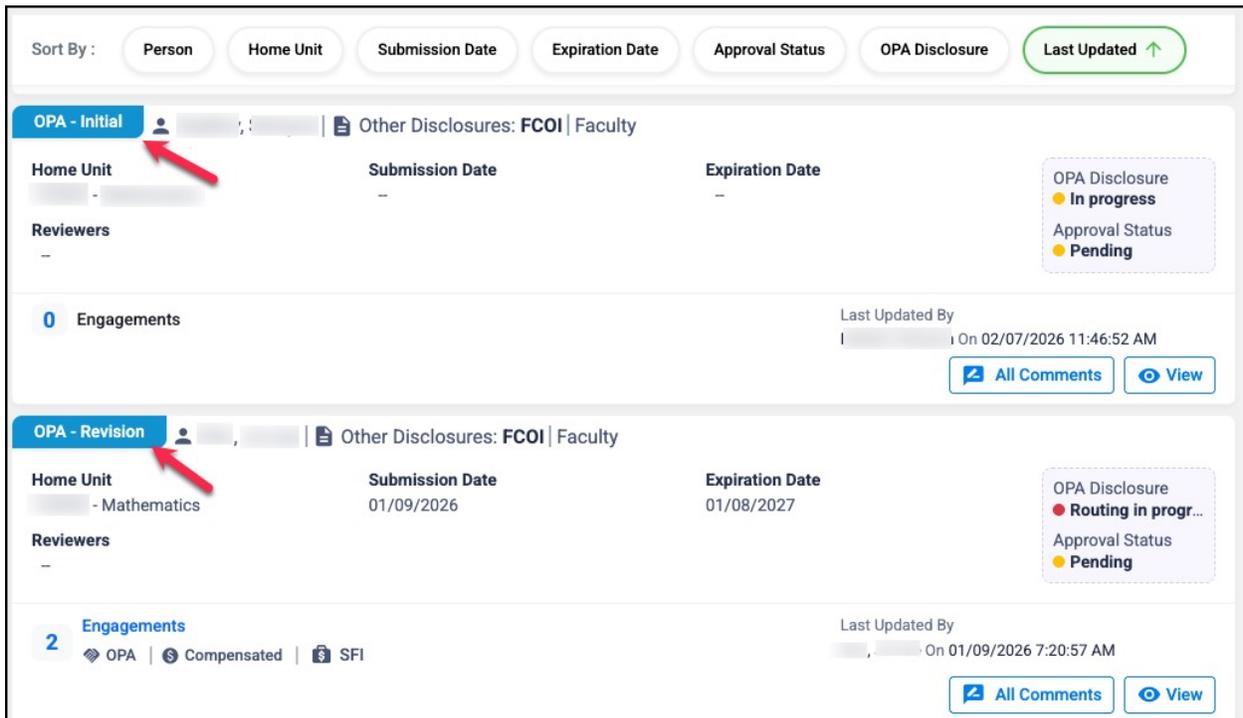
Sort By: Person Home Unit Submission Date Expiration Date Approval Status OPA Disclosure Last Updated ↑

- 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.

 **Advanced Search**

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.



Sort By: Person Home Unit Submission Date Expiration Date Approval Status OPA Disclosure Last Updated ↑

OPA - Initial [Person Icon] [Home Unit Icon] | Other Disclosures: **FCOI** | Faculty

Home Unit: [Redacted] Submission Date: -- Expiration Date: --

Reviewers: --

Engagements: 0

Last Updated By: [Redacted] On 02/07/2026 11:46:52 AM

[All Comments](#) [View](#)

OPA - Revision [Person Icon] [Home Unit Icon] | Other Disclosures: **FCOI** | Faculty

Home Unit: [Redacted] - Mathematics Submission Date: 01/09/2026 Expiration Date: 01/08/2027

Reviewers: --

Engagements: 2

OPA | Compensated | SFI

Last Updated By: [Redacted] On 01/09/2026 7:20:57 AM

[All Comments](#) [View](#)

Figure 3 - Search Results

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 screenshot shows a user interface with a blue navigation bar at the top containing tabs for 'Disclosure', 'Reviews', 'Route Log', and 'History'. Below this, there are two main sections. The first section, 'Appointment Details', contains a table with the following information:

Job Title Professor	Admin Employee Type Faculty	Admin Position Title Professor
HR Org Unit -	Admin Org Unit -	Sabbatical / Leave -

The second section, 'Engagement Details', is highlighted with a yellow background and a red arrow pointing to it. It features a calendar icon and the text 'Engagement Details'. Below this, it displays:

- Start date of engagement**: -
- End date of engagement**: 01/07/2026
- Involvement Of Student** (with a red 'x' icon)
- Involvement Of Staff** (with a red 'x' icon)
- Use Of MIT Resources** (with a red 'x' icon)
- Relationship**: Compensated (with a dollar sign icon), SFI (with a document icon), OPA (with a diamond icon)

At the bottom right of the Engagement Details section, there are two buttons: 'View' and 'Comments'.

Once a disclosure has been selected, the blue bar has tabs that provide quick access to:

The screenshot shows a blue navigation bar with four tabs: 'Disclosure', 'Reviews', 'Route Log', and 'History'. The 'Disclosure' tab is currently selected and highlighted with a blue underline.

NOTE: If the disclosure is still **In Progress**, **Reviews** and **Route Log** will not be visible

Disclosure – The Disclosure itself (default view)

Reviews – Ad Hoc **review requests** and their statuses will be listed here

Route Log – The disclosure’s **approval** stops

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

Engagement Tile Details

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

The screenshot shows an engagement tile for 'Apple Inc.' with the following details:

- Start date of engagement**: 07/28/2025
- End date of engagement**: -
- Involvement Of Student** (with a red 'x' icon)
- Involvement Of Staff** (with a green checkmark icon)
- Use Of MIT Resources** (with a red 'x' icon)
- Relationship**: Compensated (with a dollar sign icon), SFI (with a document icon), OPA (with a diamond icon), Travel (with an airplane icon)

At the bottom right of the tile, there are two buttons: 'View' and 'Comments'.

- 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.

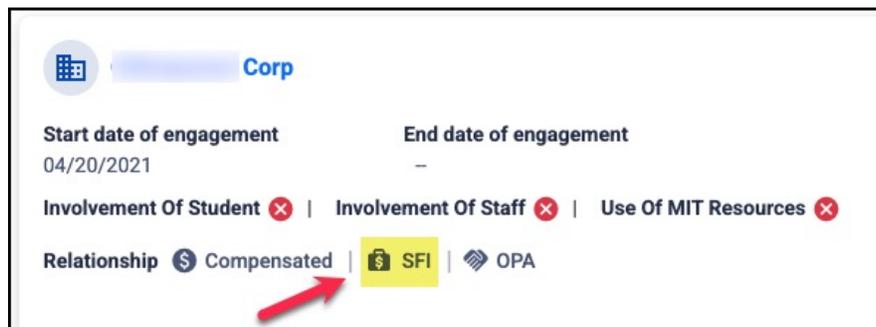


Figure 4 - SFI Flag

Adding Additional (Ad Hoc) Reviewers

If the **Reviewer** wishes to include 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  button
3. Fields marked with an asterisk are auto populated but editable.
 - 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.
4. Complete the information in the pop-up window, then click .

Figure 5 - Adding Ad Hoc Reviewer

The **Ad Hoc Reviewer** will receive an email notification that they have been added to the disclosure review:

Dear **[Name, Name]**,

OPA Administrator **[Name, Name]** assigned you to provide an ad hoc review for the OPA disclosure submitted by **[Name, Name]** on **03-16-2026**.

Department: **[Department]** – **[Department]**

Please follow [this link](#) to review this disclosure.

Thank you.

Note: This is a system-generated email. Please do not reply to this email.

Figure 6 - Ad Hoc Notification

This new review request will be visible in the **Reviews** section of the disclosure.

Location	Group	Reviewers	Description	Assigned On	Review End Date	Days at Location	Status	Actions
-- No Location assigned --	-- No Group assigned --	Cariolo, Ian C	Please review.	03/01/2026		13	Assigned	+ - 📧 ⋮

Review History

- Review assigned to **Cariolo, Ian C** with status **Assigned** by Administrator : **[Name]** on 03/13/2026 3:00:02 PM
Please review.

Figure 7 - Ad Hoc Reviewers

Ad Hoc Reviewer's View

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

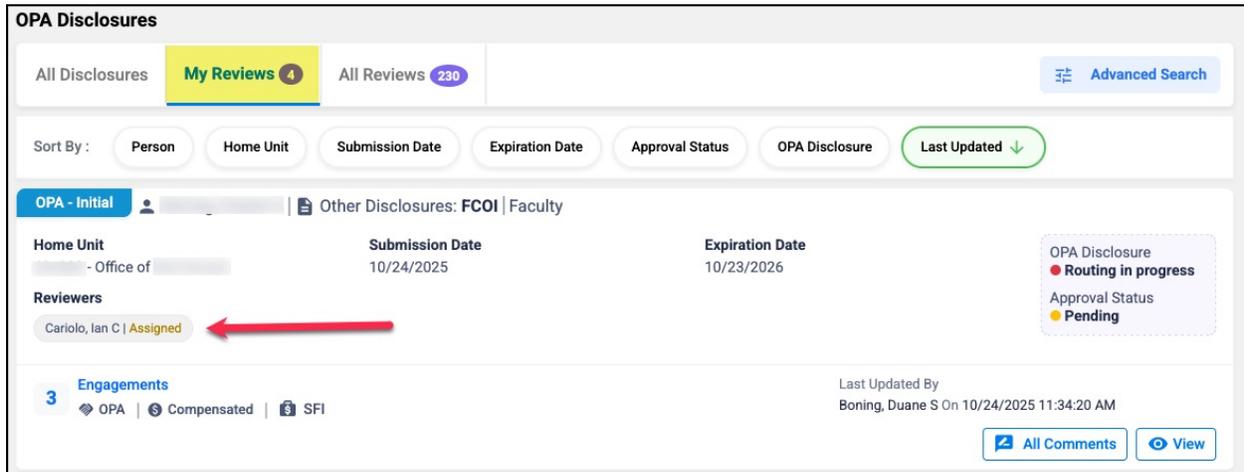
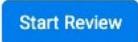


Figure 8 - Ad Hoc Reviewer View

- Click on the  button on the lower right
- Click  and add Description in the free-text field if desired
- Click 

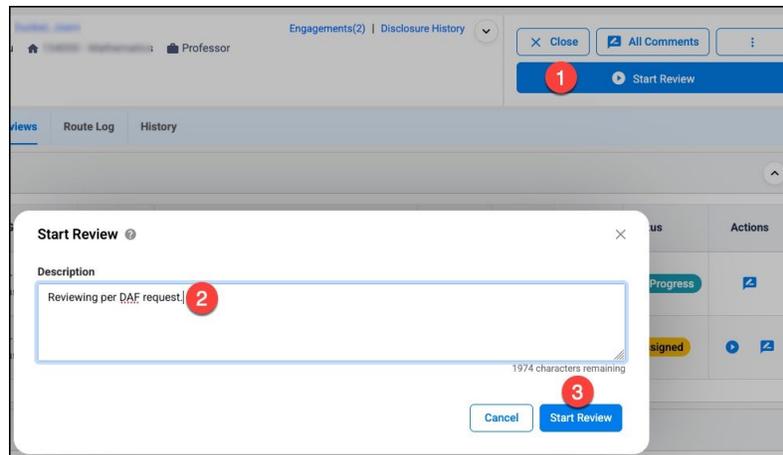


Figure 9 - Start Ad Hoc Review

- The **Ad Hoc Reviewer** will see all the same disclosure elements as **Reviewer/Approvers**.

- However, they will **only** be able to **Complete Review**, **not** approve or take any other action. They complete their review by clicking .

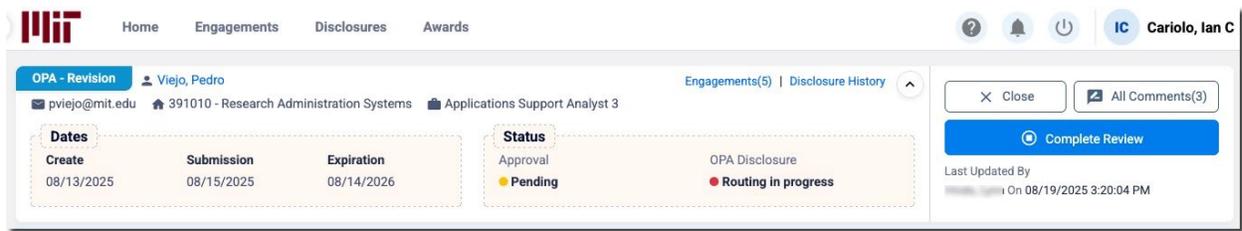


Figure 10 - Complete Review

NOTE: An OPA disclosure cannot be approved until the Ad Hoc Reviewer has completed their review. If an approval is attempted, a validation error will occur.

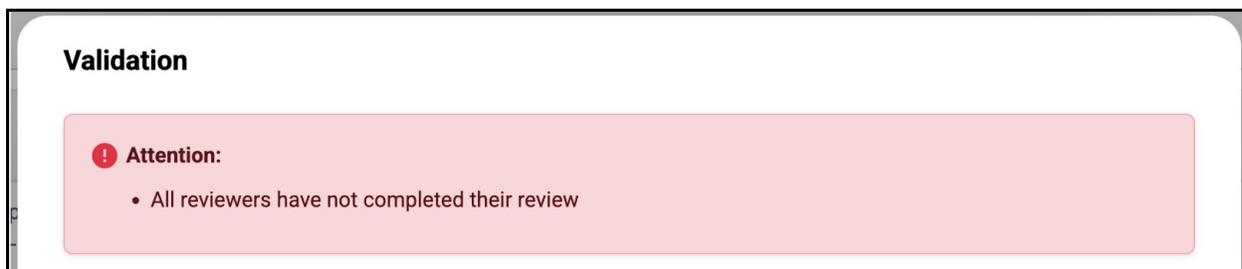


Figure 11 - Review Incomplete Validation

Comments

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

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

A **Reviewer** has the option to send comments in a disclosure to the **Reporter and/or Reviewer(s)** by clicking the  button in the lower right of each tile.

To mark a comment as **Private**, click the checkbox **Private**.

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

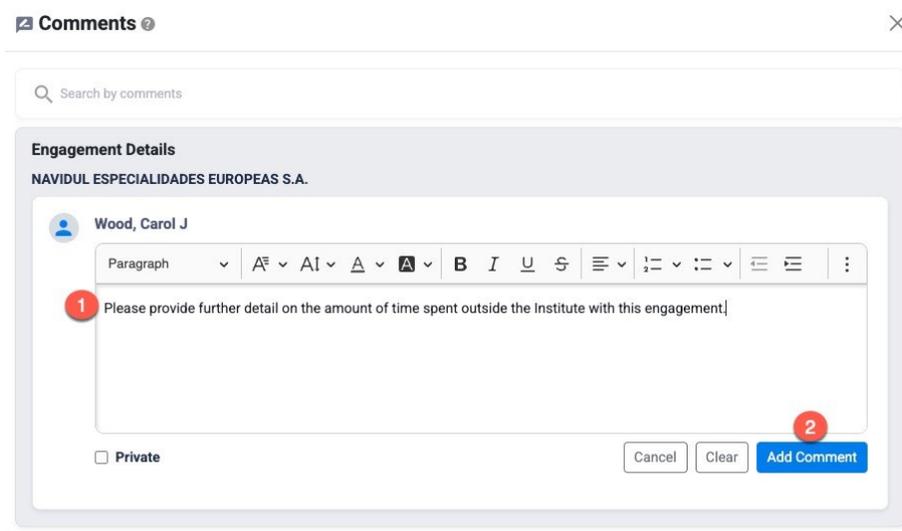


Figure 12 – Reviewer Comment to Reporter

2. The **Reporter and/or Reviewer(s)** can then reply to the **Reviewer** through the system. Replies are in the shaded box:

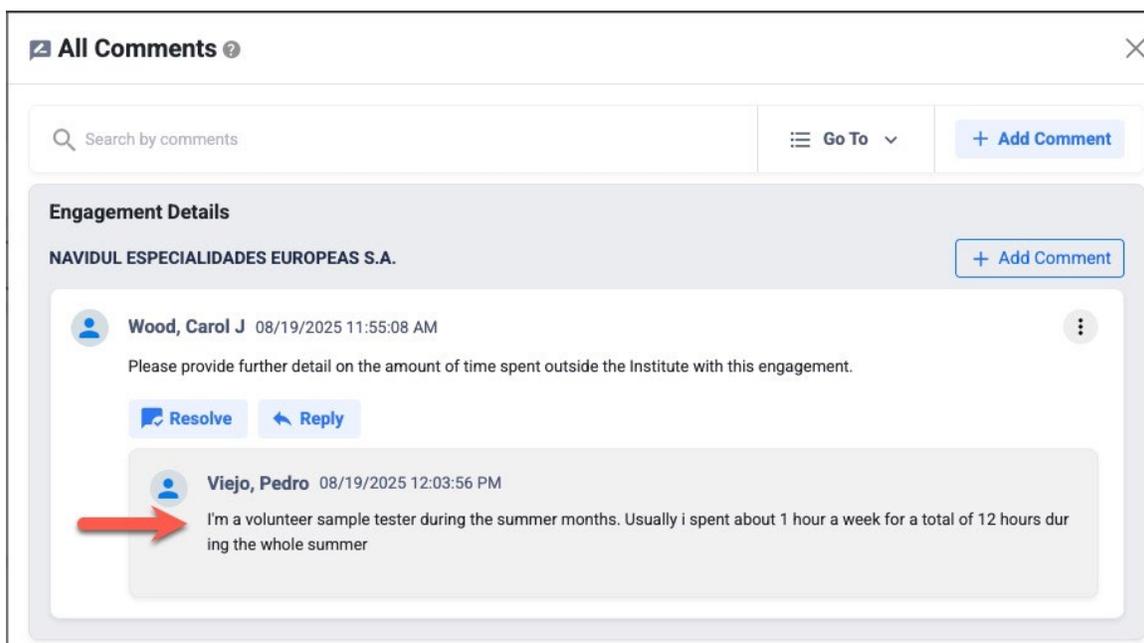


Figure 13 – Reporter Comment to Reviewer

Ad Hoc Reviewers can also reply. Replies are in the shaded box:

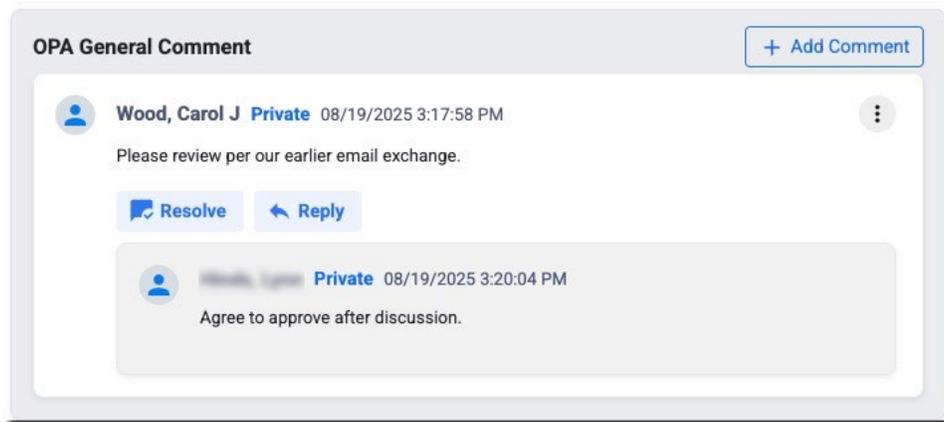


Figure 14 - Comment Reply

Comments View: Who can see which comments?

Reporters will only see comments that are public, such as their personal exchanges with **Reviewers**:

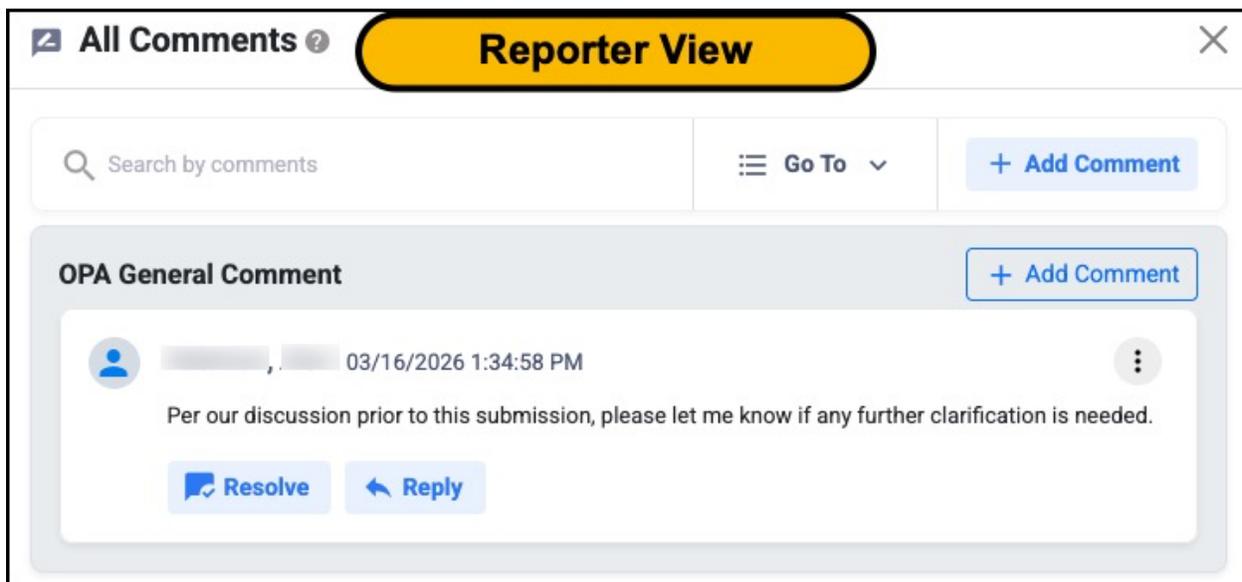


Figure 15 - Reporter Comments View

Comments marked as **Private** are viewable only by those with **Approver/Reviewer** roles.

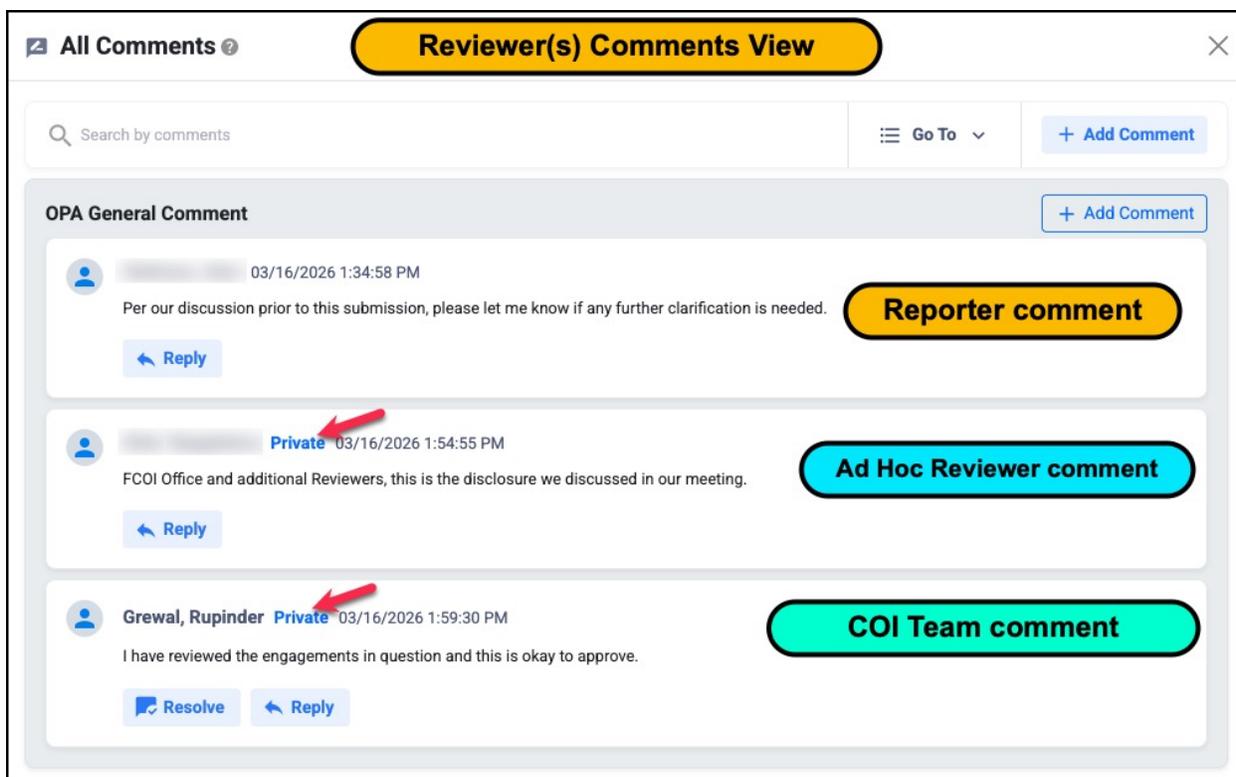


Figure 16 - Reviewers Comments View

Comments Notifications

When a **Comment** is made in a disclosure, a notification email is sent. **Recipients** of these notifications are all the participants in the disclosure submission and review:

- Reporter
- COI administrators
- COI Reviewers (ad hoc)
- OPA routing approvers / ad hoc reviewers
- CA for project level comments only

These notifications will be sent hourly in digest form, and private comments will not be visible.

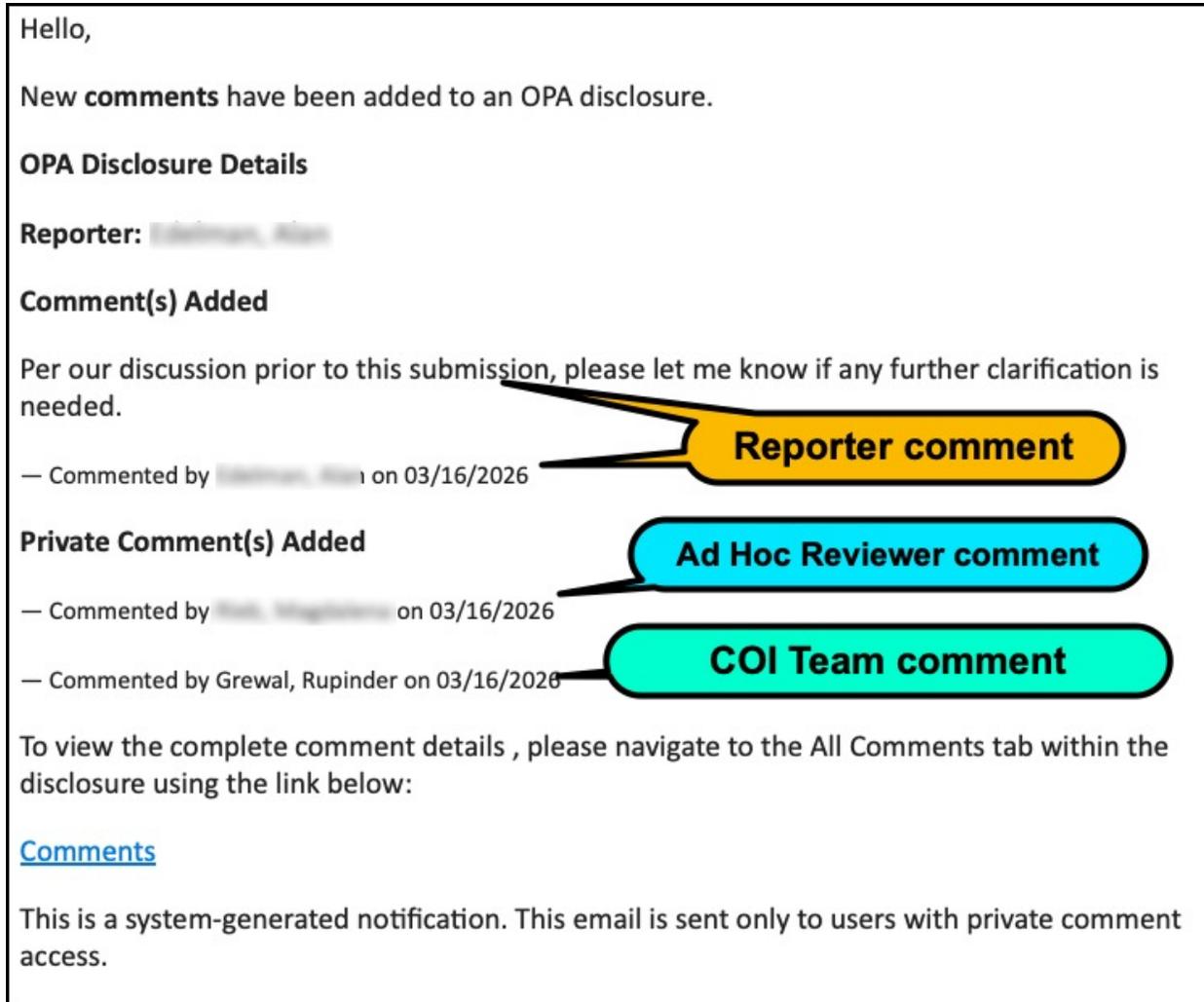


Figure 17 - Comments Email Notification

Action Buttons and Review

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

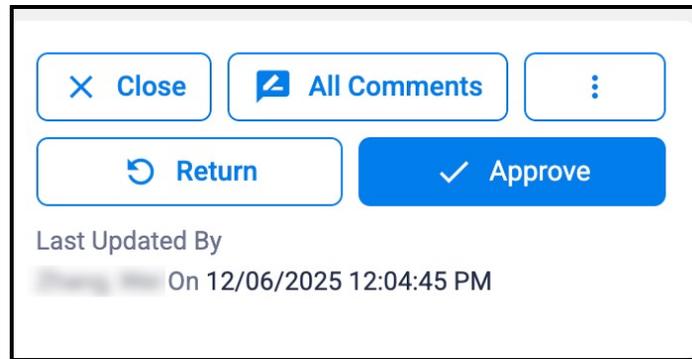


Figure 18 - Actions Area

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

Return the disclosure to the **Reporter**.

Approve the disclosure.

Clicking on the ellipsis button presents an option to **Print** the disclosure, which will download it in PFD format.

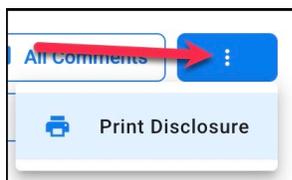


Figure 19 - Print

Approval/Return

Whether approving or returning the disclosure, the Approver can upload an attachment if desired.

Clicking will cause a pop-up window to display. The mandatory *Reason for Return* field is free text. Click to send it back to the **Reporter**.

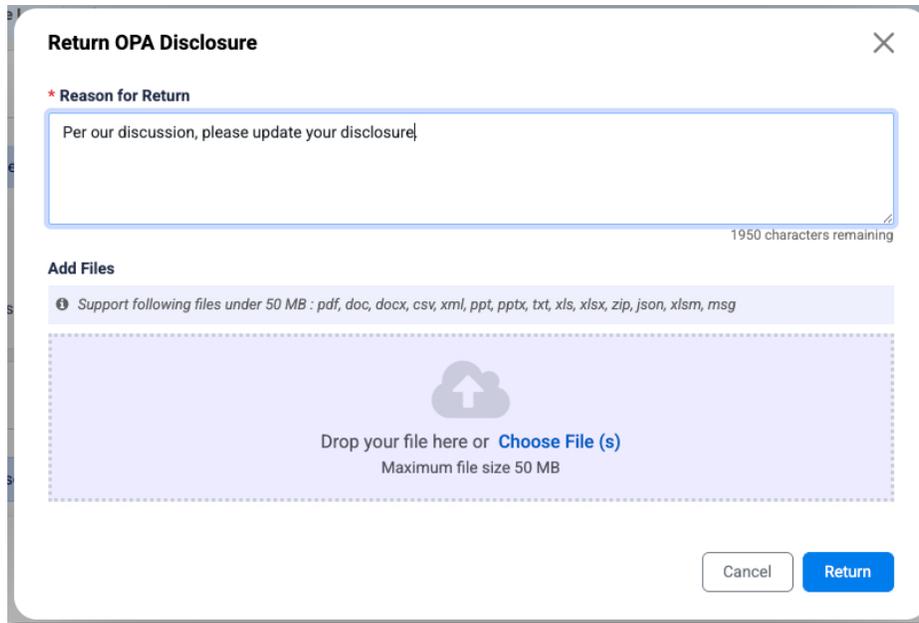


Figure 20 - OPA Return Window

Depending on the stage of approval routing, (e.g., if it must first be approved by COI Team) clicking  will either finalize the approval of the disclosure, or it will move on to the next approval stop.

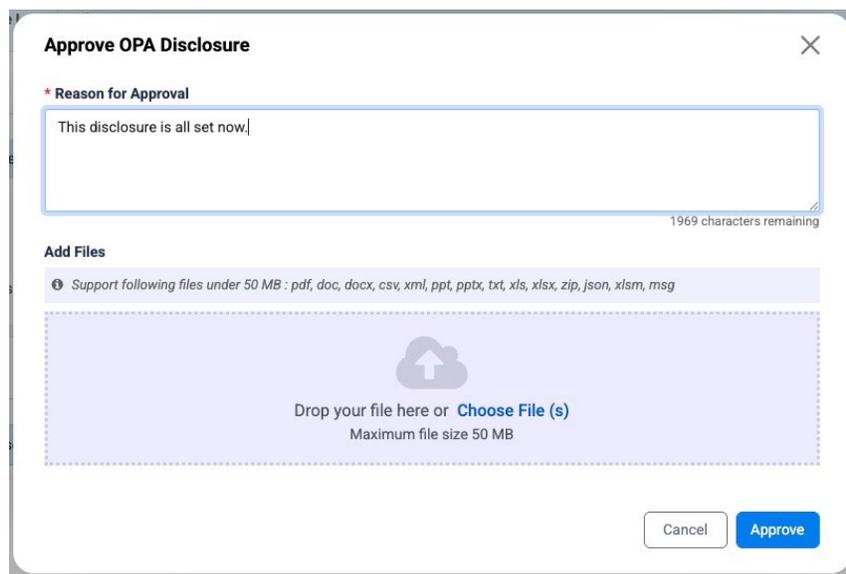


Figure 21 - OPA Approve Window

Routing

The Approval Routing map can be viewed by clicking on the **Route Log** tab.

If a **Reporter** has disclosed an existing FCOI disclosure and discloses an FCOI while undergoing the OPA disclosure process, the **COI Team** will be first in the approval routing, then followed by **OPA Approvers**.

The screenshot displays the 'OPA - Initial' interface. At the top, there are 'Dates' (Create: 01/29/2026, Submission: 03/16/2026, Expiration: 03/15/2027) and 'Status' (Approval: Pending, OPA Disclosure: Routing in progress). The 'Route Log' section shows two steps: '1-COI Administrator... Waiting For Approval' and '2-OPA Department ... To Be Submitted'. A callout bubble points to the first step with the text 'Currently with COI Team'. Another callout bubble points to the second step with the text 'Will not be able to approve until COI Team has approved.'

Figure 22 - Approval Routing

The screenshot displays the 'OPA - Initial' interface. At the top, there are 'Dates' (Create: 01/29/2026, Submission: 03/16/2026, Expiration: 03/15/2027) and 'Status' (Approval: Pending, OPA Disclosure: Routing in progress). The 'Route Log' section shows two steps: '1-COI Administrator... Waiting For Approval' and '2-OPA Department ... To Be Submitted'. A callout bubble points to the first step with the text 'No Approval button showing yet because the disclosure is awaiting COI Team approval.'

Figure 23 - Awaiting COI Team Approval