

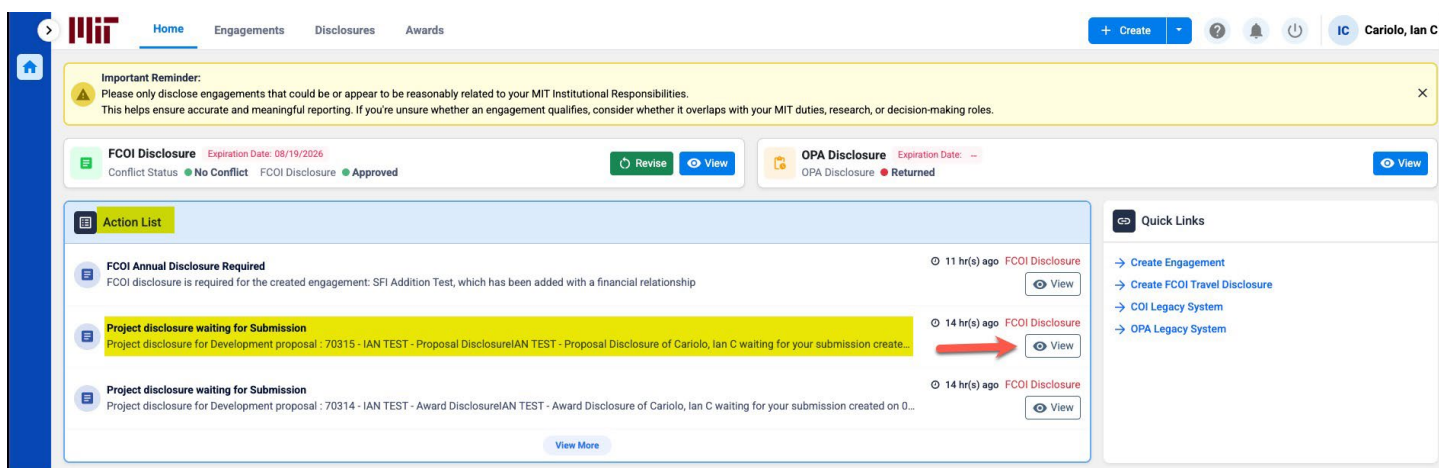
Proposal FCOI Disclosure

Accessing the MyCOI-OPA+ Tool

Access the unified disclosure tool [MyCOI-OPA+](#)

Dashboard

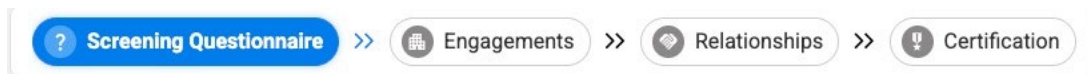
Upon first entering the system, the **Reporter** will be brought directly to their Dashboard. Any outstanding action items will be listed in the **Action List** window. In the example below, there is a new sponsored project **proposal** in which the **Reporter** has been named. Based on FCOI disclosure policy criteria, they need to complete a proposal FCOI Disclosure.



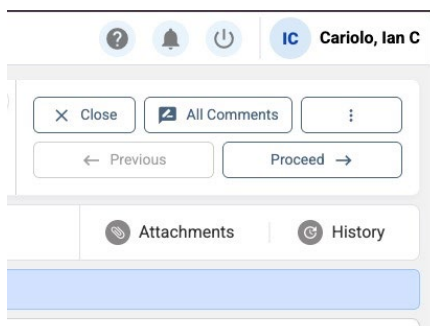
Completing a Proposal FCOI Disclosure

1. Click the button to the right of the relevant item in the Action List window.

The navigation bar denotes which section the Reporter is viewing.



2. Once in the disclosure, in the upper right corner of the screen will be the **Actions** area:



- Close** – This button will return the Reporter to the Disclosures section
- All Comments** – Any correspondence between the **Reporter** and **Reviewer**
- Three Dot Ellipsis** – Print the Disclosure
- Previous** – Return to prior screen
- Proceed** – Move to next screen
- Attachments** – Provides an area for the **Reporter** to upload pertinent documentation for the **Reviewer**
- History** – Actions taken by the **Reporter** and **Reviewer**


? Screening Questionnaire

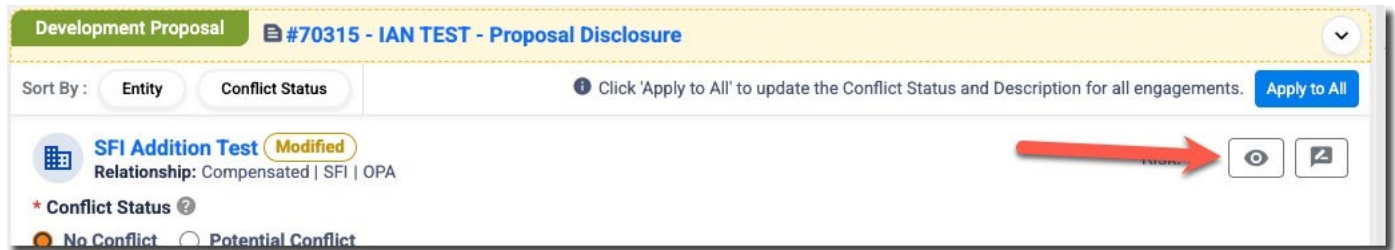
The first section is . These static, non-editable questions are taken from the KC proposal, and they are the three SFI screening questions contained within the proposal's certification questionnaire. If any of the answers are **Yes**, upon completing the KC proposal certification the user will see a pop-up window that indicates they now need to complete a proposal FCOI disclosure. The user can either click OK and be automatically brought to MYCOI-OPA+, or they can click Cancel and revisit the proposal disclosure at their convenience.

NOTE: The proposal will **not** be able to route for approval until the proposal disclosure is complete.

3. To move on to **Engagements**, click **Proceed →** in the navigation bar or the lower right.

Engagements

1. If no Engagements need to be added to your portfolio, just click [Proceed →](#) to move onto [Relationships](#).
2. If needed, [create an Engagement \[PDF\]](#) – **outside professional activity or significant financial interest** with external entities which could be or appear to be [Reasonably Related](#) to your [MIT Institutional Responsibilities](#).
3. If an Engagement **does** exist, the the Reporter will then need to explain in detail its **Relationship** to how their work or role with the Engagement does or does not relate to their MIT sponsored research projects and identify whether or not they believe there is a **real** or **potential** conflict of interest.
 - a. If it is necessary to **modify** an existing **Engagement**, click the  to the right of the **Entity name**.





Development Proposal #70315 - IAN TEST - Proposal Disclosure

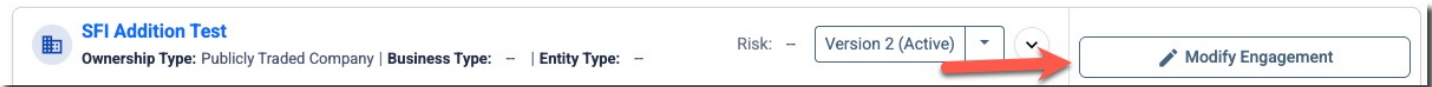
Sort By: Entity Conflict Status [Click 'Apply to All' to update the Conflict Status and Description for all engagements.](#) [Apply to All](#)

SFI Addition Test Modified
Relationship: Compensated | SFI | OPA


* Conflict Status [?](#)
☒ No Conflict ☐ Potential Conflict

- b. A pop-up window will open. Click [Modify Engagement](#) to make any edits.



SFI Addition Test
Ownership Type: Publicly Traded Company | Business Type: - | Entity Type: -

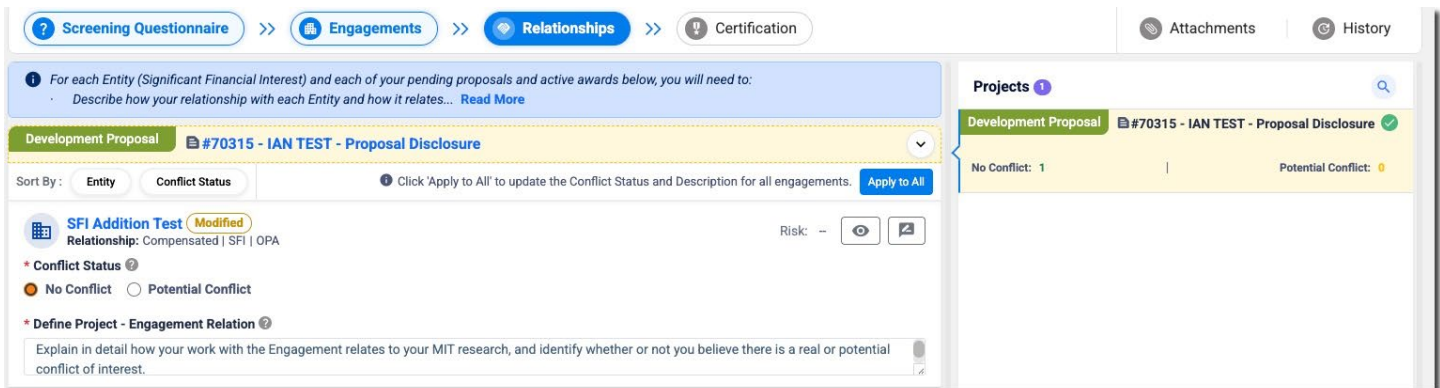
Risk: - Version 2 (Active) 

[Modify Engagement](#)

4. Once Engagement information has been completed, click [Proceed →](#) to move on to [Relationships](#).

Relationships

Relationships will then need to be defined in the **Define Project - Engagement Relation** field.



[Screening Questionnaire](#) >> [Engagements](#) >> [Relationships](#) >> [Certification](#) [Attachments](#) [History](#)

For each Entity (Significant Financial Interest) and each of your pending proposals and active awards below, you will need to:
Describe how your relationship with each Entity and how it relates... [Read More](#)

Development Proposal #70315 - IAN TEST - Proposal Disclosure


Sort By: Entity Conflict Status [Click 'Apply to All' to update the Conflict Status and Description for all engagements.](#) [Apply to All](#)

SFI Addition Test Modified
Relationship: Compensated | SFI | OPA

* Conflict Status [?](#)
☒ No Conflict ☐ Potential Conflict

* Define Project - Engagement Relation [?](#)
Explain in detail how your work with the Engagement relates to your MIT research, and identify whether or not you believe there is a real or potential conflict of interest.

Projects [1](#) [Search](#)

Development Proposal #70315 - IAN TEST - Proposal Disclosure 

No Conflict: 1 | Potential Conflict: 0

1. For each Entity (Significant Financial Interest) and/or each pending Proposal and active Award, the **Reporter** needs to:
 - Describe how their relationship with each Entity does or does not relate to their sponsored projects.
 - Identify whether or not they believe there is a real or potential Conflict of Interest.
 - **Please note:** "none", "no relationship", or "N/A" **are not** acceptable relationship descriptions. Examples below:

“There is no relationship between the work performed for this entity and this project, as this project involves the development of a rapid diagnostic for biosensing of diseases, which is not in the area of Entity's interest.”

“This entity’s business has nothing to do with the project regarding device for electrical & chemical modulation of pathological neural activity.”

“This project involves organizing a computational conference on sustainability. My activity with this entity involves providing strategic advice on applying autonomous systems to mechatronics.”

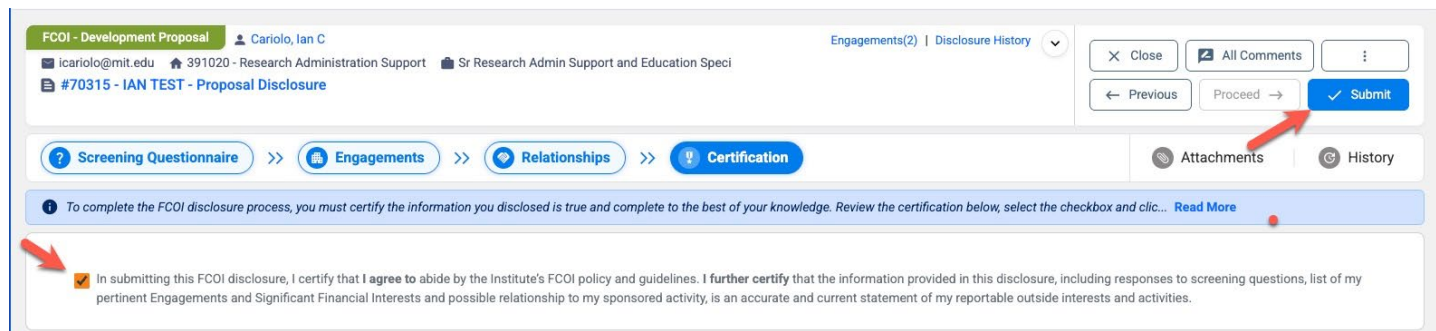
2. After the information has been completed in the **Define Project - Engagement Relation** field, click  to move on to .

Certification

1. In the  section, the **Reporter** clicks the checkbox, attesting,

*“In submitting this FCOI disclosure, I certify that **I agree to** abide by the Institute’s FCOI policy and guidelines. **I further certify** that the information provided in this disclosure, including responses to screening questions, list of my pertinent Engagements and Significant Financial Interests and real or potential relationship to my sponsored activity, is an accurate and current statement of my reportable outside interests and activities.”*

2. Then clicking the  to complete the disclosure.



The screenshot displays the FCOI disclosure form interface. At the top, the header includes 'FCOI - Development Proposal' and the user's name 'Cariolo, Ian C'. Below this, there are links for 'Engagements(2)' and 'Disclosure History'. The main navigation bar contains buttons for 'Screening Questionnaire', 'Engagements', 'Relationships', and 'Certification', with 'Certification' being the active step. On the right side of the navigation bar, there are buttons for 'Close', 'All Comments', 'Previous', 'Proceed', and 'Submit'. A red arrow points to the 'Submit' button. Below the navigation bar, a blue banner contains a message: 'To complete the FCOI disclosure process, you must certify the information you disclosed is true and complete to the best of your knowledge. Review the certification below, select the checkbox and clic... Read More'. Below this banner, there is a checkbox labeled 'In submitting this FCOI disclosure, I certify that I agree to abide by the Institute’s FCOI policy and guidelines. I further certify that the information provided in this disclosure, including responses to screening questions, list of my pertinent Engagements and Significant Financial Interests and possible relationship to my sponsored activity, is an accurate and current statement of my reportable outside interests and activities.' A red arrow points to the checkbox.