

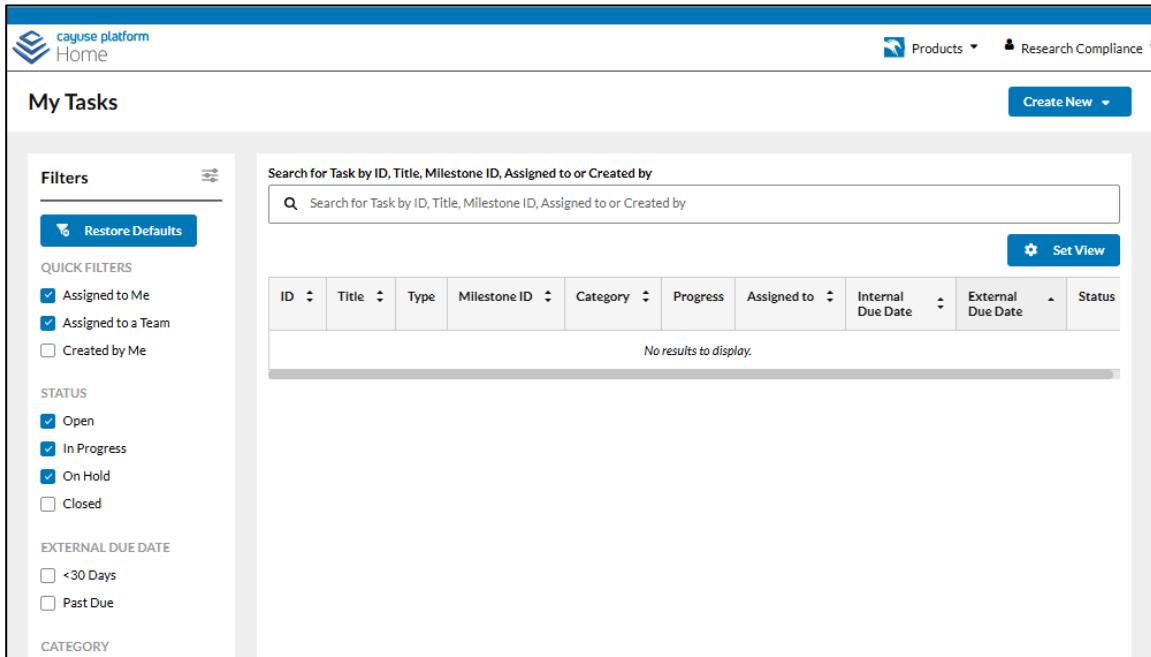
User Guide: How to Complete a Research Based Disclosure in Cayuse

About the Research Based Disclosure

A Research Based Disclosure (RBD) is tied to a specific project and is required at both the proposal review stage and the award review stage. When a PI/Department is ready to begin the university proposal review process, they select the “Route for Review” button in the Cayuse Proposal form. This action automatically sends an email to all individuals listed as key personnel on the project, notifying them that a RBD is required. The email includes a direct link to access the RBD for that specific project. All key personnel must have an approved RBD on file with ORC&S before the proposal is submitted to the sponsor and again before the award can be fully established.

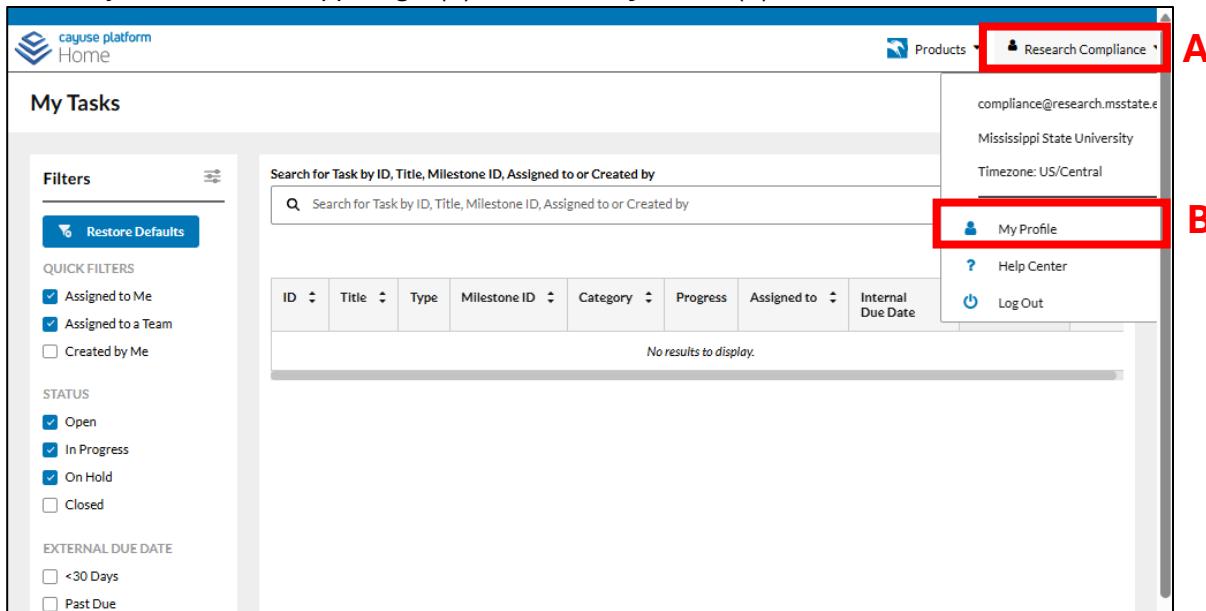
RBD Instructions

1. Open the RBD email you received for your project and click the link included in the message. This link will take you directly to your RBD to complete it. If you do not see the email, check your junk or spam folder. (If you access the RBD using this link, you may skip to Step 6 of these instructions).
2. If you have deleted or are unable to locate the RBD email, you can still access your RBD by logging into Cayuse. To do so, go to <https://msstate.app.cayuse.com/> and use your NetID and password to log into the system. You should see a home page like that below.



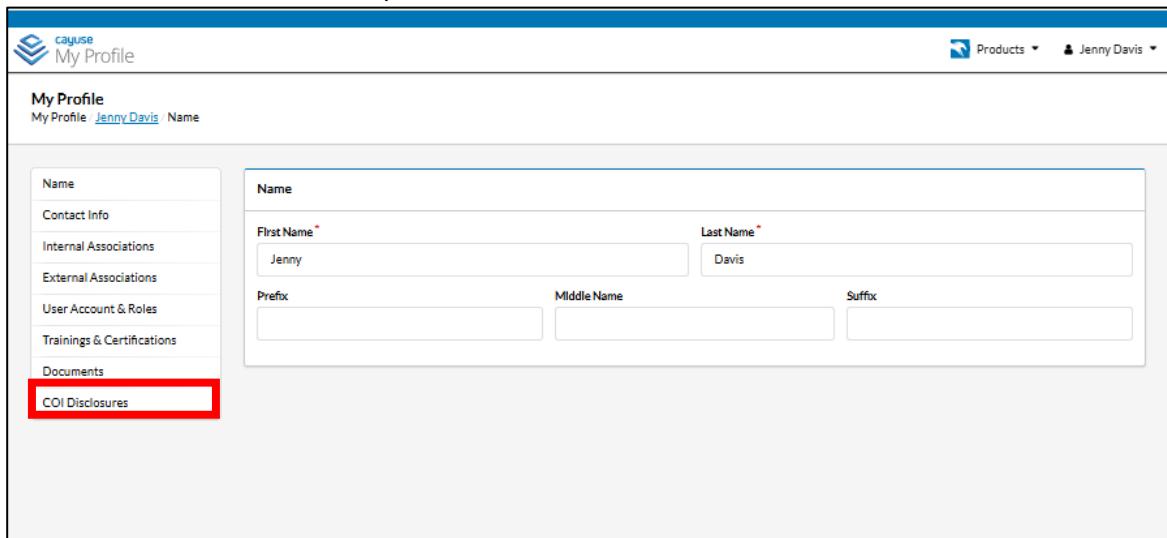
The screenshot shows the Cayuse platform interface for managing tasks. At the top, there are navigation links for 'cayuse platform Home', 'Products', 'Research Compliance', and a 'Create New' button. The main area is titled 'My Tasks' and features a search bar with the placeholder 'Search for Task by ID, Title, Milestone ID, Assigned to or Created by'. On the left, there is a 'Filters' sidebar with sections for 'QUICK FILTERS' (checkboxes for 'Assigned to Me', 'Assigned to a Team', and 'Created by Me'), 'STATUS' (checkboxes for 'Open', 'In Progress', 'On Hold', and 'Closed'), 'EXTERNAL DUE DATE' (checkboxes for '<30 Days' and 'Past Due'), and 'CATEGORY'. The main content area displays a table header with columns: ID, Title, Type, Milestone ID, Category, Progress, Assigned to, Internal Due Date, External Due Date, and Status. Below the header, a message reads 'No results to display.'

3. Click on your name in the upper right (A), then click **My Profile** (B).



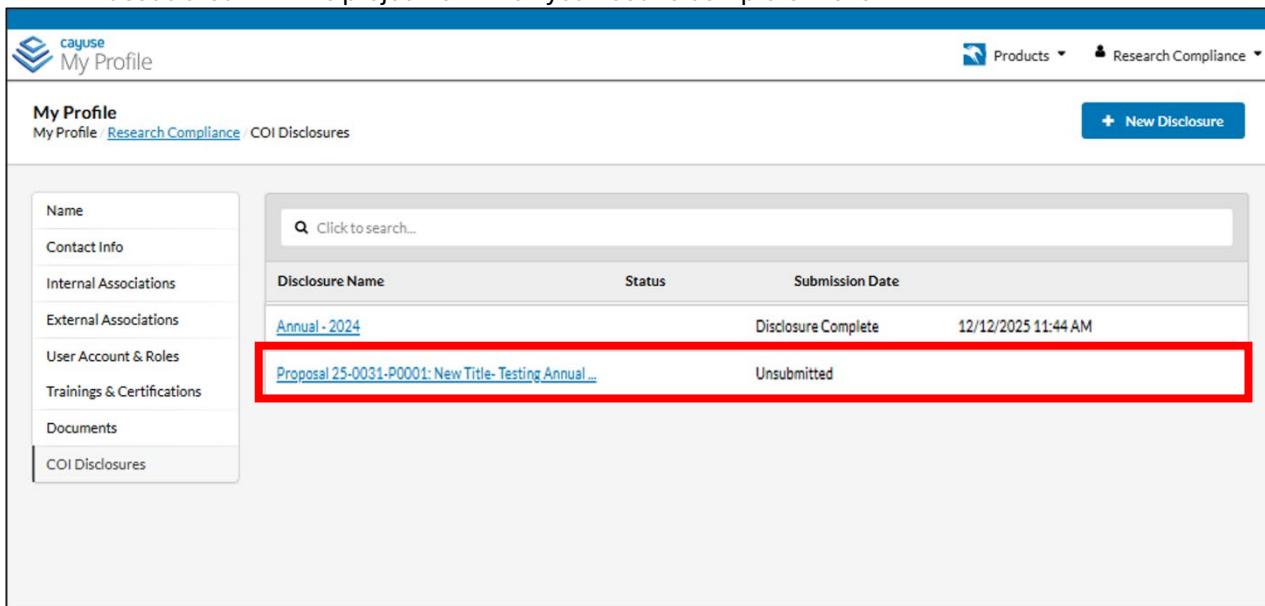
The screenshot shows the Cayuse platform Home page. At the top right, there is a user profile dropdown menu with the following options: Products, Research Compliance (highlighted with a red box A), compliance@research.msstate.edu, Mississippi State University, Timezone: US/Central, My Profile (highlighted with a red box B), Help Center, and Log Out. The main content area is titled "My Tasks" and contains a search bar and a table with columns: ID, Title, Type, Milestone ID, Category, Progress, Assigned to, and Internal Due Date. The table displays the message "No results to display."

4. Click on **COI Disclosures** in the panel on the left.



The screenshot shows the "My Profile" page for the user "Jenny Davis". On the left, there is a sidebar with the following options: Name, Contact Info, Internal Associations, External Associations, User Account & Roles, Trainings & Certifications, Documents, and COI Disclosures (highlighted with a red box). The main content area is titled "Name" and contains fields for First Name (Jenny), Last Name (Davis), Prefix, Middle Name, and Suffix. The "Name" section is preceded by a "My Profile" header with the user's name and a "Products" dropdown.

5. This brings you to your COI Disclosures dashboard page where you can see all of your disclosures. Select the RBD associated with the project for which you need to complete the form.



The screenshot shows the Cayuse My Profile COI Disclosures dashboard. The top navigation bar includes the Cayuse logo, 'My Profile' link, 'Products' dropdown, and 'Research Compliance' dropdown. The main content area is titled 'My Profile' and shows a search bar with 'Click to search...'. Below the search bar is a table with three columns: 'Disclosure Name', 'Status', and 'Submission Date'. The table contains two rows. The first row, 'Annual - 2024', has a status of 'Disclosure Complete' and a submission date of '12/12/2025 11:44 AM'. The second row, 'Proposal 25-0031-P0001: New Title- Testing Annual...', has a status of 'Unsubmitted'. A red box highlights the second row. On the left, a sidebar lists navigation links: Name, Contact Info, Internal Associations, External Associations, User Account & Roles, Trainings & Certifications, Documents, and COI Disclosures. The 'COI Disclosures' link is the active one, indicated by a blue border.

Disclosure Name	Status	Submission Date
Annual - 2024	Disclosure Complete	12/12/2025 11:44 AM
Proposal 25-0031-P0001: New Title- Testing Annual...	Unsubmitted	

6. The RBD includes several sections listed on the left side of the screen (A). Red numbers next to a section indicate questions or items that must be completed before you can move to the next section. This is a dynamic form, so additional questions may appear based on your responses.

Section 1: FCOI Policy & Training

For this section, review MSU Operating Policy 70.09 and the definitions provided. After reviewing the information, select the acknowledgement box (B) at the bottom of the page. Once selected, the red number next to the FCOI Policy & Training section will change to a green checkmark, indicating that you may proceed. Click the **Next** button (C) to continue to the next section.

A **FCOI Policy & Training**

B **Acknowledgment***
 I acknowledge the FCOI disclosure and training requirements set forth in OP 70.09.

C **Next**

Profile / Research Compliance / COI Disclosures / Disclosure Form

Print to PDF Submit

All Changes Save Automatically

Previous **Next**

MSU Operating Policy 70.09

Definitions

Significant Financial Interest (SFI) - a financial interest consisting of one or more of the following that is related to your Institutional Responsibilities:

- \$5,000 or more in salary, consulting fees, advisory board fees, remuneration, honoraria, gifts, or "in-kind" compensation from an outside entity in the past 12 months;
- \$5,000 or more in equity or ownership interest (including stock options) in a publicly-traded company;
- Any equity or ownership interest in a private company (e.g., start-up company);
- An appointment to serve in a fiduciary role (director, officer, partner, trustee, or any position of management) for an outside company whether or not remuneration is received;
- Receipt of venture or other capital financing;
- Receipt of patent/copyright licensing fees or royalties from an outside entity;
- Any travel that is sponsored or reimbursed by an outside entity; or
- Any compensation whose value could be affected by the outcome of research conducted at MSU.

Institutional Responsibilities - an investigator's professional responsibilities on behalf of MSU, which may include for example (but not limited to): activities such as research, consultation, teaching, professional practice, institutional committee memberships, and service on committees such as the Institutional Review Board or the Institutional Animal Care and Use Committee.

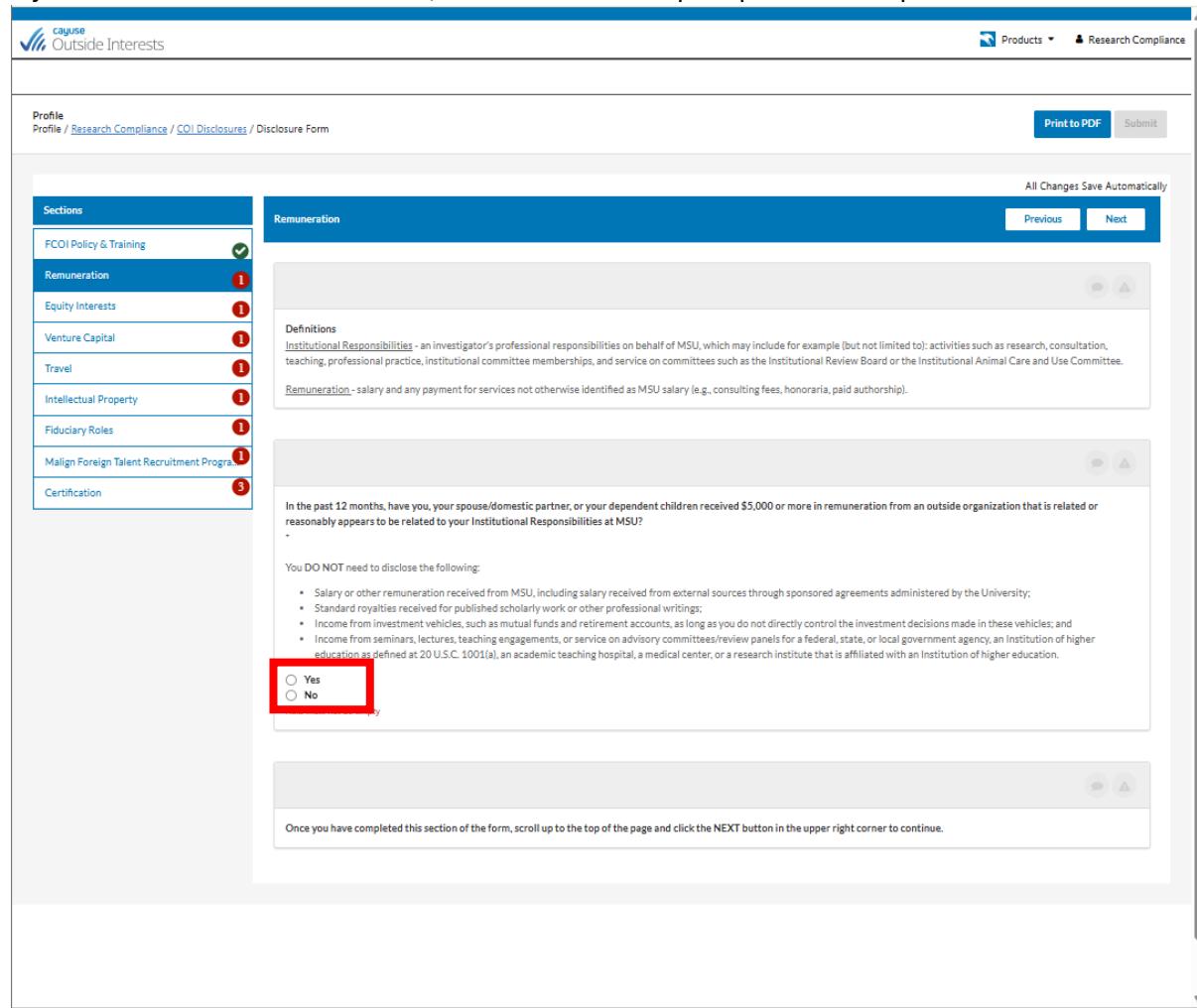
Scroll up to the top of the page and click the NEXT button in the upper right corner to continue.

7. Section 2: Remuneration

This section asks one required question: *In the past 12 months, have you, your spouse/domestic partner, or your dependent children received \$5,000 or more in remuneration from an outside organization that is related or reasonably appears to be related to your Institutional Responsibilities at MSU?*

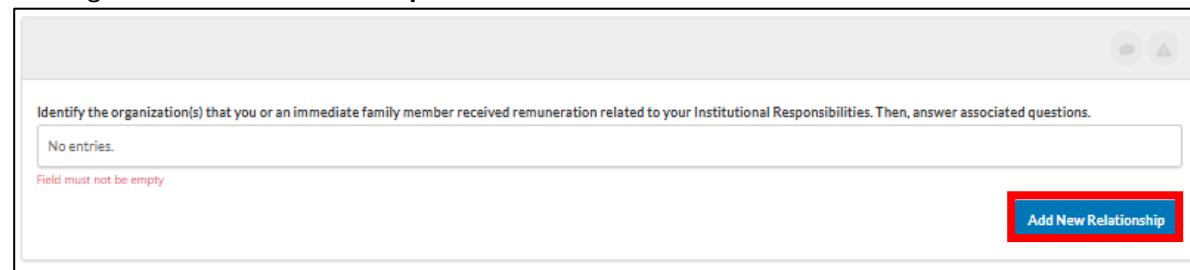
If you have nothing to disclose, select **No** and click the **Next** button in the upper right to move on to the next section.

If you have remuneration to disclose, select **Yes**. This will prompt additional questions.



The screenshot shows the 'Remuneration' section of the Cayuse Outside Interests form. The left sidebar lists sections: FCOI Policy & Training (green checkmark), Remuneration (red 1), Equity Interests (red 1), Venture Capital (red 1), Travel (red 1), Intellectual Property (red 1), Fiduciary Roles (red 1), Malign Foreign Talent Recruitment Program (red 1), and Certification (red 3). The 'Remuneration' section is active, showing definitions for Institutional Responsibilities and Remuneration, and a question asking if the user has received \$5,000 or more in remuneration. A red box highlights the 'Yes' radio button. Below the question, a list of examples is provided. A red box also highlights the 'Add New Relationship' button at the bottom right of the page.

In disclosing your remuneration, the first step is to identify the organization that provided the remuneration by clicking the **Add New Relationship** button.



The screenshot shows the 'Add New Relationship' dialog box. It contains a text area with the instruction: 'Identify the organization(s) that you or an immediate family member received remuneration related to your Institutional Responsibilities. Then, answer associated questions.' Below this is a text input field with the placeholder 'No entries.' and a red error message 'Field must not be empty.' A red box highlights the 'Add New Relationship' button at the bottom right.

Enter the organization's name in the box. If the organization is already in the Cayuse system, it will appear as you type. If it is not listed, click **Request New External Org**, enter the organization's name, and a Cayuse administrator will get it added to the system. (Note: You may continue completing and submitting your disclosure while your organization is under review by a Cayuse administrator.)

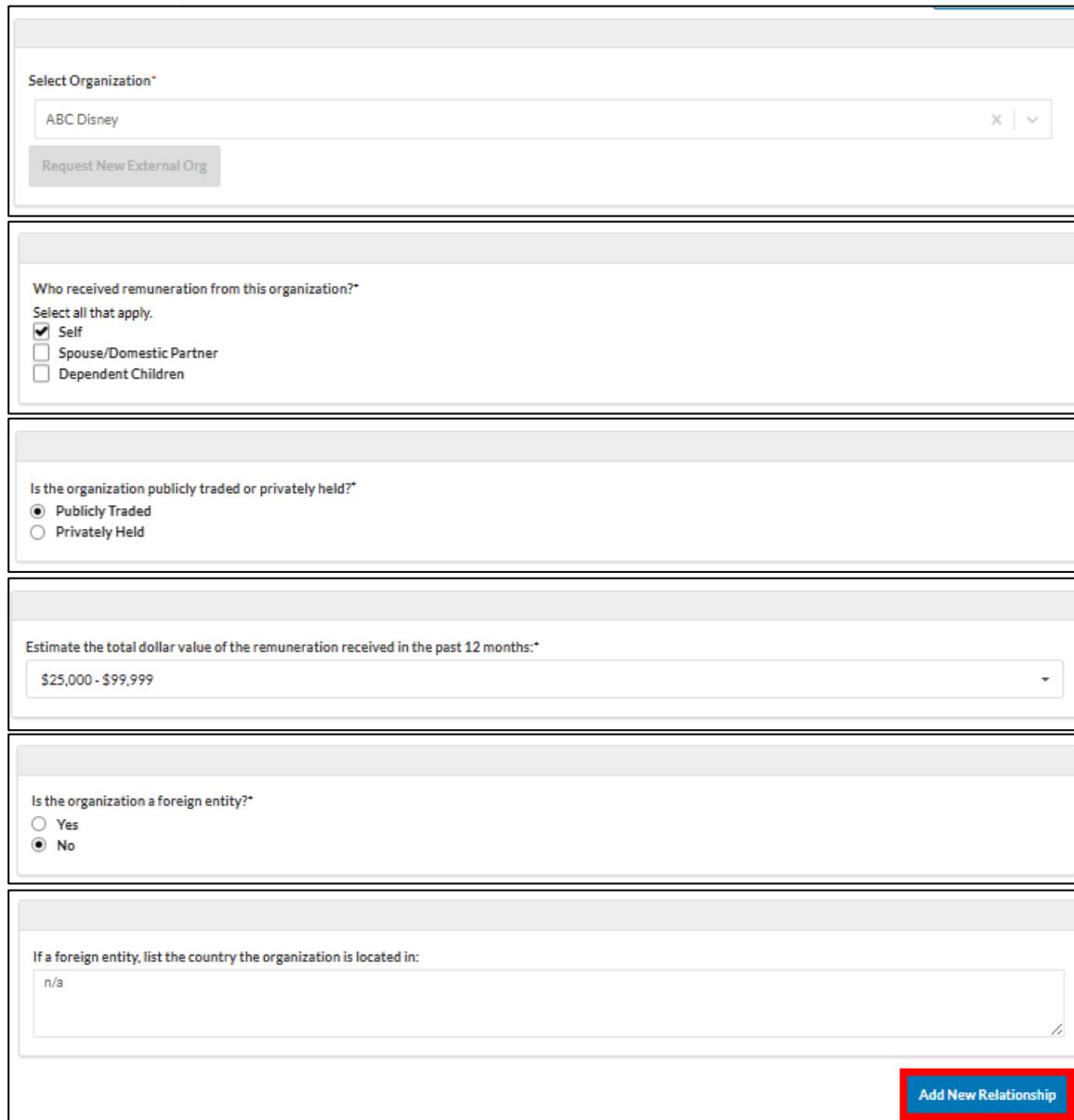


Select Organization*

Request New External Org

Field must not be empty

After selecting the organization for your remuneration, answer the set of questions as they relate to that organization. For example, if you select ABC Disney, respond to the questions based on remuneration received from ABC Disney.



Select Organization*

ABC Disney

Request New External Org

Who received remuneration from this organization?*
Select all that apply.

Self
 Spouse/Domestic Partner
 Dependent Children

Is the organization publicly traded or privately held?*

Publicly Traded
 Privately Held

Estimate the total dollar value of the remuneration received in the past 12 months:*

\$25,000 - \$99,999

Is the organization a foreign entity?*

Yes
 No

If a foreign entity, list the country the organization is located in:

n/a

Add New Relationship

To report additional organizations, click the **Add New Relationship** button and complete the same set of questions for each organization.

After entering all organizations associated with your remuneration, there are two questions to answer in this section regarding remuneration and consulting.

<p>Is the remuneration disclosed above for consulting services that you provide?*</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>
<p>Select the statement(s) which best describes your consulting work.*</p> <p><input type="checkbox"/> My consulting work requires research. <input type="checkbox"/> My consulting work does not involve performing research, but is related to my research portfolio and may have the ability to impact funding, alter time or effort commitments, or otherwise impact scientific integrity. <input type="checkbox"/> My consulting work requires through a contract for me to conceal or withhold confidential financial or other ties between myself and the entity, irrespective of the duration of the engagement. <input type="checkbox"/> My consulting work does not fit into any of the categories listed above.</p> <p>Field must not be empty</p>
<p>Once you have completed this section of the form, scroll up to the top of the page and click the NEXT button in the upper right corner to continue.</p>

The last question in this section asks you to briefly describe in the text box how the remuneration you've disclosed above is related to the work on this specific project. If there is no relationship, just state that they are not related in any way.

<p>Briefly describe how the remuneration disclosed above relates to the work (proposed or awarded) of this sponsored project. If there is no relationship, please state this.</p> <p>+</p> <p>Field must not be empty</p>

Then, scroll to the top of the page, confirm there is a green checkmark next to the Remuneration section, and click the **Next** button in the upper right to continue to the next section of the disclosure form.

<p>cayuse Outside Interests</p> <p>Profile / Research Compliance / COI Disclosures / Disclosure Form</p> <p>Products ▾ Research Compliance</p> <p>Print to PDF Submit</p>	<p>All Changes Save Automatically</p> <p>Sections</p> <table border="1"><tr><td>FCOI Policy & Training</td><td>✓</td></tr><tr><td>Remuneration</td><td>✓</td></tr><tr><td>Equity Interests</td><td>1</td></tr><tr><td>Venture Capital</td><td>1</td></tr><tr><td>Travel</td><td>1</td></tr><tr><td>Intellectual Property</td><td>1</td></tr><tr><td>Fiduciary Roles</td><td>1</td></tr></table> <p>Remuneration</p> <p>Definitions</p> <p>Institutional Responsibilities - an investigator's professional responsibilities on behalf of MSU, which may include for example (but not limited to): activities such as research, consultation, teaching, professional practice, institutional committee memberships, and service on committees such as the Institutional Review Board or the Institutional Animal Care and Use Committee.</p> <p>Remuneration - salary and any payment for services not otherwise identified as MSU salary (e.g., consulting fees, honoraria, paid authorship).</p> <p>Previous Next</p>	FCOI Policy & Training	✓	Remuneration	✓	Equity Interests	1	Venture Capital	1	Travel	1	Intellectual Property	1	Fiduciary Roles	1
FCOI Policy & Training	✓														
Remuneration	✓														
Equity Interests	1														
Venture Capital	1														
Travel	1														
Intellectual Property	1														
Fiduciary Roles	1														

- The next six sections of the disclosure form (Equity Interests, Venture Capital, Travel, IP, Fiduciary Roles, and Malign Foreign Talent Recruitment Program) work the same way as the Remuneration section. Answer all questions in each section, then click the **Next** in the upper right to proceed to the next section.
- The final section is Certification, where you acknowledge the FCOI requirements and certify that the information you have provided is true, complete, and accurate.

After completing all required questions, confirm that every section has a green checkmark. Then, click the **Submit** button in the upper right to submit your disclosure.

Profile Products Research Compliance

Profile / Research Compliance / COI Disclosures / Disclosure Form

Print to PDF **Submit**

Sections

FCOI Policy & Training ✓

Remuneration ✓

Equity Interests ✓

Venture Capital ✓

Travel ✓

Intellectual Property ✓

Fiduciary Roles ✓

Malign Foreign Talent Recruitment Program ✓

Certification ✓

Acknowledgement*
I understand that:

1. The statements and representations made herein are material to the US Government's funding decision;
2. I have the responsibility to update my Disclosure at least annually during the performance of an active award;
3. This form does not grant approval by MSU for outside employment activities (See [Policy HRM 60.415](#));
4. I will submit an updated Disclosure form within 30 days of any changes to my financial interests, other support, or Malign Foreign Talent Recruitment Program activities; and
5. I need to disclose what is required of me by NSPM-33 where it is appropriate (see details here - [NSTC Pre-award and Post-award Disclosures](#)).

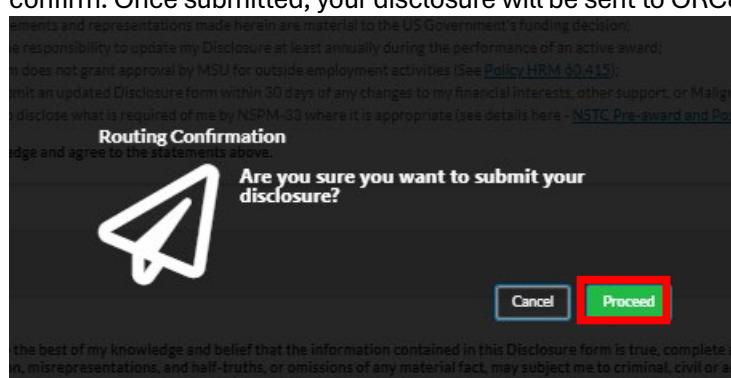
I acknowledge and agree to the statements above.

Certification*
 I certify to the best of my knowledge and belief that the information contained in this Disclosure form is true, complete and accurate. I understand that any false, fictitious, or fraudulent information, misrepresentations, and half-truths, or omissions of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims, or otherwise. I understand that this Disclosure is required to obtain funding from the U.S. Government and to be compliant with Mississippi State University.

Enter your MSU netID*: msu123

Attach any relevant documents, if applicable.
Drag and drop new files or [click](#) to select from file system...

- A confirmation window will appear asking if you want to submit your disclosure. Click the **Proceed** button to confirm. Once submitted, your disclosure will be sent to ORC&S for review.



What happens after I submit my disclosure?

After you submit your disclosure, it will enter a queue for ORC&S to review and approve. Our office monitors this queue regularly throughout the day. Because Cayuse updates overnight, the approval status may not be visible to you or staff in the Office of Sponsored Programs until the following day.

Where can I view the status of my disclosure form?

Investigators can view all of their disclosures and check the status of each on their COI Disclosure page in Cayuse. The status of a disclosure will be listed as “Unsubmitted,” “Under Review,” or “Disclosure Complete.” To access your COI Disclosure page:

- Log in to Cayuse at <https://msstate.app.cayuse.com/>
- Click on your name in the upper right, then select “My Profile”
- Once on your My Profile page, select “COI Disclosures” under the tab on the lefthand side
- Once on your COI Disclosures page, you will be able to view all disclosures that you have completed through the Cayuse system

Questions

If you have additional questions about the disclosure process or how to complete your form, see information on our [ORC&S webpage](#) or contact Jenny Davis at jdavis@orc.msstate.edu or (662) 325-4174.