



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 COI Disclosure dashboard where you will find the specific RBD for you to complete. 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 5 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 'My Tasks' dashboard in the Cayuse platform. The top navigation bar includes the 'cayuse platform Home' logo and a 'Products' dropdown menu. The main content area is titled 'My Tasks' and features a 'Create New' button. On the left, there are 'Filters' and 'QUICK FILTERS' sections. The 'QUICK FILTERS' section includes checkboxes for 'Assigned to Me', 'Assigned to a Team', 'Created by Me', 'Open', 'In Progress', 'On Hold', and 'Closed'. The 'STATUS' section includes checkboxes for 'Open', 'In Progress', 'On Hold', and 'Closed'. The 'EXTERNAL DUE DATE' section includes checkboxes for '<30 Days' and 'Past Due'. The 'CATEGORY' section is partially visible. The main table has columns: ID, Title, Type, Milestone ID, Category, Progress, Assigned to, Internal Due Date, External Due Date, and Status. The table currently displays '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 interface. In the top right corner, the user's name "Research Compliance" is highlighted with a red box and labeled "A". Below this, a dropdown menu is visible, and the "My Profile" option is highlighted with a red box and labeled "B". The main content area shows "My Tasks" with filters and a search bar. The filters include "QUICK FILTERS" (Assigned to Me, Assigned to a Team, Created by Me), "STATUS" (Open, In Progress, On Hold, Closed), and "EXTERNAL DUE DATE" (<30 Days, Past Due). The search bar is labeled "Search for Task by ID, Title, Milestone ID, Assigned to or Created by". Below the search bar is a table with columns: ID, Title, Type, Milestone ID, Category, Progress, Assigned to, and Internal Due Date. The table currently displays "No results to display."

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

The screenshot shows the Cayuse My Profile page. On the left sidebar, the "COI Disclosures" option is highlighted with a red box. The main content area shows the "My Profile" section with fields for Name, First Name, Last Name, Prefix, Middle Name, and Suffix. The First Name field contains "Jenny" and the Last Name field contains "Davis".

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.

cayuse

My Profile

Products ▾ Research Compliance ▾

My Profile

My Profile [Research Compliance](#) COI Disclosures

+ New Disclosure

Name

Contact Info

Internal Associations

External Associations

User Account & Roles

Trainings & Certifications

Documents

COI Disclosures

Q Click to search...

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.

The screenshot displays the CBAUSE Outside Interests web application. On the left, a sidebar (A) lists sections: FCOI Policy & Training (with a green checkmark), Remuneration (1), Equity Interests (1), Venture Capital (1), Travel (1), Intellectual Property (1), Fiduciary Roles (1), Malign Foreign Talent Recruitment Program (1), and Certification (3). The main content area is titled 'FCOI Policy & Training' and contains information about MSU Operating Policy 70.09 and definitions for Significant Financial Interest and Institutional Responsibilities. At the bottom, there is an 'Acknowledgment' section (B) with a checked checkbox stating 'I acknowledge the FCOI disclosure and training requirements set forth in OP 70.09.' In the top right corner of the main content area, there are 'Previous' and 'Next' buttons (C), with the 'Next' button highlighted by a red box.

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 'Outside Interests' form, specifically the 'Remuneration' section. On the left, a sidebar lists sections: FCOI Policy & Training, Remuneration (highlighted with a 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 main content area is titled 'Remuneration' and includes a 'Definitions' section. The primary question is: '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?'. Below the question, it states 'You DO NOT need to disclose the following:' followed by a list of exclusions. At the bottom of this section, there are two radio buttons: 'Yes' (selected with a red box) and 'No'. A 'Next' button is visible in the top right corner of the section. A footer note says: '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.'

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

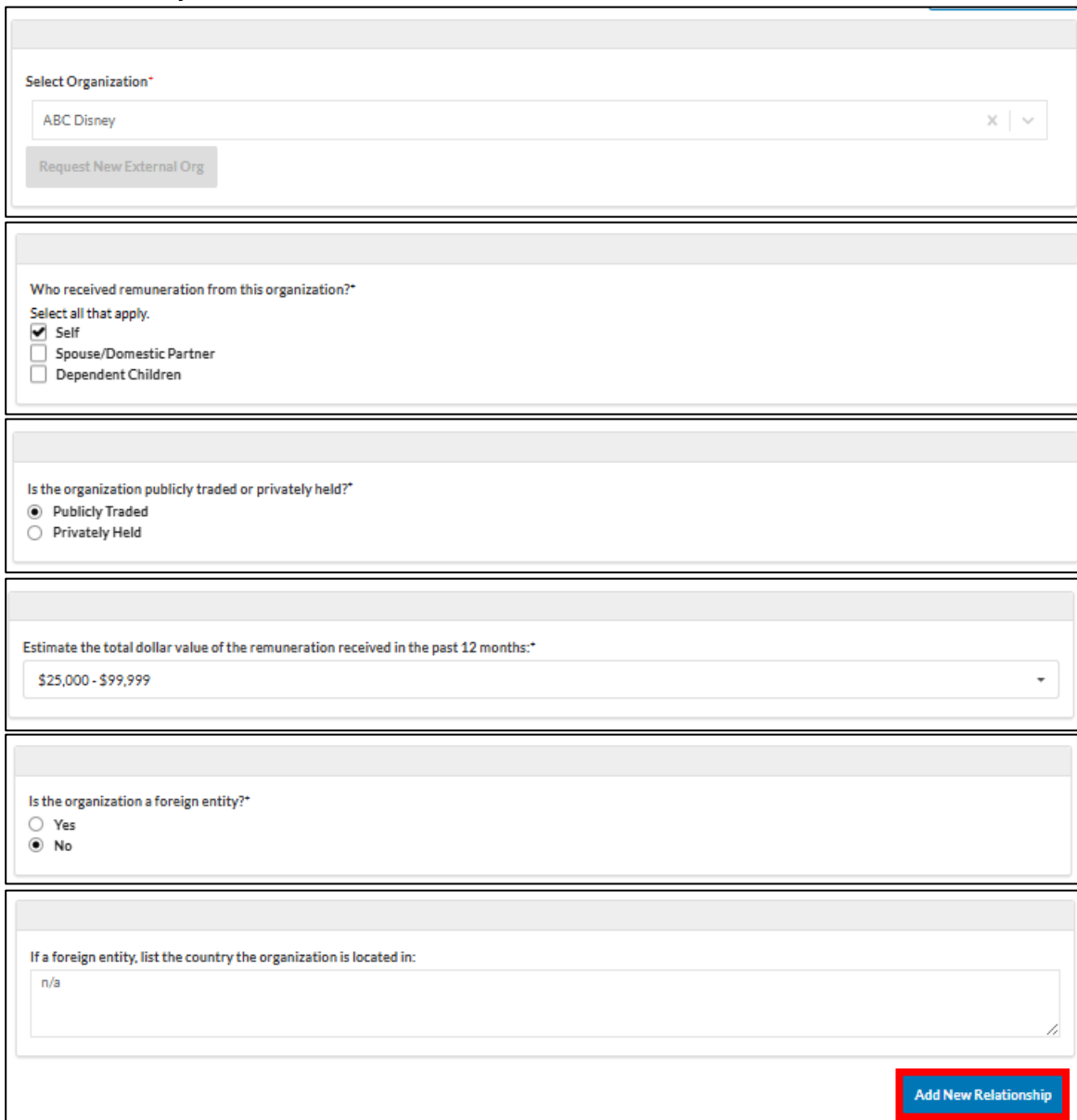
The screenshot shows a form titled 'Identify the organization(s) that you or an immediate family member received remuneration related to your Institutional Responsibilities. Then, answer associated questions.' Below the title, there is a text input field containing 'No entries.' and a red error message 'Field must not be empty'. At the bottom right of the form, there is a blue button with the text 'Add New Relationship' highlighted by a red box.

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.)



This screenshot shows the 'Select Organization' dropdown menu. The text 'Select Organization*' is at the top. Below it is a search bar with a vertical cursor. A red rectangle highlights the 'Request New External Org' link located below the search bar. A red error message 'Field must not be empty' is visible at the bottom left of the dropdown area.

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.





This block contains six sequential screenshots of the form:

- Screenshot 1:** The 'Select Organization' dropdown now shows 'ABC Disney' as the selected option. The 'Request New External Org' button is visible below the dropdown.
- Screenshot 2:** The question 'Who received remuneration from this organization?*' is shown. It includes the instruction 'Select all that apply.' and three checkboxes: 'Self' (checked), 'Spouse/Domestic Partner' (unchecked), and 'Dependent Children' (unchecked).
- Screenshot 3:** The question 'Is the organization publicly traded or privately held?*' is shown. It has two radio button options: 'Publicly Traded' (selected) and 'Privately Held' (unselected).
- Screenshot 4:** The question 'Estimate the total dollar value of the remuneration received in the past 12 months:*' is shown. The dropdown menu is set to '\$25,000 - \$99,999'.
- Screenshot 5:** The question 'Is the organization a foreign entity?*' is shown. It has two radio button options: 'Yes' (unselected) and 'No' (selected).
- Screenshot 6:** The question 'If a foreign entity, list the country the organization is located in:' is shown. The text 'n/a' is entered in the text box. A red rectangle highlights the 'Add New Relationship' button at the bottom right of the form.



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.

Is the remuneration disclosed above for consulting services that you provide?*



☒ Yes
☐ No

Select the statement(s) which best describes your consulting work.*

☐ My consulting work requires research.
☐ 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.
☐ 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.
☐ My consulting work does not fit into any of the categories listed above.

Field must not be empty

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.


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.

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.

*

Field must not be empty

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.



cayuse

Outside Interests

Products

Research Compliance

Profile

[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

Remuneration

Previous

Next

Definitions

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.

Remuneration

- salary and any payment for services not otherwise identified as MSU salary (e.g., consulting fees, honoraria, paid authorship).

8. 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.
9. The final section is the Certification section, 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.

The screenshot shows the 'Cayuse Outside Interests' web application. The top navigation bar includes 'Products' and 'Research Compliance'. The breadcrumb trail reads: 'Profile / Research Compliance / COI Disclosures / Disclosure Form'. In the top right corner, there are 'Print to PDF' and 'Submit' buttons, with the 'Submit' button highlighted with a red box. A sidebar on the left lists the sections of the form, each with a green checkmark: FCOI Policy & Training, Remuneration, Equity Interests, Venture Capital, Travel, Intellectual Property, Fiduciary Roles, Malign Foreign Talent Recruitment Program, and Certification. The main content area is titled 'Certification' and includes a 'Previous' button and a 'Next' button. The 'Next' button is highlighted with a red box. The 'Certification' section contains three main areas: 'Acknowledgement*' with a list of five statements and a checked checkbox 'I acknowledge and agree to the statements above.'; 'Certification*' with a checked checkbox 'I certify to the best of my knowledge and belief that the information contained in this Disclosure form is true, complete and accurate...'; and a text input field for 'Enter your MSU netID:' with the value 'msu123' entered. Below this is a section for 'Attach any relevant documents, if applicable.' with a dashed box and a link to 'Drag and drop new files or click to select from file system...'.

10. 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.

The screenshot shows a 'Routing Confirmation' dialog box. It has a dark background with a white paper plane icon. The text reads: 'Are you sure you want to submit your disclosure?'. At the bottom, there are two buttons: 'Cancel' and 'Proceed', with the 'Proceed' button highlighted with a red box. The background of the dialog box shows a blurred view of the 'Acknowledgement' section from the previous screenshot.

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

What does the resolution status of my disclosure mean?

After your disclosure is reviewed by ORC&S, it will be assigned a resolution status. Each disclosure falls into one of the following three categories:

- **COI determined and managed** - means that you reported a Significant Financial Interest (SFI) on your disclosure form. After review, ORC&S determined that a potential or real conflict exists but can be appropriately managed through an approved management plan.
- **COI determined and unmanageable** - means that you reported an SFI on your disclosure form. After review, ORC&S determined that the potential conflict cannot be managed at this time. Additional review, restrictions, or institutional action may be required before the related research activity can proceed.
- **No COI determined** - means that you either reported no SFIs on your disclosure form, or that any of the SFIs disclosed were reviewed and determined not to constitute a conflict of interest based on the information available at the time of review.

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.