



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

About the Research Based Disclosure

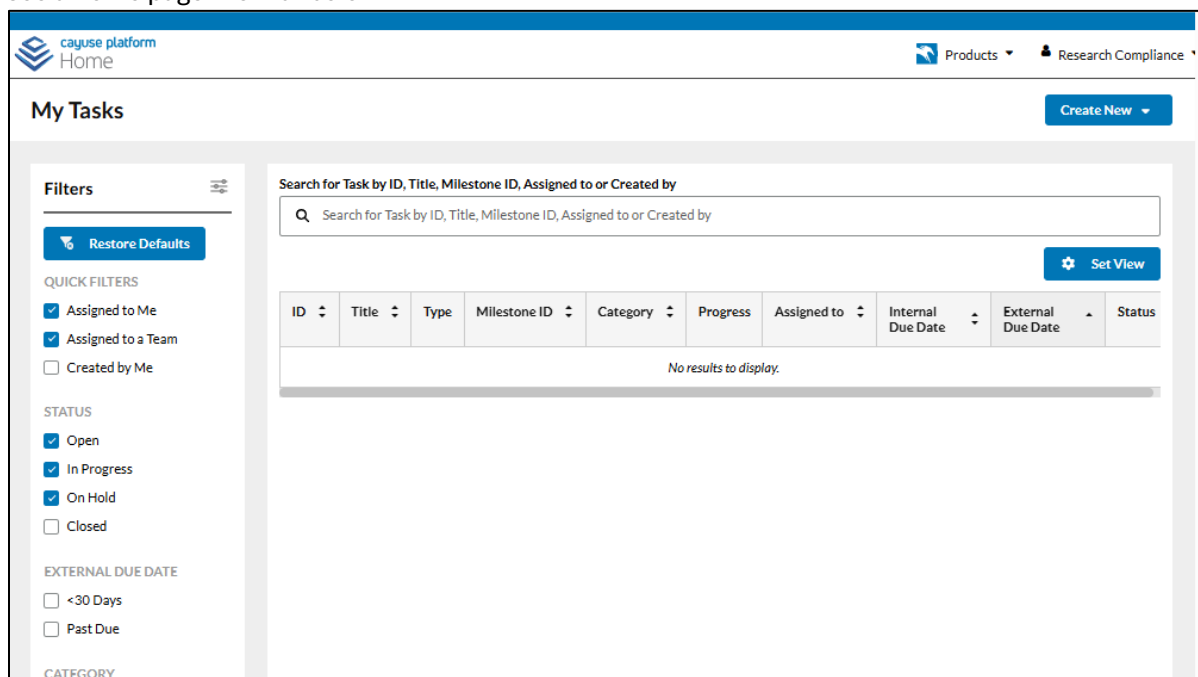
A Research Based Disclosure (RBD) is a Cayuse system-generated form that is tied to a specific project and is required for every proposal and for every award at both the proposal review stage and the award review stage. An RBD is not a one-time or annual form and cannot be reused from a prior project.

When a PI/department is ready to begin the university proposal review process, their Office of Sponsored Projects (OSP) Administrator selects the “Route for Review” button in the Cayuse Proposal form. This action automatically triggers Cayuse to generate a new RBD for that proposal and send an email to all individuals listed as key personnel on the project, notifying them that an RBD is required. The email includes a direct link to access the RBD for that specific proposal. All key personnel must have their RBD for the proposal completed and approved by ORC&S before the proposal can be submitted to the sponsor.

The process repeats the award review stage. When the OSP Administrator clicks the “Route for Review” button in the Cayuse Award form, Cayuse generates a new RBD for the award for all key personnel on the project and sends them an email with a direct link to access their RBD. Even if an RBD was recently completed for the proposal, a separate RBD is required for the award. All key personnel must have their RBD for the award completed and approved by ORC&S before the award can be fully set up.

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.



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

The screenshot shows the 'My Tasks' page in the Cayuse platform. The top right corner features a user profile dropdown menu. The menu is open, showing the user's email (compliance@research.msstate.e), institution (Mississippi State University), and time zone (US/Central). The 'My Profile' option is highlighted with a red box, labeled 'B'. The 'Research Compliance' dropdown is also highlighted with a red box, labeled 'A'. The main content area shows a search bar and 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 'My Profile' page in the Cayuse platform. The left sidebar contains a list of navigation options: Name, Contact Info, Internal Associations, External Associations, User Account & Roles, Trainings & Certifications, Documents, and COI Disclosures. The 'COI Disclosures' option is highlighted with a red box. The main content area shows a form for updating profile information, including fields for First Name (Jenny), Last Name (Davis), Prefix, Middle Name, and Suffix.

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 'My Profile' dashboard for 'Research Compliance' with a focus on 'COI Disclosures'. A sidebar on the left lists various profile sections, with 'COI Disclosures' selected. The main content area features a search bar and a table of disclosures. The table has columns for 'Disclosure Name', 'Status', and 'Submission Date'. Two rows are visible: one for 'Annual - 2024' (Status: Disclosure Complete, Date: 12/12/2025 11:44 AM) and one for 'Proposal 25-0031-P0001: New Title- Testing Annual...' (Status: Unsubmitted). The second row is highlighted with a red 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.

The screenshot displays the 'Outside Interests' web application interface. 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 Progra. (1), and Certification (3). The main content area (B) is titled 'FCOI Policy & Training' and contains the 'MSU Operating Policy 70.09' section, which includes a link to the policy and a note about FCOI training requirements. Below this is the 'Definitions' section, which defines 'Significant Financial Interest (SFI)' and 'Institutional Responsibilities'. At the bottom of the main content area, there is an 'Acknowledgment*' section with a checked checkbox: '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 is a 'Next' button (C) highlighted in red, along with a 'Previous' button. The top of the page shows the 'Outside Interests' logo and navigation links for 'Products' and 'Research Compliance'. A 'Print to PDF' button and a 'Submit' button are also visible in the top right corner.

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 a web form. On the left is a sidebar with a list of sections: FCOI Policy & Training (checked), Remuneration (1), Equity Interests (1), Venture Capital (1), Travel (1), Intellectual Property (1), Fiduciary Roles (1), Malign Foreign Talent Recruitment Programs (1), and Certification (3). The main content area is titled 'Remuneration' and includes 'Definitions' for 'Institutional Responsibilities' and 'Remuneration'. 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 is a list of items that do not need to be disclosed. At the bottom of the question area, the 'Yes' radio button is selected and highlighted with a red box. A 'Next' button is visible in the top right corner of the section.

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

This screenshot shows a text input field with the placeholder text 'No entries.' and a red error message below it that reads 'Field must not be empty'. In the bottom right corner of the form area, the 'Add New Relationship' button is highlighted with 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.)



The screenshot shows a web form with a dropdown menu labeled "Select Organization*". The dropdown is currently empty, and a red box highlights the "Request New External Org" option at the bottom of the menu. Below the dropdown, there is a red error message that says "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.



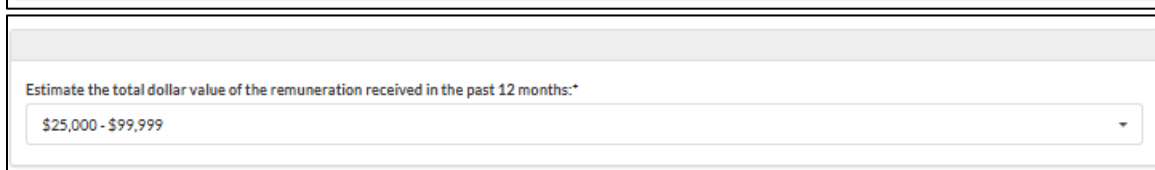
The screenshot shows the "Select Organization*" dropdown menu with "ABC Disney" selected. Below the dropdown, there is a button labeled "Request New External Org".




The screenshot shows a question: "Who received remuneration from this organization?*" with the instruction "Select all that apply." Below the question are three checkboxes: "Self" (checked), "Spouse/Domestic Partner" (unchecked), and "Dependent Children" (unchecked).




The screenshot shows a question: "Is the organization publicly traded or privately held?*" with two radio buttons: "Publicly Traded" (selected) and "Privately Held" (unselected).



The screenshot shows a question: "Estimate the total dollar value of the remuneration received in the past 12 months:*" with a dropdown menu showing "\$25,000 - \$99,999".



The screenshot shows a question: "Is the organization a foreign entity?*" with two radio buttons: "Yes" (unselected) and "No" (selected).



The screenshot shows a question: "If a foreign entity, list the country the organization is located in:" with a text input field containing "n/a". A red box 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.

cajuse
Outside Interests

Products Research Compliance

Profile
Profile / Research Compliance / COI Disclosures / Disclosure Form

Print to PDF Submit

All Changes Save Automatically

Sections	Remuneration
FCOI Policy & Training	<input checked="" type="checkbox"/>
Remuneration	<input checked="" type="checkbox"/>
Equity Interests	<input type="checkbox"/>
Venture Capital	<input type="checkbox"/>
Travel	<input type="checkbox"/>
Intellectual Property	<input type="checkbox"/>
Fiduciary Roles	<input type="checkbox"/>

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).

Previous **Next**

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.

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.

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.