



# Oklahoma State University

## Conflict of Interest

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OneAegis Web-Based COI Management Plan Instructions

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## Who needs to submit a Conflict of Interest (COI) Management Plan

A conflict-of-Interest Management Plan is a written plan for proactively managing actual, potential or perceived conflicts of interest with both conflicts-of-interest or conflicts-of-commitment.

All researchers who have submitted a conflict-of-interest disclosure in which it is determined that there is a possible or actual conflict will be notified and required to complete and submit a management plan.




## Why are you doing it?



A management plan demonstrates the researcher's intent to comply with University requirements under State and Federal regulations and laws related to objectivity in research and commitment to their research obligations.

## When do you need to fill out a COI Management Plan?

After a COI Disclosure has been submitted and reviewed by the COI Office, you'll receive the following email indicating that you need to submit a Management Plan.

Management Plan needed for COI Disclosure

 COI Office <no-reply@okstate.oneaegis.com>  
To:  Gina Cosden  
Cc:  COI Office

[Reply](#) [Reply All](#) [Forward](#)  

Thu 4/4/2024 9:54 AM

Dear Gina Cosden,

Thank you for submitting your Conflict Of Interest (COI) disclosure to the Oklahoma State University Conflict of Interest Office. Your disclosure has been reviewed and a Management Plan is required. Please click the following link to start and submit a management plan for this disclosure.

<https://okstate.oneaegis.com/xForms/StartForm.ashx?Form=b509580e-a007-4293-a202-b3200cba525c&FormOwner=633fc686-21a0-4c66-a710-2d69ed3ed2b4&StartedFromInstance=43758690-389d-47f5-986b-309ee998f624>

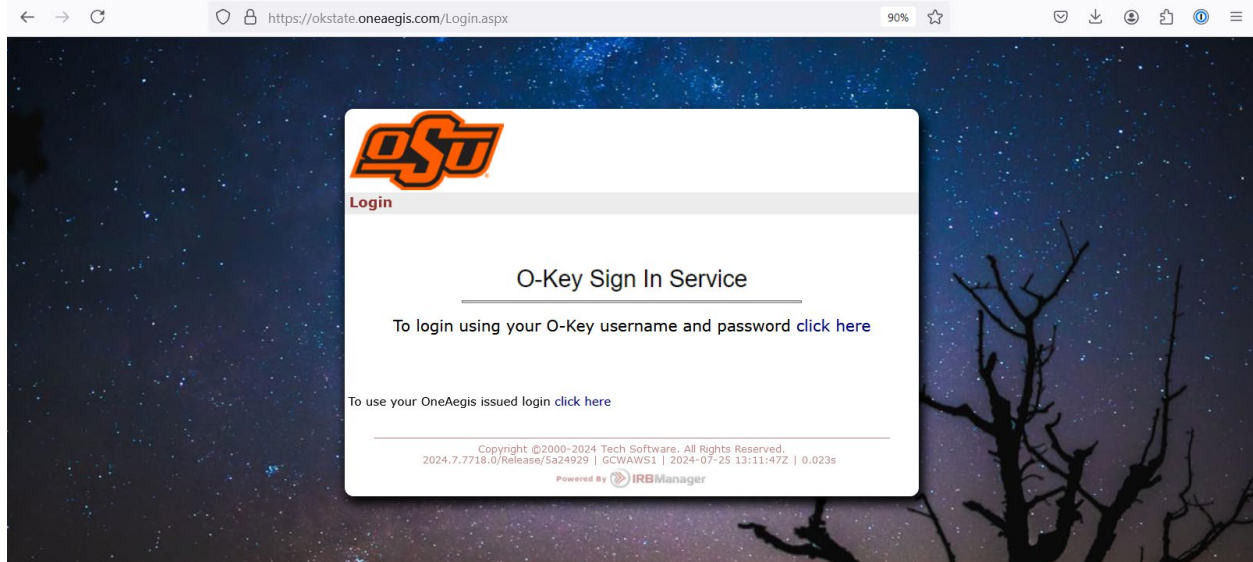
[COI Management Plan Form](#)

Thank you.

Click the link on the email, to be taken to the Management Plan Form. All Management Plans are started by clicking on the link provided to you in the email. If you think you need to submit a Management Plan and haven't received an email or the email is no longer available, please contact the COI Office and request a copy of the email. It will be resent to you.

(You'll need to log in to OneAegis, if you aren't already logged in)

## Login screen



## Top part of MP

COI Mgmt Plan Header Page 1 of 4 Next

COI Management Plan Form -- COI Mgmt Plan Header

**Form Creator** Add Note View Audit

Cosden, Gina  
Email: [gina.cosden@okstate.edu](mailto:gina.cosden@okstate.edu) Phone:

**CITI Conflict of Interest Training**  
05/21/2028  
Department (Required)  
Department Head (Required)

**Please choose which types of commitment you are managing** (Required) Add Note View Audit

- Conflict of Commitment
- Manage Use of University Resources
- Manage Conflicts with Related Research Programs
- Manage Conflicts with Related Human Subjects Programs
- Manage COI that may affect Students, Trainees, and other OSU Employees
- Manage Intellectual Property
- Manage Research Engagement with Conflicted Entity
- Manage University Procurement of Services or Product from Conflicted Entity
- Manage Conflicts with non-US Based Entities or Institutions
- Reduce or Eliminate the Conflict of Commitment or Interest

Once loaded, the Management Plan will have your name as the Form Creator. It will also list the CITI Conflict of Interest (COI), Responsible Conduct of Research (RCR) and Undue Foreign Influence: Risks and Mitigations (UFI) Training dates for you. If these training courses are not up to date, please ensure that you take the training as soon as possible as it will be a required part of your Management Plan.

Please choose the appropriate department and department head and then pick the appropriate types of commitment you are managing. The types of commitment will be based upon the conflicts indicated in your COI Disclosure Form. If you do not choose all the appropriate types of commitment being managed, your form will be returned to you before processing.

Click the 'Next' button on the bottom of the screen and then follow the directions and answer the questions on each subsequent screen to detail how the individual conflicts will be managed.

**Intellectual Property:** [Add Note](#)

The following, whether or not protectable under current or future intellectual property laws: inventions, discoveries, scientific or technological developments, improvements, trade secrets, know-how, Computer Software, and other copyrightable works, any patent, copyright, mask work (ICM) or other property right pertaining to the foregoing, and trademarks and service marks directly related to any other Intellectual Property covered by OSU Policy 1-0202.

[Link to OSU Policy - OSU IP Policy 1-0202](#)

**Method to Manage Intellectual Property** (Required) [Add Note](#) [View Audit](#)

Please select all that apply. Choose OTHER if you have a unique method to manage conflict with Intellectual Property

- A) Intellectual Property conceived, created, or developed by the Covered Individual in the course of or resulting from permissible outside professional activities shall be the property of the University if such activities are deemed to be a direct result of such Covered Individuals employment, appointment, or association with the University or are performed on University time or with more than incidental use of University resources. The Covered Individual will disclose to the OSU Office of Technology Commercialization (OTC) all such intellectual property and provide the OTC with sufficient information to allow the University to determine whether there is/has proprietary interest in such Intellectual Property.
- B) The Covered Individual will recuse themselves from all negotiations between the conflicted entity and the University, for the licensing and/or options of University Intellectual Property, on behalf of the University.
- C) The Covered Individual will not use funding or other University resources to support the conflicted company unless written arrangements are made with the University. A copy of the

Continue answering questions on each subsequent page until you reach the Submission Instruction screen. You will be required to agree and sign the Management Plan after review and acceptance by the COI Committee.

**Submission Instructions** [Add Note](#)

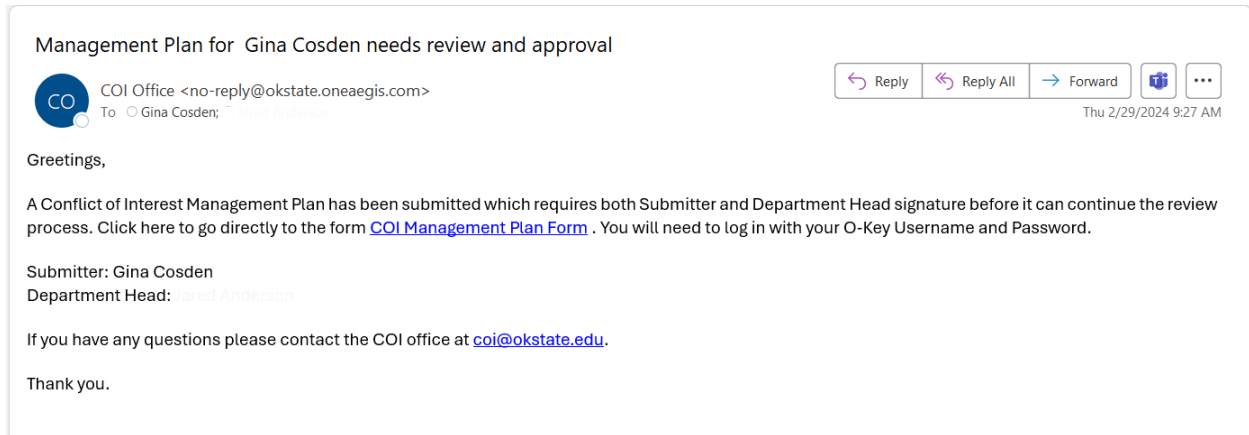
Please click 'Next' and then 'Submit'. After submission this form will be routed to the COI office for pre-review. After pre-review, the form will be returned to you for modifications or signature and then routed to your department head for review and signature and then on to the COI Committee.

[Previous](#) [Next](#) [Save for Later](#) [More](#)

Click 'Next' and then 'Submit' when you are ready to submit the Management Plan for committee review.

If there are changes being requested from the Office Pre-Review, you'll receive an email indicating what changes are needed and a link to the form. Click the link, make the indicated changes and resubmit for review.

Once the Management Plan has been pre-reviewed by the COI Office, the submitter and Department Head will receive a request to review and sign-off on the Management Plan before it can move forward for committee review.



Click the link on the form and review the entire form. Click the 'Next' button and then click the 'Sign' button next to your name. Enter your OK State credentials to sign the form.

After both the discloser and the department head have reviewed and signed the form, the Management Plan will move to the COI Committee for review.

## Post Review

Following the COI Committee Meeting, the Management Plan will receive one of the following determinations:

### Approve

An approved Management Plan will have the date of the committee approval and the committee members reviewing the plan added to the plan. Then the plan will be stamped and turned into a PDF and emailed to the discloser and the department head for their records. The Management Plan will be stored in the system for reference.

### Request Directed Revisions

If the COI Committee has requested directed revisions the discloser will receive an email listing the changes requested by the committee and a link to edit the form which has been returned to a stage allowing change. Make the requested changes and resubmit. Once all the changes have been accepted, the COI Office will review, request updated signatures from both the discloser and the department head and then follow the Approve Process from above.

## **Request Clarifications**

If a Management Plan determination from the Committee is requesting clarifications, the discloser will receive an email with instructions detailing the Management Plan sections which require additional clarification. The form will be moved to a stage allowing the plan to be edited. Once the clarifications have been made by the discloser, the form can be resubmitted to the COI Office. Once all clarifications have been met, the form will be sent to the discloser and department head for updated signatures and then back to the COI Committee for review. A new determination will be made, and the form will follow the appropriate post determination steps.