

When disclosing:

- Read this Disclosure & COI Training Page, then click the checkbox at the bottom of the page to confirm that you’ve read it.
- On the Disclosure Details Page:
 - 1) answer the introductory questions,
 - 2) edit, update, and/or archive previous disclosures as needed,
 - 3) add new outside activities, relationships, and interests.
- On the Attestation Page, attest and submit your disclosure in three steps:
 - 1) click the Attestation checkbox in the middle of the page,
 - 2) select “Yes” to indicate you’re ready to submit the disclosure, and
 - 3) click “Save” or “Finish” to submit.
- For additional information, see [this video demonstration](#).

Disclosure & COI Training

The University of Michigan allows and encourages outside activities, relationships, and interests with companies and organizations external to the University that enhance the missions of the University ([Regents Bylaw 5.12](#) and [U-M Faculty Handbook section 9.E](#)).

Why must I disclose outside activities, relationships, and interests?

Disclosing your [outside activities, relationships, or interests](#) (henceforth referred to as “outside activities”) in M-Inform helps ensure the transparency and integrity in your U-M research and professional work.

Disclosure of outside activities is also an institutional requirement under U-M policy ([SPG 201.65.1](#)) and [unit policy](#). For **U-M researchers**, it’s also required by the Office of the Vice President for Research, the State of Michigan, and federal agencies for sponsored research funding ([COI Policies](#)).

Unreported outside activities may impact both you and U-M by:

- Introducing bias, or the appearance of bias, into your research
- Increasing the possibility that the results of the research will be questioned
- Jeopardizing the ability to conduct research through the suspension/termination of existing projects and/or through the reduction/loss of future funding opportunities
- Damaging reputations (professional and/or organizational)

Represents M-Inform as 07/01/2025. Document last updated 09/15/2025.

By disclosing outside activities in M-Inform, you assist in safeguarding research and demonstrate compliance with U-M and sponsor requirements.

What outside activities, relationships, and interests do I need to disclose?

Report all paid and unpaid outside activities, relationships, interests, and intellectual property for you, your spouse, domestic partner, and/or dependent children (i.e., family members) with an [outside entity/organization](#) (including foreign institutions, governments, and companies) when:

- The outside activity relies on or utilizes the same expertise as your U-M teaching, research, clinical, and public service responsibilities; **OR**
- The outside activity is similar to your area of expertise, scholarship, employment; **OR**
- The outside activity has the potential to influence your U-M duties; **OR**
- The outside entity [conducts business with U-M](#).

Even if your U-M appointment is less than full-time or less than 12 months (including temporarily reduced appointments), or if the activity took place during a sabbatical, leave, or U-Year summer months, you are required to report all applicable activities outside your U-M appointment.

Note: Activities routed through U-M (such as sponsored research projects) or conducted as part of your U-M role do not need to be disclosed.

Disclose

[Printable Version](#). The following are examples of outside activities that must be disclosed on the Disclosure Details page.

OWNERSHIP INTEREST (EQUITY, STOCK, STOCK OPTIONS)	PAYMENTS/LOANS/REIMBURSEMENTS
<ul style="list-style-type: none">• Ownership (e.g., stock, stock options, LLCs, etc.) in a company (including start-up companies) related to your U-M role/responsibilities• Ownership of a publicly-traded company that is related to your U-M responsibilities or research, or that conducts business with the U-M (e.g., purchases, sponsoring research, contracts, etc.)	<ul style="list-style-type: none">• Payments from professional societies for services• Loans and loan repayment• Travel expenses reimbursed directly to you of \$5,000 or more, in aggregate, by a single domestic outside entity in a 12-month period• Gifts from outside entities• Venture or other capital financing

INTERNATIONAL ENGAGEMENT <ul style="list-style-type: none"> Appointment, employment, or visiting scholar at a non-US entity (e.g., teaching a class/course, role at start-up, directing a program, lab work, or other services typical for an employee or professor) Participation in a foreign talent recruitment (or similar) program or support provided by the program through an intermediary Consulting and/or advising for a non-US entity Travel paid or reimbursed by a non-US entity including academic and healthcare institutions, governments, companies, or non-profits (any dollar amount) Research support from or research engagement with a non-US entity that did not route through U-M Grant reviewer or other advisory services for non-US institutions, organizations, and entities In kind resources (e.g., lab, office, equipment, materials, reagents, personnel, etc.) that you have access to outside of your U-M role provided by a non-US entity Venture or other capital financing Non-US professional society participation (e.g., membership, leadership, travel, etc.) 	ACTIVITIES/RELATIONSHIPS (PAID AND UNPAID) <ul style="list-style-type: none"> Consulting Advisory role (e.g., scientific advisory board, data and safety monitoring board) Board of Directors, Corporate Officer, Trustee, or other position with fiduciary responsibility Leadership role in a professional society Appointment, employment, or visiting scholar at a domestic or non-US entity (e.g., teaching a class/course, role at start-up, directing a program, lab work, or other services typical for an employee or professor) Speaking engagements (except as noted in the Do Not Disclose examples below) In-kind resources (e.g., lab, office, equipment, materials, reagents, personnel, etc.) that you have access to outside of your U-M role.
INTELLECTUAL PROPERTY (IP) <ul style="list-style-type: none"> Optioned or licensed IP whether developed at U-M or outside U-M Software apps marketed by a company Open source IP (e.g. software) Royalties, milestones, option fees 	ADDITIONAL ROLES <ul style="list-style-type: none"> Research at an outside entity (that is not part of your U-M research) Editor of journals or other publications not routed through U-M Expert witness or other legal service Grant reviewer (except as noted in the Do Not Disclose examples below)

Do Not Disclose (exemption examples)

<p>ACTIVITIES/RELATIONSHIPS</p> <ul style="list-style-type: none"> Speaking engagement and/or travel (paid or unpaid) that is: <ul style="list-style-type: none"> Supported by a U.S. federal, state, or local government agency Supported by a U.S. academic institution that is public or non-profit and accredited <ul style="list-style-type: none"> Or said academic institution's affiliated hospital, medical center, or research center U.S. professional society <ul style="list-style-type: none"> Membership Service that is not paid nor involves paid travel Speaking at or travel to national annual meetings, forums, congresses (under \$5,000 in a 12-month period from a single entity*) Activities or relationships that are not related to your U-M expertise Reviewer of books or journal articles Grant reviewer for U.S. governmental agencies (any dollar amount) or U.S. non-profit entities (under \$5,000 in a 12-month period from a single entity*) 	<p>PAYMENTS/GRANTS/CONTRACTS</p> <ul style="list-style-type: none"> Payments for service as a U.S. federal, state, or local government agency grant/study section reviewer Effort (paid or unpaid) on a research or sponsored project routed through U-M (e.g., sponsored research, other sponsored activities, UM-funded research, U-M unfunded agreements, or other payments to U-M resulting from a U-M contract Domestic travel (under \$5,000 in a 12-month period from a single entity*) Travel paid by U-M or yourself Gifts made/to processed by U-M Student and personal (e.g., mortgage, private, etc.) loans
<p>INTERNATIONAL ENGAGEMENT</p> <ul style="list-style-type: none"> Visitors/trainees working in your U-M lab Financial support from a non-US entity received by visitors/trainees in your lab Collaborations with non-US persons on activities or research within your U-M role (including NIH Foreign Components) In-kind support you provide to someone at a non-US entity <p>Although you are not required to disclose these activities in M-Inform, you may be required to report them in Current & Pending (Other) Support documentation to funding agencies (e.g., NSF, NIH, DOE, DOD, NASA etc.).</p>	<p>OWNERSHIP INTEREST</p> <ul style="list-style-type: none"> Mutual funds, retirement funds, and similar investments where you do not control the investment decisions within the portfolios at the level of specific companies Ownership (e.g., stock, stock options) of a publicly-traded company that is not related to your U-M responsibilities or research, and does not conduct business with the U-M (e.g., purchases, sponsoring research, contracts, etc.

INTELLECTUAL PROPERTY (IP) <ul style="list-style-type: none">• Inventions/IP that have not been optioned, licensed, or reassigned even if there is a patent• Software apps that are not marketed or sold• Book Royalties	
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* Keep in mind that if you travel, speak, and/or perform grant reviews for a single domestic entity multiple times over the course of any rolling 12-month period, the \$5,000 threshold may be exceeded and such activities will need to be reported. Travel, speaking, and/or performing grant reviews for a **foreign entity** should be disclosed, regardless of dollar amount.

How often do I have to disclose and complete this training?
You must disclose at least annually at the start of the University’s fiscal year (July 1) and within 30 days of a new outside activity or change to a previously reported activity (e.g., the number of days spent on an activity, the aggregated value, specific roles, etc.). You must complete this training annually as part of the disclosure requirement.

What happens with my disclosure?
Your unit will review your disclosure for compliance with U-M and unit policies, [conflicts of commitment](#) (COC) (time/effort), and certain conflicts of interest (COI) with your professional duties. Even if you have previously obtained approval from your unit for outside activities, they must be disclosed in M-Inform.

Note: If your outside activities exceed the number of days allowed under U-M policy, you must work with your unit and/or faculty affairs to adjust your U-M effort/appointment to accommodate these outside activities.

A U-M COI Office may also review your disclosures to determine if [conflicts of interest \(COI\)](#) exist between your outside activity and your U-M research, sponsored projects, or intellectual property. If a COC or COI exists, a management plan may be established by a U-M COI Office and/or your unit. A U-M COI Office may also review your disclosures for inclusion in documentation required by federal sponsors.

Will my disclosure be private?
Disclosure information is subject to release outside the U-M under the State of Michigan Freedom of Information Act (FOIA) and certain funding agency requirements. Disclosure information may be shared within the U-M, as appropriate.

Who can I contact if I have questions?
Email: COI.Support@umich.edu

- Where can I get more information?**
- [M-Inform instructions](#)
 - [General COI website and process information](#)
 - [COI Policies](#) (including federal sponsors such as PHS/NIH, NSF, DOE, NASA)
 - [NIH FCOI Training](#)

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Training Acknowledgement:

☐ I certify that I have read the training above and understand that it is my responsibility to fully disclose my outside activities, relationships, and interests in accordance with U-M, federal, and other funding sponsors COI policies.

Disclosure Details for Jane Discloser

Organizational Conflict of Interest Disclosure (in the past five years)

* 1. Excluding service on proposal review panels, in the past five years, have you provided consulting or advisory services to any U.S. federal agency where you had access to confidential or proprietary technical information?

☐ Yes ☐ No [Clear](#)

Please list the agency, the program you consulted or advised on, and describe the service you provided (note: if this happened within the past 12 months, this must be disclosed as an individual outside activity below):

U-M Family Member

* 2. Do you have a spouse, domestic partner, and/or dependent children (i.e., family member) currently employed at U-M?

☐ Yes ☐ No [Clear](#)

Enter your family member below using their unqiusername or by last name.

If you are unable to find your family member, use the Create New User button in the "User Not Found" help box below to create their M-Inform account. Once the M-Inform account has been created, enter your family member below.

Name	Uniqname	Primary Appointing Department
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There are no items to display

User not found?

Try the following:

Search on Last Name

Verify exact unqiusername

Still not found?

Create New User

Individual Outside Activity Disclosure

* 3. Do you or your [family members](#) have any paid or unpaid [outside activities, relationships, interests,](#) or [intellectual property](#) (current or in the past 12 months) with an [outside entity/organization](#), foreign or domestic, that:

- Rely on or utilize the same expertise as your U-M teaching, research, clinical, and public service responsibilities; **OR**
- Are similar to your area of scholarship or employment; **OR**
- Have the potential to influence your U-M duties; **OR**
- Are with outside entities that [conduct business with U-M](#).

OR

Have you been instructed to disclose an outside activity by a U-M school, department, or central office (e.g., a COI Office, IRB)?

☐ Yes ☐ No [Clear](#)

* 3.1 Do you have any active federally funded (e.g., NIH, NSF, DOE, NASA, DOD, etc.) awards (direct or prime funding) **OR** have you submitted or do you plan to submit a proposal for federal funding for your U-M research during the current fiscal year (July 1 - June 30)?

☐ Yes ☐ No [Clear](#)

Note: You will need to upload all contracts, grants, appointment/acknowledgement letters, statements of work, and any other agreements related to your outside activities with a non-US entity. This documentation must address the level of designated commitment, effort, and compensation.

* 4. Do you have an [Open Researcher and Contributor ID \(ORCID\)](#)?

☐ Yes ☐ No ☐ Unsure [Clear](#)

* 4.1 Enter your ORCID Number(s).

+ Add

Reported Outside Activities, Relationships, or Interests

Add Outside Activity, Relationship, Interest

Select the outside entity/organization involved in this activity, relationship, or interest:

...

If you are unable to find the outside entity/organization, please enter the legal name of the outside entity/organization:

OK

Cancel

Pending

View/Edit	Organization	Relationship	Role	Start Date	End Date	Ongoing?	Days	Total Value	Last Updated	Archive
<div>Edit</div>	Pfizer	<ul style="list-style-type: none">Consultant		03/10/2018		Yes	4	\$20,000 - \$30,000	07/07/2024	<div></div>

Reviewed

Modify	View	Organization	Relationship	Role	Start Date	End Date	Ongoing?	Days	Total Value	Last Updated	Archive
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There are no items to display

Archived

Restore	View	Organization	Relationship	Role	Start Date	End Date	Ongoing?	Days	Total Value	Last Updated
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There are no items to display

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Disclosure of [Company Name] for Jane Discloser

* 1. To the best of your knowledge, is this a non-US entity (e.g., an institution, government, or company located outside the U.S.)?

☐ Yes ☐ No [Clear](#)

* 1.1. In what country is this entity located?

* 1.2 Does the work you perform for this entity take place outside the U.S?

☐ Yes ☐ No [Clear](#)

* 1.3. Upload all contracts, grants, appointment/acknowledgement letters, statements of work, and any other agreements related to your outside activities with this non-US entity (original and English translations). This documentation must address the level of designated commitment, effort, and compensation.

+ Add

* 2. Select the choice that best describes this outside entity:


- ☐ Publicly Traded Company
- ☐ Non-Publicly Traded Company
- ☐ Governmental Agency
- ☐ Academic Institution
- ☐ Non-Profit Organization
- ☐ Other

[Clear](#)

* 3. Select who this outside activity, relationship, or interest is for:

- ☐ Self
- ☐ Family Member (spouse/domestic partner or dependent)
- ☐ Both (self and family member)


* 4. Provide the [start/initial](#) date for the outside activity, relationship, or interest:



* 5. Is this outside activity, relationship, or interest ongoing?

- ☐ Yes
- ☐ No
- [Clear](#)

* 5.1 Please enter the end date



* 6. Estimated [professional effort](#) (in days) engaged in this activity, relationship, or interest for the current fiscal year (ending June 30). (If you are only disclosing an outside activity for your spouse or dependent, enter 0 days for professional effort.) This effort needs to reflect any written agreements you have for this outside activity.

* 7. Provide details about this outside activity, relationship, interest, and/or intellectual property. Check ALL that apply below. (For assistance, review the [Outside Activity Disclosure Guidance](#).

Note: If you participate in federally sponsored research, certain active engagements may also need to be included in your documentation to federal sponsors (e.g., Current and Pending (Other) Support, Biographical Sketch). Please see the requirements table available at [NSPM-33 Implementation Guidance](#) and contact other.support.reporting@umich.edu with any questions.

- ☐ Appointment (e.g., adjunct, honorary, directorship) or visiting scholar arrangement

* Select all that apply:

- ☐ Adjunct
- ☐ Honorary



- ☐ Director
- ☐ Visiting Appointment (e.g., scholar, professor, instructor, researcher)
- ☐ Other (e.g., invited guest)

* Is there a written agreement?

☐ Yes ☐ No [Clear](#)

* Provide the title and describe the expectations of your role:

* Percent FTE/effort

- ☐ In-kind resources (e.g., lab, office, equipment, materials, reagents, personnel, etc.) provided by this entity that you have access to or are using **outside** of your [U-M role](#)

* Please describe:

- ☐ [Foreign government talent recruitment \(or similar\) program](#) involvement/support (whether provided directly or an intermediary)

* Was the contract with you directly?

☐ Yes ☐ No [Clear](#)

* Describe the expectations of your responsibilities:

☐ Travel (paid directly or reimbursed to you by the outside entity)

** Enter information about each trip on a separate line in the table. Click the Add button to enter trip details. To make changes, click the Update button next to the information to be changed.*

+ Add

Date	Duration	Destination (city, state, country)	Purpose	Event Organizer (if other than the outside organization)
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There are no items to display

☐ Intellectual Property – The outside entity owns or has optioned or licensed [Intellectual Property](#) (including software whether accessed by the company via an open source license or other route) that you and/or your family member invented/created and/or in which you would otherwise have an economic interest

** Is it U-M IP (if you are not sure, contact [Innovation Partnerships](#))?*

☐ Yes ☐ No [Clear](#)

** Are you using this intellectual property in your U-M research?*

☐ Yes ☐ No [Clear](#)

☐ Equity interest, ownership, stock, stock options, or partnership interest

☐ ** 5% or greater*

☐ Less than 5%

[Clear](#)


** Is the dollar value of the equity known?*

☐ Yes ☐ No [Clear](#)


☐ Employee

** Title*

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 Exit

 Save

Continue 



* Percent FTE/Effort

☐ Board of director (including non-profits) or leadership/management/fiduciary role (e.g., CEO, President, Vice President)

Select all that apply:

☐ Board of Directors

☐ Member

☐ Officer (e.g., secretary, treasurer, vice president, president, chair, etc.)

☐ CEO

☐ President

☐ Vice President

☐ Other

* Please describe:

☐ Consultant

* Is there a written agreement?

☐ Yes ☐ No [Clear](#)

* Does this consulting activity involve your participation in the design, conduct, or reporting of research?

☐ Yes ☐ No [Clear](#)

[If yes] Note: You must select *non-UM research* below for consulting activities that involve the design, conduct, or reporting of research. Any active research consulting activities must also be included in documentation to federal sponsors (e.g., Current and Pending (Other) Support). Please email other.support.reporting@umich.edu with any questions.

* Describe your consulting role:



☐ Advisor (including scientific, strategic, medical board membership)

* Describe your advisory role and responsibilities:

Name and purpose of the committee(s), if applicable:

* Does this advising activity involve your participation in the design, conduct, or reporting of research?

☐ Yes ☐ No [Clear](#)

[If yes] Note: You must select *non-UM research* below for advising activities that involve the design, conduct, or reporting of research. Any active research advising activities must also be included in documentation to federal sponsors (e.g., Current and Pending (Other) Support). Please email other.support.reporting@umich.edu with any questions.

☐ Conducting or participating in non-UM research projects (paid or unpaid) **not** processed through a U-M system (e.g., not captured on a PAF, AWD, SUBK, UFA, Development, Procurement, etc.)

* Provide the project titles/names and aims:

* Provide the name of the entity sponsoring the research:

* Does the non-UM research involve [scientific, budgetary, or commitment overlap](#) with any of your U-M research?

☐ Yes ☐ No [Clear](#)

* Describe how the non-UM research does or does not overlap with your U-M research.



☐ Speaking engagements

* Describe the nature of the speaking engagement(s) (e.g., topic, honoraria, relatedness to U-M research):

☐ Teaching a class/course (if you have any type of appointment associated with this activity, please also select Appointment above)

* Provide the course name(s):

☐ Editorial position (e.g., editor of journals or other publications)

* Provide name(s) of journal/editorial and specify your role/title(s):

☐ Expert witness or other legal service

* Provide a brief description:

☐ Reviewer (e.g., site, program, grant reviewer with [exceptions](#))

☐ Other (e.g., loan to or from outside organization, volunteer/community service, venture or other capital financing)

* Provide details about your activity, relationship, or interest:

8. If there is any other relevant information, please provide.



* 9. Select the range of the [aggregated value](#) (excluding travel) received from this entity in the past 12 months including the current value of any equity (if public or known):

* 10. Is this outside entity/organization...

* funding or supporting your U-M research (including salary, supplies, equipment, etc.)?

☐ Yes ☐ No [Clear](#)

* providing or supplying a product (e.g., an app, device, drug, compound, software, survey, evaluation) used in your U-M research project(s) either for free (e.g., donated) or at a cost?

☐ Yes ☐ No [Clear](#)

* a subcontractor or subrecipient supported by your U-M research, or a collaborator/service provider for your U-M research?

☐ Yes ☐ No [Clear](#)

* involved in your U-M research in a manner not listed above?

☐ Yes ☐ No [Clear](#)

* Please explain:

* 11. Does any of your research related to this outside entity involve human subjects?

☐ Yes ☐ No [Clear](#)



Attestation

Read the following and attest below:

- I have read and agree to abide by the [U-M policies and guidelines](#) and all applicable sponsor requirements governing outside activities, relationships, and interests, conflicts of interest, and conflicts of commitment.
- The information I provided about my outside activities, relationships, and interests is complete and accurate to the best of my knowledge.
- To the best of my knowledge, the disclosed outside activities, relationships, and interests are allowable under U-M policies, do not interfere with my primary obligations to U-M, and do not involve more than incidental use of U-M resources (e.g., facilities, personnel, equipment, etc.).
- I am **not** participating in a Malign Foreign Talent Recruitment Program, which is prohibited by federal and [U-M policy](#).
- I will update my disclosure promptly (within 30 days) of any change to my previously disclosed outside activities, relationships, and interests or to add a new outside activity, relationship, or interest.
- I understand that I may be subject to disciplinary action up to and including termination of employment for non-compliance with U-M policies, guidance, and standard practice guides.
- False, fictitious, or fraudulent statements or claims (including omissions) in violation of U-M policies and guidelines may result in criminal, civil, administrative, sponsor, or University actions.
- If funded by or applying for funding from any Federal Agency, including but not limited to the Department of Energy, the National Institutes of Health, the National Science Foundation, and the Department of Defense, I am certifying that I understand that this Disclosure is required to obtain funding from the U.S. Government. I certify to the best of my knowledge and belief that the information contained in this Disclosure Statement is true, complete, and accurate. I understand that any false, fictitious, or fraudulent information, misrepresentations, 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. (18 U.S.C. §§ 1001 and 287, and 31 U.S.C. 3729-3730 and 3801-3812). I further understand and agree that (1) the statements and representations made herein are material to U.S. Government's funding decision, and (2) I have a responsibility to update the disclosures during the period of performance of the award should circumstances change which impact the responses provided above.

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Exit

Save

Continue

☐

*** I attest that I have read and accept the above**

*** Are you ready to submit your disclosure for review?**

Selecting “Yes” and clicking “Save” or “Finish” will immediately submit your disclosure for review.
If you just wish to save the information you have entered and submit it at another time, select “No” and click “Save” or “Finish”.

☐ Yes

☐ No

[Clear](#)

Once you accept the attestation above, indicate you are ready to submit your disclosure, and click FINISH, your disclosure will be routed to the appropriate department/unit reviewer.