Update Your Company Profile in M-Inform

As a U-M employee, student, or trainee, you are expected to disclose your ownership of, or relationship with, any company you start in order to option, license, distribute, or commercialize the intellectual property you developed at the University of Michigan. When a new company is identified (via the COI question on a PAF or by the U-M Office of Technology Transfer), the appropriate COI Office prompts the UM Company Contact Person to complete a Company Profile in M-Inform for conflict of interest review.

While updates can be made to the Company Profile at any time, you are expected to verify and update the information on an annual basis.

Access the Company Profile in M-Inform

There are two ways to log in to M-Inform and open your Company Profile.

- Log in by clicking the link in the notification email, or
- Log in from Wolverine Access (https://wolverineaccess.umich.edu/) > Faculty & Staff tab > University Business menu > M-Inform (Disclosure System).

Log in with your uniqname and UMICH password. An M-Token is not required.

Upon logging in, you will be in your M-Inform Discloser Workspace.

1. Click the My Companies tab.
2. From the Action Required list, click the Name of the Company Profile you wish to update. The Company Profile workspace displays.

3. Click Edit Company Profile.

The state of the Company Profile is Review Company Information, and it contains only the company’s legal name, address, and your name (listed both as the UM Company Contact Person and as a UM employee engaged with the company). Follow the steps below to complete the initial Company Profile.
Complete the Initial Company Profile

Company Profile Form

4. If applicable, enter any other names by which the company is known, does business, or used to do business in the **Company Previous Name(s)** field.

5. Verify the **Address** is correct. If changes are needed, contact the [COI.Support@umich.edu](mailto:COI.Support@umich.edu)

6. Click your name and enter your **Organizational Role** in the pop-up window that displays. Then click **OK**.

7. Click **Add** to enter the U-M employees, students or trainees who are engaged at the company.

8. Enter the last name or uniqname of the person in the **Enter UM Employees...** field, and then select the correct person from the list of matching values that displays.

9. Answer the following questions about the UM person affiliated with your company.

   **Organizational role** (type in)

   **Actively engaged?** (Y/N)

   **UM student?** (Y/N)

10. If the person is a UM student, enter the following information:

   **Supervisor’s name** (type in)

   **Description of work** (type in)

   **Paid?** (Y/N)

   **How paid?** (select payment method)

   - If “Other” selected, enter a description of the payment method.

11. If you wish to enter an additional UM person who is engaged in your company, click **OK and Add Another** and repeat steps 8-10. Otherwise, click **OK** to return to the company profile form.

Once you’ve added a person and clicked **OK** or **OK and Add Another**, you cannot remove them from the company profile. In order to have a person removed from the profile, contact the [ITS Service Center](mailto:ITS.Service.Center@umich.edu).
12. Enter the following information about the company:

- **Board of Directors** (list the names or the URL for/link to the information posted to the company’s web site)

- **Scientific Advisory Board** (list names or URL/link)

- **UM Equity** (Y/N)
  - If “yes,” enter the percentage of equity held by UM in the field that displays (not shown).

- **Current state** (description)

13. Click **Finish** to save the profile and return to the Company Profile workspace.

If there are documents you wish to attach to the Company Profile, complete the following steps. Otherwise, skip to step 20.

- **Click Manage Documents.**
- **Click Add.**
- Enter a **Title** for the document, if desired.
- **Click Browse**, and then select the file you wish to upload.
- **Click OK and Add Another** if you wish to upload more documents. If not, click **OK**.
- **Click OK.**

Uploaded documents display on the **Documents** tab in the Company Profile workspace.
20. Click Sign and Submit.

Note: The system automatically verifies that all required information has been provided. Any errors must be addressed before you can submit the profile for review.

21. Click the checkbox to attest to the accuracy of the information provided.

22. Click OK.

Notes: The Company Profile’s State changes from Review Company Information to COI Review.

• The Edit Company Profile option has changed to View Company Profile, as the record cannot be edited in the state of COI Review.

• Track actions taken with the Company Profile using the Activities and Correspondence table in the Company Profile workspace.

• The Company Profile moves to the Under Review table on the My Companies tab in the Discloser workspace (not shown).
Update/Edit the Company Profile

A Company Profile is only available for editing in the states of Review Company Information or Changes Requested. If you need to update the information after it has been signed and submitted (states of COI Review or Review Complete), you will need to use one of the activities available to you in the Company Profile workspace. The activities available to you will depend on the state of the profile. Any activity used will be recorded in the Activities and Correspondence table at the bottom of the Company Profile workspace.

Update Company Profile for Changes Requested by COI Office

When changes are requested by the COI Office, the UM Company Contact Person is sent an email notification containing a link to the Company Profile requiring changes. You can also find the profile in the Action Required list on the My Companies tab in your M-Inform Discloser workspace. The state of the profile is Changes Requested.

Email Notification

1. Review the Changes requested by COI staff, and then click the link to the Company Profile workspace.

Company Profile workspace

2. Click Edit Company Profile.

3. Make all necessary changes to the profile form (not shown).

4. Use the Sign and Submit activity to send the profile back for COI review.
Update Company Profile while in the state of COI Review

The Company Profile cannot be edited once in the state of COI Review. In order to make changes, you must use the Post Comment activity to request that the profile be unlocked for editing. You will receive an email notification from the COI Office once the profile is ready for editing.

Company Profile workspace

After clicking the link to the Company Profile from the Under Review list on the My Companies tab in your M-Inform Discloser workspace, complete the following steps:

1. Use the Post Comment activity to request that the COI Office unlock the profile for editing. If you are unfamiliar with this activity, see the Post Comment section for details.

2. Once you’ve received the email notification from the COI Office informing you that you can edit the profile, click the link to the Company Profile.

Email Notification

3. Click Edit Company Profile.

4. Make all necessary changes to the profile form (not shown).

5. Use the Sign and Submit activity to send the profile back to COI Office for review.
**Update Company Profile after COI Review is complete**

Once your Company Profile has been reviewed and approved by the COI Office, it is in a state of **Review Complete**. In order to make changes to the profile, you must use the **Update Company Profile** activity to change the profile’s state to **Review Company Information** and unlock it for editing.

**M-Inform Discloser workspace > My Companies tab**

1. From the **Review Complete** list, click the **Name** of the Company Profile you wish to update.

2. Click **Update Company Profile**.

3. Click **OK** in the pop-up window that displays.

The state of the profile changes to **Review Company Information**. Click **Edit Company Profile** and complete all necessary updates. Then use the **Sign and Submit** activity to send the updated profile for COI review.

**Post Comment for COI Office**

Available in all states, the **Post Comment** activity can be used to communicate requests to the COI Office (e.g., request to unlock profile for editing, remove people from the profile, change the UM Company Contact, etc.). The activity and comments are posted in the **Activities and Correspondence** table in the Company Profile workspace. If you wish to also send an email to the COI Office, you must add the COI Staff Owner as an email recipient. The COI Office may also use the Post Comment activity to communicate with the UM Company Contact Person.

**Company Profile workspace**

1. Click **Post Comment**.
2. Enter comments in the field provided.

3. If you wish to send an email to the COI Office with your comments, enter the name of the COI Staff Owner, and then select their name from the list of matching values that displays.

   **Note:** If you do not enter an email recipient, no notifications/comments will be sent.

4. Click OK.

The comment is posted in the **Activities and Correspondence** table at the bottom of the Company Profile workspace. If you entered an email notification recipient, an email containing your comments is also sent to the specified person.