



JOB AID

Creating a New or Annual Disclosure

When MSU switches from e-Transmittal to Kuali Coeus, all faculty and academic staff will enter their disclosures in the Kuali Coeus system. All Disclosures types—annual, travel, project—must be entered into Kuali Coeus (KC). For instructions on updating your disclosure in KC, see the Job Aid for Updating a Master Disclosure.

**NOTE:** MSU's [Faculty/Academic Staff Conflict of Interest Policy](#) requires that MSU faculty and academic staff submit an **annual disclosure of all significant financial interests** related to their MSU responsibilities. For more information on MSU's Conflict of Interest policies, and what constitutes a significant financial interest, go to [www.coi.msu.edu](http://www.coi.msu.edu).

**WHO:**

- All MSU faculty and academic staff appointed through the academic personnel system with research, teaching, outreach, or service institutional responsibilities. This Policy also applies to other individuals who have independent responsibility for proposing, conducting, or reporting the results of University research and other sponsored projects

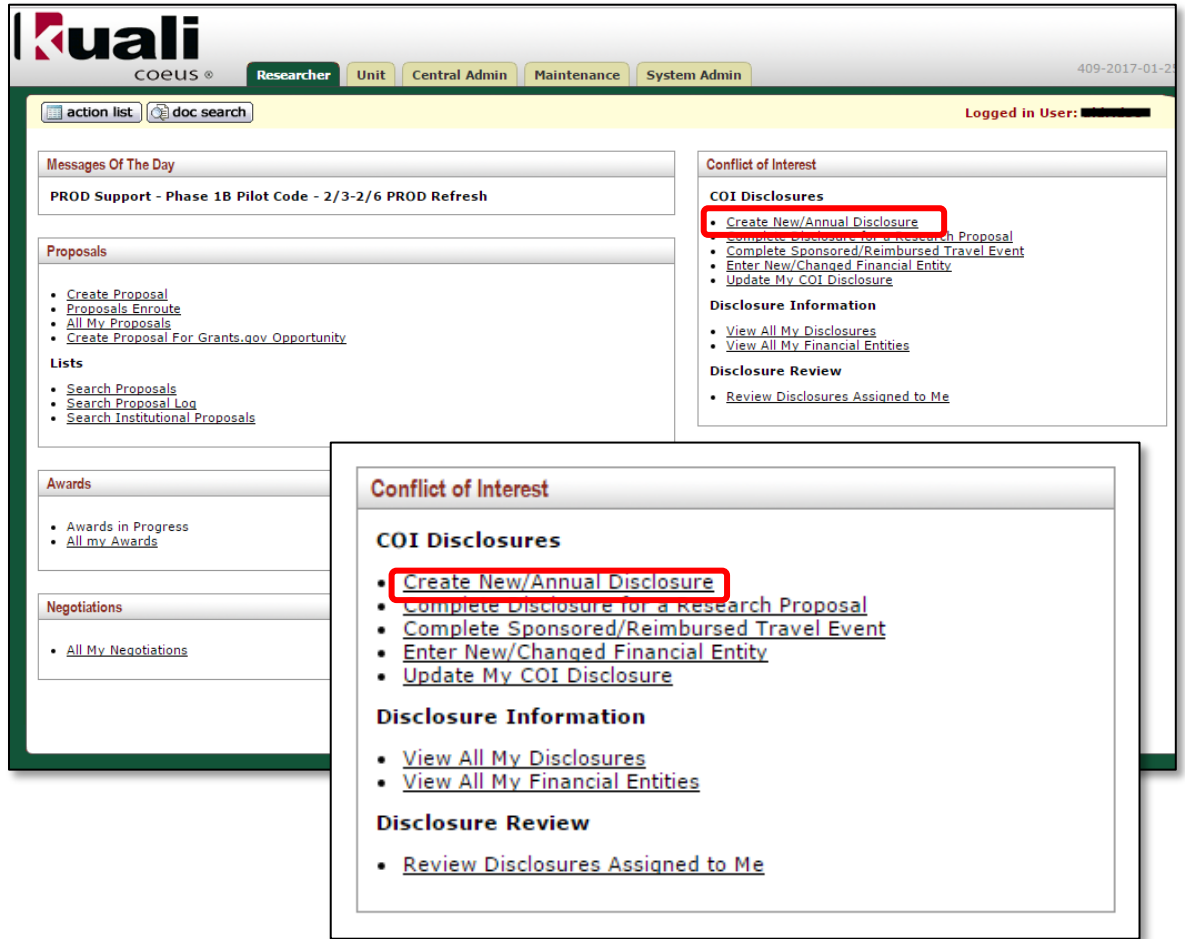
**WHEN:**

- The Initial Disclosure in KC is submitted one time (after that, disclosures must be certified within twelve months of the most recent disclosure).

**HOW:**

**Creating a New or Annual Disclosure in KC**

1. Login in to KC.
2. From the KC Main Menu, with the **Researcher** tab selected, click on **Create New/Annual Disclosure** in the **Conflict of Interest** channel.



- The **KC COI Disclosure** screen appears. This screen contains eight panels, and the **Reporter** panel will be displayed open. This panel will display all of your contact information.

Reporter		hide	
<b>Contact Information</b>			
<b>Full Name:</b>	Donatien-Pascal Kamdem	<b>User Name:</b>	kamdem
<b>Email Address:</b>	kfstester@ais.msu.edu	<b>Office Phone:</b>	+15174320449
<b>Primary Title:</b>		<b>Directory Title:</b>	
<b>Home Unit:</b>	10002634	<b>School:</b>	
<b>eRA Commons User Name:</b>		<b>Fax:</b>	
<b>Pager:</b>		<b>Mobile:</b>	
<b>Office Location:</b>		<b>Secondary Office Location:</b>	
<b>Address Line 1:</b>	PACKAGING	<b>Address Line 2:</b>	448 WILSON RD RM 141
<b>Address Line 3:</b>		<b>City:</b>	EAST LANSING
<b>County:</b>		<b>State:</b>	MICHIGAN
<b>Postal Code:</b>	48824	<b>Country:</b>	United States

- The Document Header in the upper right corner of the screen will display **In Progress** in the **Disclosure: Review Status** field if the disclosure needs to be completed. The field will display **Routed for Review** if the disclosure has already been submitted.

<b>Document Id:</b>	22003	<b>Disclosure:Review Status:</b>	In progress : In Progress
<b>Status:</b>	In progress	<b>Reporter:Created:</b>	kamdem:02/03/2016
<b>Last Updated:</b>	09:23 AM 02/03/2016	<b>Disclosure Number:</b>	1001043720

3. Scroll to the **Screening Questionnaire** panel and click **show** adjacent to **COI Screening Questionnaire (Incomplete)**.

- The following question will appear: *Do you have any significant financial interests related to your MSU responsibilities?*

**NOTE:** For more information on what constitutes a reportable significant financial interest, visit MSU's Conflict of Interest webpage: <https://coi.msu.edu>.

Screening Questionnaire hide

hide COI Screening Questionnaire (Incomplete)

hide Questions

Do you have any significant financial interests related to your MSU responsibilities?

Yes  No

4. If you have no significant financial interests to report, select the **No** radio button.

- For an answer of no, scroll to the bottom of the page, place a checkmark in the **Certification** check box. This will expand the section, showing the **submit** and **print** buttons.

Certification - Not yet certified

I understand that it is my responsibility to update my Annual Disclosure within thirty days of acquiring any new significant financial interest (SFI) related to my institutional responsibilities or with any change in details/relationships with my SFI entities. I certify that this Annual Disclosure of my current personal SFIs is complete and accurate to the best of my knowledge.

Reporter: Patti Kali Certification Date: N/A submit print

Data Validation show

save reload close

- Click **submit**. You are finished. The Document Header will show **Routed for Review** as the Disclosure Status.

5. If you do have financial interests that meet the definition of reportable financial interests, select the **Yes** radio button.

6. For an answer of yes, scroll to the bottom of the page, place a checkmark in the **Certification** check box. This will expand the section, showing  and  buttons.

7. Click .

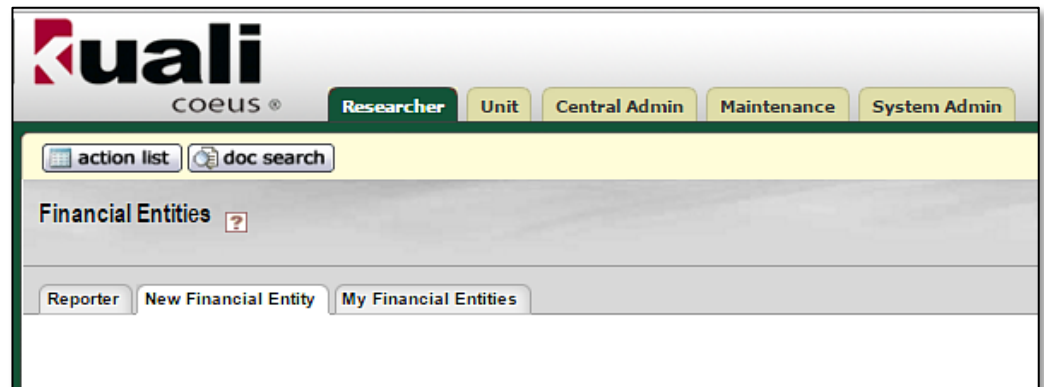
- This action will cause KC to display the following: *Based on your answer to the screening questionnaire, you must have at least one active financial entity to submit this disclosure. Do you want to add a financial entity at this time?*

**NOTE:** A *financial entity* is a business, financial interest, etc. in which you personally hold an interest, for example: a business you own; a company in which you hold over \$5,000 worth of stock; an organization which pays you more than \$5000 annually, etc. Please see <https://coi.msu.edu> for a more complete listing of interests that should be reported.

8. Click .

**NOTE:** If  is clicked the Reporter is redirected to the annual disclosure page and has the option to save the disclosure (but not submit it) or to return to the question about adding Financial Entities and answering "Yes."

- A new screen will become visible, **Financial Entities**, with the **New Financial Entity** tab displayed.



9. In the **New Financial Entity** tab, complete all the fields with adjacent asterisks.

10. Next, answer the three questions about how this entity relates to your work.

11. Move down to the **Relationship Details** subpanel. Place checkmarks in check boxes defining your relationship with the financial entity.

**NOTE:**

- You must place a check in each row—if no relationship exists in a listed category, select **None**.
- You cannot select **None** for all rows—at least one row needs a selection of Self, Family, or Jointly.
- If you check **None** for a row, you cannot check any of the other boxes in that row.
- For any category that you answer as Self, Family, and/or Jointly, you must add comments in the comments field to explain the relationship.

Relationship Details					
Payments/Income over \$5000:	None	Self	Family	Jointly	Comment
Salary (outside work for pay):	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Consulting fees (OWP):	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I work for the company during the summer months
Equity in lieu of payment:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Royalties/non-MSU Intell. Prop:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Advisor/fiduciary/partner pay:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Investment income:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Trust income:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other income, expert witness:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Own business or stock:	None	Self	Family	Jointly	Comment
Do you own over 1% or \$5000?:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Trustee or trust beneficiary:	None	Self	Family	Jointly	Comment
w/ investmts related to work?:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Indebtedness to Entity:	None	Self	Family	Jointly	Comment
Borrowed/loaned over \$5000?:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

12. You have the option to include any attachments that confirm your relationship with the entity in the **Attachments** panel.

Attachments						
Attachments						
	Posted Timestamp	Uploaded By	Contact Name	Email	* Description	* File Name
Add:			<input type="text"/>	<input type="text"/>	<input type="text"/>	Choose File   No file chosen

13. Click  at the bottom of the screen when finished.

- KC will automatically run Data Validation when the submit action button is clicked. It will point out any errors so you can rectify them.
- If no errors are present when the submit action button is clicked, KC will display the following question: *“Do you want to add another financial entity or edit an existing entity?”*
- Select **Yes** or **No**.
- If you have an additional financial entity to report, select **Yes** and then repeat steps 10-13.
- If you have completed entering your financial entities, select **No**. Your disclosure submission is complete.

After the Disclosure is submitted, the Document Header at the top of the screen will show **Routed for Review: Submitted for Review** in the **Disclosure: Review Status** field.

<b>Document Id:</b>	22003	<b>Disclosure:Review Status:</b>	Routed for Review : Submitted For Review
<b>Status:</b>	Under COI Office Review	<b>Reporter:Created:</b>	kamdem:02/03/2016
<b>Last Updated:</b>	02:02 PM 02/03/2016	<b>Disclosure Number:</b>	1001043720