



Teachers College
COLUMBIA UNIVERSITY

Outside Interests
Quick-Guide:
**Disclosee – Adding
Relationships with an
External Organization**

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Title: Outside Interest Quick-Guide: Disclosee - Adding Relationships with an External Organization	Process Owner: Office of Vice President for Administration	Approved By: Akesia Phillip, Sr. Manager, Planning and Operations
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RELATIONSHIPS & EXTERNAL ORGANIZATIONS

Adding Relationships with an External Organization

Add external organizations for relationships as needed for each COI disclosure form question (when questions are answered affirmatively).

Follow the following steps after logging into Cayuse to start a new disclosure. For assistance, review the *Completing an Annual Disclosure Form* quick-guide, or visit www.tc.columbia.edu/vpa/coi/.

1. Select **+ Add New Relationship** to provide details for each relationship listed
2. Select hyperlink **Find External Organization** to launch External Org Finder
3. Enter the full organization name in search bar

Note: Search in the second search field with a magnifying glass icon. Once the organization appears below that field, select that organization by clicking on the “+” on the right side, or on the organization name ([See Image 1. Search Tip for Finding Organizations](#))

4. **Select** organization name
5. Select **Save** to return organization to the form
6. Enter relationship details
7. Continue to answer subsequent form questions

Note: A green check mark will appear in each section of the Table of Contents indicating successful completion.

8. Select **Next**
9. Attach relevant documents regarding any of the relationships listed in each section, as applicable.
10. Disclosee submits the disclosure for review
 - a. Select **Submit**
 - b. Select **Proceed** to route the form to the reviewer.

External Organizations Not Listed in Cayuse

When a disclosee adds a relationship with an organization that is not listed in the External Org finder.

1. Select **+Add New Relationship**
2. Select **Find External Organization**
3. Search for the organization and find that it is not listed

Note: Search in the second search field with a magnifying glass icon ([See Image 1. Search Tip for Finding Organizations](#))

4. Select **+ Request New External Org**

5. Enter organization name in the field **External Org Name**
6. Select **Save**
7. Select **Save** (again)

Note: A clock icon will appear next to the organization name indicating that this external organization is under review by administrative staff and will be added to the external organization list once approved.

Note: [Click here to see images in "External Organizations Not Listed" for additional information](#)

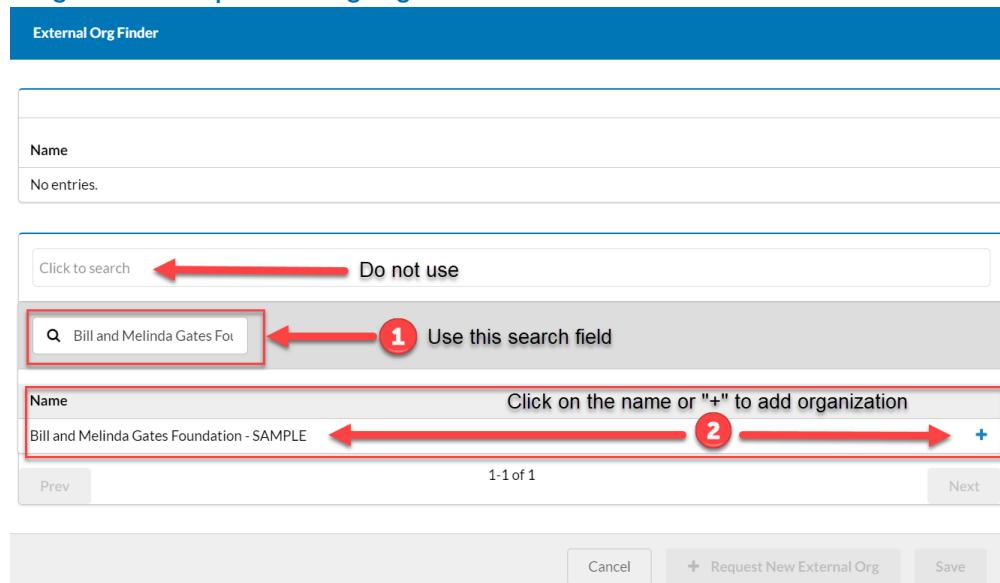
Adding Relationships with No Organizational Affiliation

Some relationship questions do not apply to an external organization and are regarding relationships with people. For those questions, enter "Not Applicable" as the organization. This field is required by the system and will not allow you to proceed with the submission of the form without it.

1. Select **+Add New Relationship**
2. Select hyperlink **Find External Organization**
3. Enter in the search field **"Not Applicable"**
4. Select **"Not Applicable"** option
5. Select **Save**
6. Continue completing the COI disclosure form form questions

Searching for an External Organization

Image 1. Search Tip for Finding Organizations



External Org Finder

Name

No entries.

Click to search ← Do not use

Q Bill and Melinda Gates F... 1 Use this search field

Name Click on the name or "+" to add organization

Bill and Melinda Gates Foundation - SAMPLE 2 +

Prev 1-1 of 1 Next

Cancel + Request New External Org Save

External Organizations Not Listed

Image 2. Step 1- Finding an Unlisted Organization

External Org Finder

Name
No entries.

Click to search

1 Search

2 Name
This organization was not found. Use **Request New External Org** to submit a disclosure for this organization. Search results indicate that organization is not in the system

Prev 0-0 of 0 Next

Cancel **+ Request New External Org** 3 Request Save

Image 3. Step 2- Finding an Unlisted Organization

Request New External Organization

External Org Name * Enter the Organization Name here

Cancel Save

Image 4. Step 3- Finding an Unlisted Organization

External Org Finder

3 Name
XYZ

Click to search

1 Once an external organization is requested, the same steps as adding an existing organization should be followed in the order shown here.

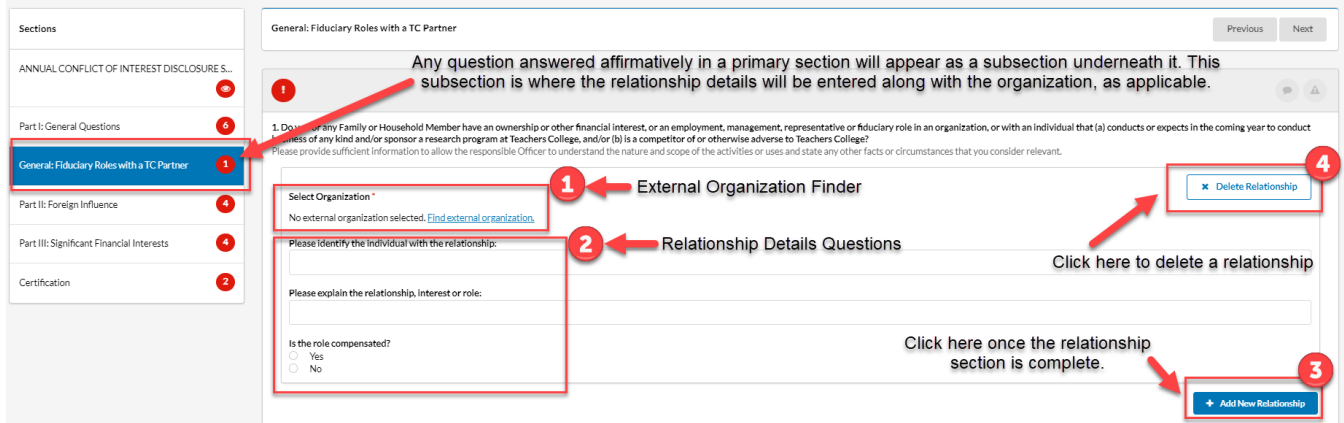
2 Name
XYZ +

Prev 1-1 of 1 Next

Cancel **+ Request New External Org** 4 Save

Adding Details of a Relationship

Image 5. Subsection and +Add Relationship Section



Sections

- ANNUAL CONFLICT OF INTEREST DISCLOSURE S...
- Part I: General Questions
- General: Fiduciary Roles with a TC Partner**
- Part II: Foreign Influence
- Part III: Significant Financial Interests
- Certification

General: Fiduciary Roles with a TC Partner

Any question answered affirmatively in a primary section will appear as a subsection underneath it. This subsection is where the relationship details will be entered along with the organization, as applicable.

1. Do you or any Family or Household Member have an ownership or other financial interest, or an employment, management, representative or fiduciary role in an organization, or with an individual that (a) conducts or expects in the coming year to conduct business of any kind and/or sponsor a research program at Teachers College, and/or (b) is a competitor of or otherwise adverse to Teachers College?
Please provide sufficient information to allow the responsible Officer to understand the nature and scope of the activities or uses and state any other facts or circumstances that you consider relevant.

1 External Organization Finder

Select Organization *

No external organization selected. [Find external organization](#)

2 Relationship Details Questions

Please identify the individual with the relationship:

Please explain the relationship, interest or role:

Is the role compensated?

☐ Yes

☐ No

3 Click here once the relationship section is complete.

4 Delete Relationship

Click here to delete a relationship

Add New Relationship

PRINTING A COI DISCLOSURE FORM

A printing option is available to print COI disclosures for administrators, reviewers, and discloses.

1. **Login** to Cayuse account using SSO credentials
2. Select **Products** dropdown to reveal a drop down menu
3. Select **Outside Interests**
4. Select the relevant disclosure under the section **Disclosures Assigned to Me**
5. Select **Print to PDF**