



Teachers College
COLUMBIA UNIVERSITY

Outside Interests

Quick-Guide:

**Disclosee – Completing a
COI Disclosure Form in
Cayuse**

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Title: Quick-Guide: Disclosee - Completing a Disclosure Form in Cayuse	Process Owner: Office of Vice President for Administration	Approved By: Akesia Phillip, Sr. Manager, Planning and Operations
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COMPLETING AN ANNUAL COI DISCLOSURE FORM

1. **Login** to Cayuse account using SSO credentials through myTC or the Employee Portal
2. Select your **Name** to reveal a drop down menu
3. Select option **My Profile**
4. Select **COI Disclosures** from the **Table of Contents**
5. Select **+ New Disclosure**
6. Select **Start a new Annual disclosure**
7. Select **Next**
8. Answer form questions within each **Table of Contents** section (see [Appendix I](#) for a detailed layout and explanation of the COI disclosure form):
 - a. Read section **Annual Conflict of Interest**
 - b. Complete **Part I: General Questions**
 - i. If question 1 is answered affirmatively, complete the trigger section **General: Fiduciary Roles with a TC Partner** ([see section "Adding Relationship Details" for screenshots](#))
 - ii. If question 2 is answered affirmatively, complete the trigger section **General: Family/Household Relationships with TC**
 - iii. If question 3 is answered affirmatively, complete the trigger section **General: Employment Relationships with TC Personnel.**
 - iv. If question 4 is answered affirmatively, complete the trigger section **General: Employment Relationships Outside TC**
 - v. If question 5 is answered affirmatively, complete the trigger section **General: Business Relationship with TC Personnel**
 - vi. If question 6 is answered affirmatively, complete the trigger section **General: Student Interactions**
 - vii. If question 7 is answered affirmatively, complete the trigger section **General: Remuneration from TC vendor or sponsor**
 - c. Complete **Part II: International Activities**
 - i. If question 1 is answered affirmatively, complete the trigger section **International Activities: Foreign Appointments**
 - ii. If question 2 is answered affirmatively, complete the trigger section **International Activities: Programs Sponsored by Foreign Entities**
 - iii. If question 3 is answered affirmatively, complete the trigger section **International Activities: Students, Postdocs, or Visiting Scholars**
 - iv. If question 4 is answered affirmatively, complete the trigger section **International Activities: Travel Sponsored by Foreign Entities**

- d. Complete **Part III: Significant Financial Interest**
 - i. If question 1 is answered affirmatively, complete the trigger section **SFI: Remuneration Over \$5,000**
 - ii. If question 2 is answered affirmatively, complete the trigger section **SFI: Equity & Stocks**
 - iii. If question 3 is answered affirmatively, complete the trigger section **SFI: Intellectual Property**
 - iv. If question 4 is answered affirmatively, complete the trigger section **SFI: Externally Funded Travel**
- e. Complete **Certification**

Note: Affirmative answers will reveal an additional COI disclosure form subsection to be completed and will appear on the table of contents.

UPDATING A COI ANNUAL DISCLOSURE FORM

Teachers College employees are responsible for disclosing new relationships that have occurred outside of the Annual Campaign timeframe, within **10 days** of the start of the new relationship.

Disclosees should follow the Completing an Annual COI Disclosure form instructions above to update their annual COI disclosure forms. Previous relationships will auto-populate on the new form. Confirm that these relationships still exist and are current.

Note: Disclosees will see a record of their completed COI Disclosure forms in their profiles. There will be a blue button “Modify”. DO NOT USE this function to update your annual COI disclosure form.

Note: If any relationship questions were answered affirmatively in the previous year’s disclosure, that relationship(s) will appear on a newly created disclosure – select “Review and Accept” to confirm that a relationship still exists since your last submitted annual disclosure; or select “Delete Relationship” if this relationship no longer exists.

PRINTING A COI DISCLOSURE FORM

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

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**