

## JOB AID

### Creating a Travel Disclosure

**NOTE:** MSU's [Faculty/Academic Staff Conflict of Interest Policy](#) requires that all MSU faculty and academic staff submit **disclosures 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 who are Investigators, Co-investigators, or Key Personnel on research projects sponsored by any U.S. Public Health Services (PHS) agency, or other agencies that follow PHS FCOI Regulations who have travel sponsored or reimbursed by a non-governmental entity
- Examples of PHS agencies include:
  - ✓ Centers for Disease Control and Prevention (CDC)
  - ✓ Food and Drug Administration (FDA)
  - ✓ National Institutes of Health (NIH)
- Non-PHS agencies that adhere to PHS FCOI regulations include:
  - ✓ American Cancer Society (ACS)
  - ✓ American Heart Association (AHA)
  - ✓ American Lung Association (ALA)
  - ✓ Arthritis Foundation (AF)

- The requirement to disclose paid or reimbursed travel expenses applies only to researchers on PHS-sponsored projects.
- If the travel is related to the PHS-funded research—it does not need to be disclosed, as it's being documented as part of the award budget.
- Travel that is sponsored by *other* entities is what needs to be disclosed.

For a complete list of agencies that follow PHS FCOI regulations, go to  
[http://nrc59.nas.edu/pub/fcoi\\_agencies\\_phs\\_regs.html](http://nrc59.nas.edu/pub/fcoi_agencies_phs_regs.html)

#### WHEN:

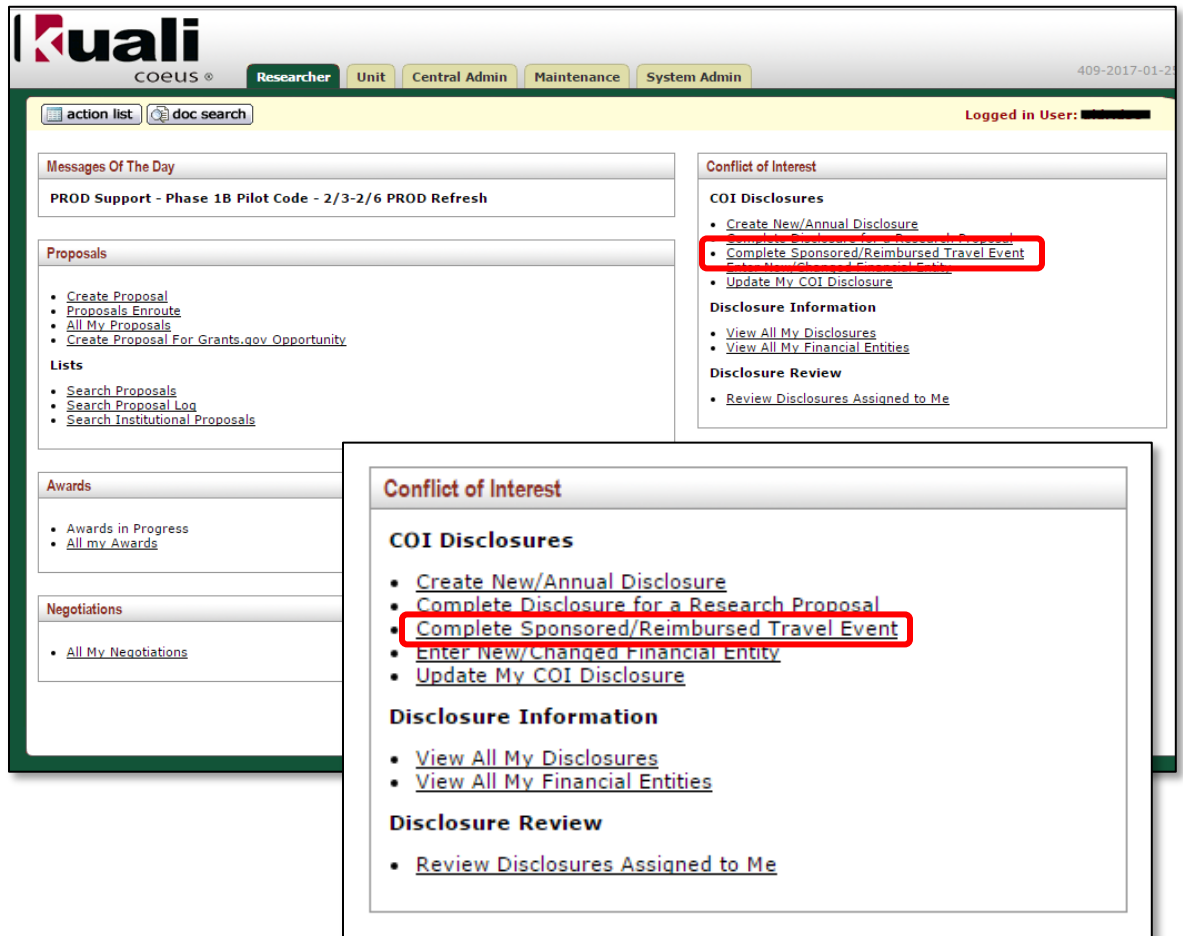
Anytime a PHS researcher has travel paid for or reimbursed by an entity *other than*:

- Domestic (U.S.) federal, state or local government
- Domestic institution of higher learning
- Academic teaching hospital
- Research institute that is affiliated with an institution of higher education

HOW:

Creating a Travel Disclosure in KC

1. Login in to KC.
2. From the KC Main Menu, with the **Researcher** tab selected, click on **Complete Sponsored/Reimbursed Travel Event** in the **Conflict of Interest** channel.



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

Reporter	
<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

3. Scroll to the **Manual Event and Financial Entities** panel and click **show**.
4. From the **New Event Project** subpanel, select **Travel Disclosure** from the dropdown menu (it is the only choice available).


The screenshot shows a web form titled "COI Training Information". At the top, there are fields for "COI Training Completion Date:" and "COI Training Type:". Below these is a section titled "Manual Event and Financial Entities" with a "hide" button. This section is expanded, showing a subpanel titled "New Event Project" with a "hide" button. Inside this subpanel, the "Event Type:" field has a dropdown menu open, showing "select", "select", and "Travel Disclosure" as options. Below the subpanel are sections for "Notifications", "Notes & Attachments", and "Certification", each with a "show" button. At the bottom of the form are "save" and "close" buttons.

- This will fully open the **Manual Event and Financial Entities** panel. Complete all the required fields (asterisk fields).
  - ✓ \* Event Type:
  - ✓ \* Event Title:
  - ✓ \* Destination/Location of Travel:
  - ✓ \* Sponsor Name:
  - ✓ \* Amount of reimbursement received:
  - ✓ \* Purpose of Travel:
  - ✓ \* Start Date:
  - ✓ \* End Date:

The screenshot shows the "Manual Event and Financial Entities" form with all required fields filled out. The "Event Type" is "Travel Disclosure", "Event Title" is "Rufus T. Firefly Conference", "Destination/Location of Travel" is "Oxnard, CA", "Sponsor Name" is "NIH", "Amount of reimbursement received" is "\$755", "Purpose of Travel" is "To attend conference", "Start Date" is "02/18/2016", and "End Date" is "02/22/2016". The "add" button is highlighted with a red box.


Field	Value
* Event Type:	Travel Disclosure
* Event Title:	Rufus T. Firefly Conference
* Destination/Location of Travel:	Oxnard, CA
* Sponsor Name:	NIH
* Amount of reimbursement received:	\$755
* Purpose of Travel:	To attend conference
* Start Date:	02/18/2016
* End Date:	02/22/2016

5. Click **add**.

**NOTE:** After you have added your travel information, you can move to the bottom of the screen and click  to save the e-Doc and complete it later.

- If you have already entered Financial Entities in KC, make a selection for each entity in the drop-down list, under the **Related to this Project?** column, to indicate whether this travel is related to the Financial Entity.

▼ hide <span style="color: red;">!</span> Financial Entities (0/2 Reviews Complete)		
Review	Entity	Related to this Project?
	<input type="text" value="new financial entity"/>	<input type="text" value="select"/>
<input type="button" value="view"/> <input type="button" value="edit"/> <input type="button" value="history"/>	Mainway Industries, LLC	<input type="text" value="select"/>
<input type="button" value="view"/> <input type="button" value="edit"/> <input type="button" value="history"/>	Spacely Sprockets, Ltd.	<input type="text" value="select"/>

6. On the **Certification** panel, place a check in the checkbox on the left side of the panel and click .

**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 Certification Date

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Data Validation

- KC will automatically run Data Validation when the **submit** action button is clicked. It will point out any errors so you can rectify them.

7. Next, KC will pose the this question:

*Do you have any other significant financial interests related to your MSU responsibilities to report? Answering 'no' means you certify that your current disclosure of personal significant financial interests related to this project and to your other MSU responsibilities is complete and accurate to the best of your knowledge.*

- If the answer is no, click that button and you are finished (document header will indicate **Routed for Review**).

- If the answer is yes, click it and KC will launch the **New Financial Entity** tab of the **Financial Entities** screen. Fill out the required fields and answer all the questions posed. For detailed instructions on completing this tab, refer to the job aid titled “Enter a New/Changed Financial Entity.” After entering Financial Entity information, you will return to the Travel Disclosure screen.
- Scroll to the **Manual Event and Financial Entities** panel and update your **Related to this Project?** answers for the new financial entity.

hide Financial Entities (2/3 Reviews Complete)		
Review	Entity	Related to this Project?
	new financial entity	select
view edit history	Spacely Sprockets, Ltd.	Not Related
view edit history	Mainway Industries, LLC	Not Related
view edit history	Cogswell Cogs, Inc.	select

8. Scroll to the bottom of the page again and place a checkmark in the box on the **Certification** panel, place a check in the checkbox on the left side of the panel and click **submit**.
- 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>	7775642	<b>Disclosure:Review Status:</b>	Routed for Review : Submitted For Review
<b>Status:</b>	Under COI Office Review	<b>Reporter:Created:</b>	osbornd7:02/11/2016
<b>Last Updated:</b>	02:43 PM 02/11/2016	<b>Disclosure Number:</b>	1000065788