CoeusLite My COI: Create Travel Disclosure (PHS only)

Travel Disclosure is required for NIH/PHS Investigators (including Key Study Persons) only. Travel disclosures must be submitted within 30 days following reimbursement or within 30 days following the completion of a trip, if the PHS Investigator has an active award or pending proposal with a PHS agency. Enter information for travel directly paid for or reimbursed by a Significant Financial Entity (do not report travel reimbursed by MIT).

**Note:** Travel disclosures must be made if travel is paid on your behalf (either directly or through reimbursement) by an organization other than MIT; US Federal, state or local government agencies; US Institutes of Higher Education; US Research Institutes affiliated with Institutes of Higher Education; and, US Academic Teaching Hospitals and Medical Centers. Travel paid by for-profit entities, foreign governments, universities and research institutes or non-profit organizations that are not US Institutes of Higher Education must be disclosed.

**Create > Travel Disclosure (PHS only)**

1. From the CoeusLite MY COI screen (https://coeus.mit.edu/coeus/coi.do?Menu_Id=004), click the Travel Disclosure (PHS only) button under the Create heading.

2. The Travel Disclosure by <lastname, firstname> screen will display.

3. Each field marked with a red asterisk * is required to Certify and submit for review or Save for modification later.

**Note:** To Cancel or Close the Travel Disclosure screen without saving or certifying for approval, simply navigate by clicking MY COI from the left navigation pane or the menu bar. Any data entered will not be saved..

**Entity Name**

Select the entity that directly paid on your behalf or reimbursed you for the trip. Entities for which you have previously entered SFI data in the Coeus COI module will be listed in the Select an existing SFI pull-down menu. You may add a new entity if a listing does not currently exist.

If you have previously entered SFI data for the entity in the Coeus COI module:

1. Select the Entity Name from the Select an existing SFI pull-down menu.

If you have not previously entered SFI data for the entity in the Coeus COI module:

1. Click the Add New Entity button. The Add Significant Financial Interest screen will display.
Add Significant Financial Interest

1. On the Add Significant Financial Interest screen, enter details for the Significant Financial Interest in required fields marked with a red * asterisk:
   - **Entity Name** – enter the full name of the domestic or foreign, public or private, organization (excluding MIT; US Federal, state or local government agencies; US Institutes of Higher Education; US Research Institutes affiliated with Institutes of Higher Education; and, US Academic Teaching Hospitals and Medical Centers) that directly paid for or reimbursed you, your spouse or dependent children for the trip.
   - **Publicly/Privately held** – select from the menu to indicate if the entity is public (shares/stock are publicly traded) or Private (no shares are publicly traded).
   - **Type** – Select from the menu (i.e., For-profit Organization, Federal Government, Small business).
   - **Are you/Family member a Founder/Co-Founder of this entity?** – Select the Yes or No radio button.
   - **In a few sentences briefly describe the entity’s area of business focus and specifically your work or Role with the entity** – enter a detailed description of the business and your involvement.
   - **Explain any involvement of students under your direction at MIT with this entity:** – enter a detailed description.
   - **Explain any involvement of staff or subordinates under your direction at MIT with this entity:** – enter a detailed description.
   - **Explain any use of MIT resources and/or facilities relating to your work with this entity:** – enter a detailed description.

2. Click the Save button.

![Add Significant Financial Interest Screen](image)

**Note:** Once created, an SFI Entity will remain as part of your Master Disclosure permanently. SFIs may be marked “Inactive” by clicking on the SFI Entity (make Inactive) button under the View/Print heading of the My COI screen, but SFI Entities can never be deleted and remain part of the historical record.
Traveler:

1. Select “who took the trip” from the pull-down menu:
   - You
   - Spouse/Domestic Partner
   - Dependent Children

   ![Traveler Selection](image)

   Note: You may only select one Traveler per Travel Disclosure. When complete, use the Certify & Copy button at the bottom of the screen to certify and submit the original disclosure for review and create a new Travel Disclosure prepopulated with entity and travel details from the original. You may then select a different Traveler whose trip was also directly paid for or reimbursed by a Significant Financial Entity.

Trip Title | Destination

1. Enter a Trip Title (i.e., “AACR conference in LA, 2012”). Enter a descriptive title, as the Trip Title will display in the My COI View/Print All Travel Disclosures list and will assist you in identifying a travel disclosure.
2. Enter the Destination City, State and Country (if foreign travel).

Purpose of the Trip | Relationship to your PHS research

1. In the Purpose of the Trip field, enter a detailed description (i.e., Deliver keynote address).
2. In the Relationship to your PHS research text box, enter a detailed description of how the trip for the entity does or does not relate to your PHS sponsored research.
Actual U.S. dollar amount reimbursed and/or paid on your behalf

1. Enter US dollar amount the Entity reimbursed and/or directly paid on your behalf for the trip (estimate if the amount is unknown).

   650.00

Start Date and End Date

1. Enter **Start Date** in and mm/dd/yyyy format or click on the calendar icon to select the start date.
2. Enter the **End Date** in mm/dd/yyyy format or click on the calendar icon to select the end date.

Certify | Certify & Copy | Certify & Create New Disclosure | Save

When you have completed a Travel Disclosure, click on the appropriate button at the bottom of the screen.

- Click the **Certify** button to certify that the information provided in the travel disclosure is accurate and submit for review.

You will see the pop-up window displayed below. Review the certification statement then click the **Certify** button. If you need to make modifications, click the **Cancel** button and you will return to the travel disclosure screen.

- Click the **Certify & Copy** button to certify that the information provided in the travel disclosure is accurate and submit for review, and also create a copy or clone of the travel disclosure prepopulated with information from the original travel disclosure. You may use this to save time if you have multiple trips to disclose for the same Entity.

You will see the pop-up window displayed below. Review the certification statement then click the **Continue** button. If you need to make modifications, click the **Cancel** button and you will return to the travel disclosure screen.
Click the **Certify & Create New Travel Disclosure** button to certify that the information provided in the travel disclosure is accurate and submit for review, and also create a new, blank travel disclosure.

You will see the pop-up window displayed below. Review the certification statement then click the **Continue** button. If you need to make modifications, click the **Cancel** button and you will return to the travel disclosure screen.

Click the **Save** button to exit the travel disclosure and complete later for certification and review. When prompted by the pop-up window below, click the **Continue** button and you will return to the MY COI screen (Note: there is no **Cancel** button when saving). The Travel Disclosure will be saved to the **Revise** section of My COI.

To access the saved Travel Disclosure for modification and to certify for review, return to the My COI screen and click the **Travel Disclosure(s) in Progress** button under the **Revise** heading. Select the saved travel disclosure from the Edit section.

**Getting help**

**MIT Financial Conflicts Of Interest in Research**

**Conflict of Interest Officer**
- COI-help@mit.edu
- Questions about the Conflict of Interest Policy

**Coeus Support Team**
- Coeus-help@mit.edu
- CoeusLite My COI system issues and authorizations
- Include your **Name**, **Contact information**, and a brief description of the problem you are experiencing.