This guide is intended for all full-time and part-time faculty who participate in externally or departmentally funded research.
LOGGING IN

- In your preferred web browser, go to https://outsideactivity2.utsystem.edu/
- Enter your UTPB credentials and click Login
As a first time user you will need to answer 5 questions regarding your status as an employee with UTPB.

Since you are a researcher, you will answer YES on the first question.

1. I am involved in the design, conduct, or reporting of research.
2. I have a full-time appointment / I am employed full time.
3. I am a member of the faculty.
4. I have a 12 month appointment.
5. I am an exempt employee.

Employees who are exempt from the Fair Labor Standards Act (FLSA) and are, therefore, not entitled to overtime pay. Please consult with your HR office if you are unsure of your status.
Review the attached policy and acknowledge your understanding by checking the box and clicking Submit.
As a returning user you have the ability to re-acknowledge policies and re-answer status questions. This should be done every year to ensure you are up-to-date with UTPB policy and your reported employee status is true.

To re-acknowledge the policy:
1. From the home page click Re-Acknowledge the Policies
2. Click the hyperlink to review the policy. Once complete, check the box to acknowledge you have read the policy and click Submit.
To re-answer status questions:

1. From the home page click Re-Answer Status Questions

2. Follow the prompts to answer all five status questions (the 1st question is seen below)

For this purpose, “research” means any systematic investigation, study or experiment designed to develop or contribute to generalizable knowledge. The term includes both basic and applied research and product development, without regard to whether the research has external funding and, if externally funded, regardless of the funding source.
DECIDING YOUR NEXT STEP

- Use the chart to see which action fits your personal situation.
- The chart is intended to encompass any and all possible conflicts with your research specifically.

**Notes:**
- Teaching at another institution must have prior approval.
- "Compensation" not only applies to monetary types but also travel & expense reimbursements, registration fees, or any other type of payment you receive in relation to activities performed outside of the University.
- It is possible for you to need both approvals AND disclosures so be sure to read the criteria for both actions.

Request Approval

Make New Disclosure

Report No Activity
REQUEST APPROVAL

1. From the home page click Request Approval, then click Begin
2. Answer if this activity occurs during your appointment with UTPB
   
   ![Yes or No Options]

3. Choose what type of activity you are seeking approval for

   ![Activity Types]

   (Outside Employment / Other Compensated Activity, Service on Outside Board, Uncompensated Outside Activity)
REQUEST APPROVAL CONT.

4. For this example, Outside Employment was chosen. The next screen will list all items that are pre-approved; answer whether or not your activity is included in the pre-approved items.

Note: if your item does fit into the pre-approved category, you will not have to finish out the subsequent approval steps.

5. Answer whether or not you have entered the related organization into the portal before.
REQUEST APPROVAL CONT.

6. Enter all information related to the outside entity that you are involved with, then click Add Entity. At the top of the screen you will see a confirmation that your entity was added. Click Go to Next Section to continue.

7. The entity information will populate from the previous screen. Complete all other fields, then click Save Form. A progress notice will appear, click Go to Next Section to continue.
8. Complete all fields in the Intellectual Property section, then click Save Form. A progress notice will appear, click Go to Next Section to continue.
9. Complete all fields in the Time Form section, then click Save Form. A progress notice will appear, click Go to Next Section to continue.

**Note:**

- If you are entering an item with a past start date, whether for 2015 or 2016, you will need to click “Check here if you are requesting retrospective approval” and explain in the comment section what year the approval is for. See the screenshot to the right for a comment example.
10. Complete all fields in the Conflict of Interest/Conflict of Commitment section, then click Save Form. A progress notice will appear, click Go to Next Section to continue.
11. Complete all fields in the Compensation section, then click Save Form. A progress notice will appear, click Go to Next Section to continue.

**Notes:**

- “Compensation” not only applies to monetary types but also travel & expense reimbursements, registration fees, or any other type of payment you receive in relation to activities performed outside of the University.
- In Kind value is defined as being paid or given goods, commodities, or services instead of money.
12. In the Contract section, you may attach documentation if you wish to; click Save Form when complete. A progress notice will appear, click Go to Next Section to continue.
13. In the Requests Review Page you may read over each section and edit any as needed by clicking the button corresponding to the section you wish to edit. Once you have reviewed all sections, click Submit request Form.
14. The final screen is the Routing screen. In the box on the right enter the name of your direct supervisor; it should populate with their email address. Once the address is found, click Submit.

You and the approver will receive email confirmation of your submission.
MAKE NEW DISCLOSURE

1. From the home page click Make New Disclosure.

2. Select whom you are disclosing for from the menu. In this example, Spouse was chosen.
MAKE NEW DISCLOSURE CONT.

3. Enter the first and last name of your spouse, then click Next Section.
4. Choose which type of activity you are disclosing from the menu. In this example, Significant Interest in a Business Entity is chosen.
5. Answer whether or not you have entered the related organization into the portal before.

6. Enter all information related to the outside entity that you are involved with, then click Add Entity. At the top of the screen you will see a confirmation that your entity was added. Click Go to Next Section to continue.
MAKE NEW DISCLOSURE CONT.

7. Complete all fields in the General Form section, then click Save Form. A progress notice will appear; click Go to Next Section to continue.

8. Complete all fields in the Research Listing section, then click Save Form. A progress notice will appear; click Go to Next Section to continue.
9. Complete the Significant Interest section, then click Save Form. A progress notice will appear, click Go to Next Section to continue.

10. Complete the Time Form section, then click Save Form. A progress notice will appear, click Go to Next Section to continue.
   a. Note: the start date needs to coincide with the disclosure year you chose earlier.
11. Complete all fields in the Conflict of Interest section, then click Save Form. A progress notice will appear, click Go to Next Section to continue.
12. Complete all fields in the Compensation section, then click Save Form. A progress notice will appear, click Go to Next Section to continue.
13. In the Contract section you may attach documentation if you wish to; click Save Form when complete. A progress notice will appear; click Go to Next Section to continue.
14. In the Disclosure Review Page you may read over each section and edit any as needed by clicking the button corresponding to the section you wish to edit. Once you have reviewed all sections, click Submit Disclosure Form.

You should see a confirmation of submission on the next screen. No further action is required.
REPORT NO ACTIVITY

1. From the home page click Report No Activity

2. Choose which year you are reporting for as well as the option of having no approvals at this time, then click Report No Activity

You are confirming that you have no activity to report at this time.

You should review your institution’s policy below to confirm that you have no disclosures to report or requests that should be made at this time.

- Refer to: "CONFLICTS OF INTEREST, CONFLICTS OF COMMITMENT, AND OUTSIDE ACTIVITIES", Part III, Section 12, p. 63

☑ I have no disclosures to report for this year (2016).
☐ I have no disclosures to report for the prior year (2015).
☑ I have no approvals to request at this time

Report No Activity

You will see a confirmation of your response, no further action is needed
You may view items submitted by you and Review/Edit them by using the buttons on the right.

Home Screen – Employee Portal View

Employee Portal

Note: You may make new requests or disclosures, update existing forms, or change your status questions at any time during the year. Deadline for disclosure is 2019-02-01.
HAVE QUESTIONS?

- For policy and situational questions contact:
  - Doug Binnion – Compliance Manager (Binnion_d@utpb.edu, 432-552-3702)
  - Narita Holmes – Title IX Coordinator (holmes_n@utpb.edu, 432-552-2697)

- For portal use questions contact:
  - Jessica Luna – Training Coordinator (luna_j@utpb.edu, 432-552-4701)
  - Doug Binnion – Compliance Manager (Binnion_d@utpb.edu, 432-552-3702)
  - Narita Holmes – Title IX Coordinator (holmes_n@utpb.edu, 432-552-2697)