



OUTSIDE ACTIVITY PORTAL

ALL FACULTY & STAFF (NO EXTERNALLY OR DEPARTMENTALLY FUNDED RESEARCH)

This guide is intended for all full-time and part-time faculty and staff who do not 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



The screenshot shows the login page for The University of Texas of the Permian Basin (UTPB). At the top left is the UTPB logo, which consists of a black silhouette of a bird in flight above the letters 'UTPB' in a large, orange, outlined font. Below the logo, the text 'THE UNIVERSITY OF TEXAS OF THE PERMIAN BASIN™' is displayed in a smaller, black, sans-serif font. Underneath this text are two input fields: the first is labeled 'FalconID' and the second is labeled 'Password'. To the right of these fields are two links: '> Forgot your password?' and '> Need Help?'. At the bottom of the form is a red rectangular button with the word 'Login' in white text. This button is circled with a red oval.

HOME SCREEN - FIRST-TIME USER

Menu
Options

Home (Employee Portal) UT System Policy Library Help and Support Log Out

Welcome **Your Name**

The University of Texas of the Permian Basin **Outside Activity Portal**

[View Employee Portal](#) | [Request Approval](#) | [Make New Disclosure](#) | [Review Entities](#) | [Document Management](#) | [Report No Activity](#) | [Go to Approver Portal](#)

Status Questions and Policy Acknowledgement

Please indicate Yes or No for the following statements:

I am involved in the design, conduct, or reporting of research.

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.

Profile Enhancer | Reports | Document Management | Review Research | Legacy Outside Activity

Log Out

Initial Status
Questions &
Policy
Acceptance

STATUS QUESTIONS & POLICY ACKNOWLEDGEMENT – FIRST-TIME USER

- As a first time user you will need to answer 4 questions regarding your status as an employee with UTPB

Status Questions and Policy Acknowledgement

Please indicate Yes or No for the following statements:

I am involved in the design, conduct, or reporting of research.

YES

NO

For this purpose, "research" means any systematic investigation, study or experiment designed to develop or term includes both basic and applied research and product development, without regard to whether the research is funded, regardless of the funding source.

Please indicate Yes or No for the following statements:

I have a full-time appointment / I am employed full time.

YES

NO

Please indicate Yes or No for the following statements:

I am a member of the faculty.

YES

NO

Please indicate Yes or No for the following statements:

I am an exempt employee.

YES

NO

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.

STATUS QUESTIONS & POLICY ACKNOWLEDGEMENT – FIRST-TIME USER CONT.

- Review the attached policy and acknowledge your understanding by checking the box and clicking Submit

Status Questions and Policy Acknowledgement

Please review and acknowledge that you have read the following:

(make sure your browser allows pop ups)

- No policy documentation has been provided by your institution

I hereby affirm that I have read and understood the above policies.

Submit

These were your answers:

- I have a full-time appointment / I am employed full time.....YES
- I am a member of the faculty.....NO
- I am an exempt employee.....YES

HOME SCREEN – RETURNING USER

Menu
Options

Log Out

Home (Employee Portal) UT System Policy Library Help and Support Log Out

Welcome **Your Name**
The University of Texas of the Permian Basin **Outside Activity Portal**

View Employee Portal Request Approval Make New Disclosure Review Entities Document Management Report No Activity Go to Approver Portal

Announcement
The Annual Research Disclosure Period is currently ongoing. If you have nothing to disclose, please click [here](#). Otherwise, please select "Make a New Disclosure" from the menu above.
Deadline: All disclosures for calendar year 2015 must be submitted on or before March 31, 2016. As of April 1, 2016, no further 2015 disclosures will be accepted, and all submitted 2015 disclosures will be automatically finalized, which means they cannot be edited after that point.

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 disclosures: April 1

Requests

REQ_ID	Activity	Entity Name	Status	Action Desk	Last Update	Action
217	Outside Employment / Other Compensated Activity	Sonic Drive - In	SUBMITTED	Doug Binnion	2016-02-08	Review/Edit
216	Outside Employment / Other Compensated Activity	Sonic Drive - In	INCOMPLETE		2016-02-08	Review/Edit

Acknowledgement
You last acknowledged that you had read and understood the policies on:
2016-02-08 09:45:53
[Re-Acknowledge the Policies](#)

Disclosures
Here are the disclosures you have reported so far

DISC_ID	Activity	Relationship	Entity Name	Status	Last Update	Action
179	Significant Interest in a Business Entity	SpousePartner	John's Lawn Service	SUBMITTED	2016-02-08	Review/Edit

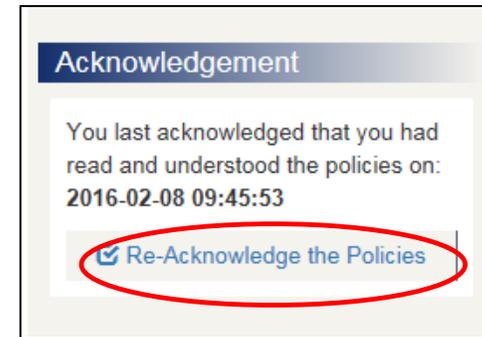
Status
Your last response indicated the following on:
2016-02-08 09:16:29
• I have a full-time appointment:
YES

Past/Existing
Approval
Requests &
Disclosures

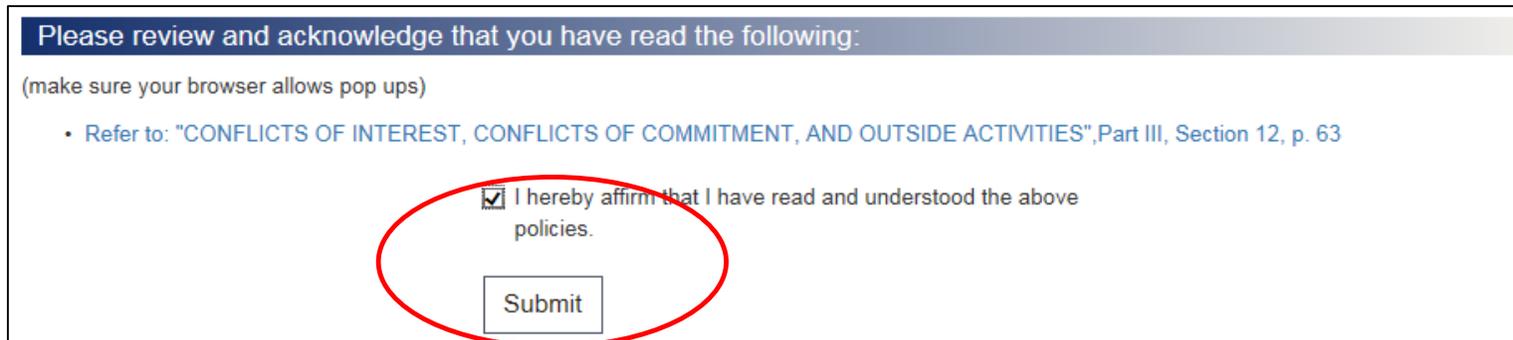
Past
Acknowledgements
& Status
Questions

STATUS QUESTIONS & POLICY ACKNOWLEDGEMENT – RETURNING USER

- 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

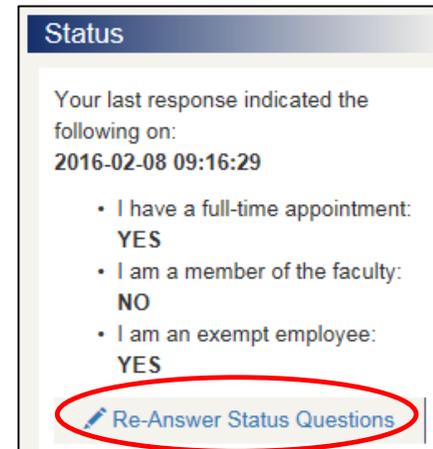


2. Click the hyperlink to review the policy. Once complete, check the box to acknowledge you have read the policy and click Submit.

A screenshot of a web interface titled "Please review and acknowledge that you have read the following:". Below the title is a note: "(make sure your browser allows pop ups)". A bullet point lists a policy: "Refer to: 'CONFLICTS OF INTEREST, CONFLICTS OF COMMITMENT, AND OUTSIDE ACTIVITIES', Part III, Section 12, p. 63". Below the list is a checkbox with the text "I hereby affirm that I have read and understood the above policies." and a "Submit" button. Both the checkbox and the button are circled in red.

STATUS QUESTIONS & POLICY ACKNOWLEDGEMENT – RETURNING USER CONT.

- To re-answer status questions:
 1. From the home page click Re-Answer Status Questions



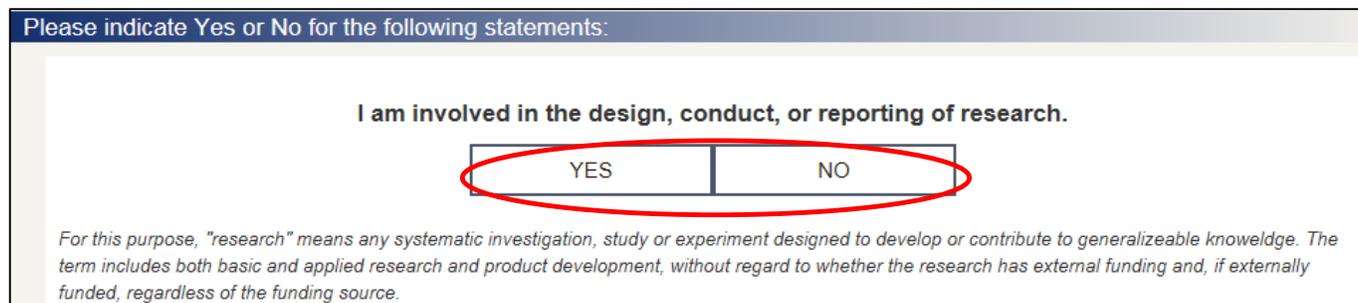
Status

Your last response indicated the following on:
2016-02-08 09:16:29

- I have a full-time appointment:
YES
- I am a member of the faculty:
NO
- I am an exempt employee:
YES

[Re-Answer Status Questions](#)

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



Please indicate Yes or No for the following statements:

I am involved in the design, conduct, or reporting of research.

YES NO

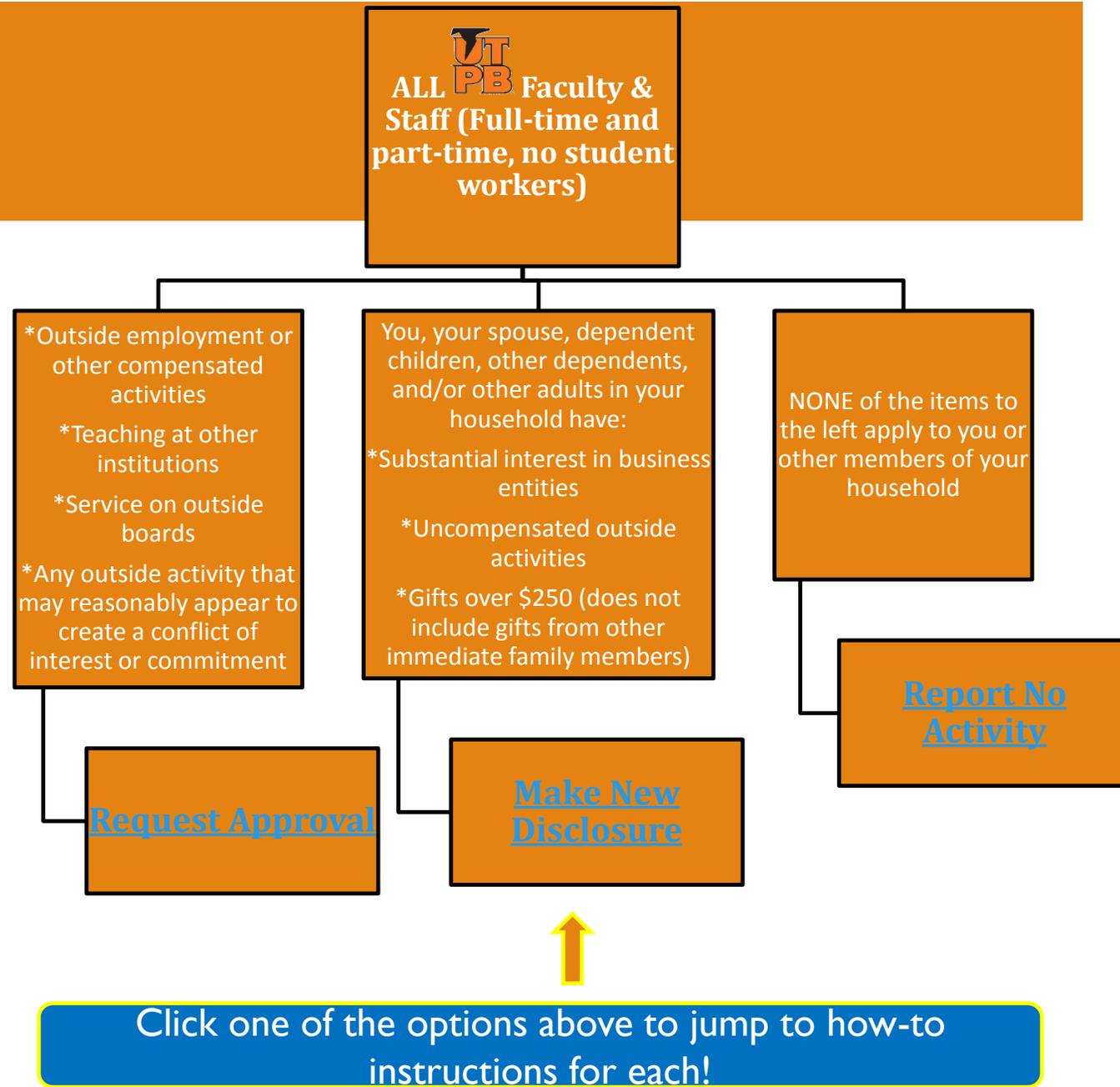
For this purpose, "research" means any systematic investigation, study or experiment designed to develop or contribute to generalizable knowledge. The term includes both basic and applied research and product development, without regard to whether the research has external funding and, if externally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

DECIDING YOUR NEXT STEP

- Use the chart to see which action fits your personal situation.

**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

1. From the home page click Request Approval, then click Begin
2. Choose what type of activity you are seeking approval for 

What type of activity are you seeking approval?

Outside Employment / Other Compensated Activity

Service on Outside Board

Uncompensated Outside Activity

3. 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.

Please answer the following:

The University of Texas of the Permian Basin considers the following *pre-approved*:

- Serving on a federal, state, or local government agency committee, panel, or commission
- Acting in an editorial capacity for a professional journal
- Reviewing journal manuscripts, book manuscripts, or grant or contract proposals
- Attending and presenting talks at scholarly colloquia and conferences
- Developing scholarly communications in the form of books or journal articles, reviews, movies, television productions, and similar works, even when such activities result in financial gain, consistent with intellectual property and other applicable UT System and UTPB policies and guidelines
- Serving as a committee member, an officer, or board member of a professional or scholarly society.
- Serving as a board member or volunteer for a community or regional organization.
- Providing expert testimony, consulting services, professional/clinical practice, and serving on a board of directors.

Is your activity in your institution's pre-approved activity list displayed above?

YES

NO

[Back to Chart](#)

REQUEST APPROVAL CONT.

4. Answer whether or not you have entered the related organization into the portal before.



Please answer the following:

Have you entered the related entity/organization in this online portal before?

YES NO

Please note, as of October 2015, data did not migrate from the previous COI System, therefore you may need to re-enter your entity information. You can check by using the [Review Entities](#) menu option (opens in a new tab).

5. 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.



Enter a New Entity

Entity Country:

Employer Organization Name:

Street 1:

Street 2:

City:

State:

Zip Code:

Province (if foreign Address):

Mail Code (if foreign Address):

Organization Type:

Select Industry:

If Other:

REQUEST APPROVAL CONT.

6. 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.



Your Entity: Sonic Drive - In

Is this activity related to your University of Texas responsibilities? Yes No

Type of Duties: Retail

If Other, please enter duty type:

Briefly describe duties:

Save Form

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



Intellectual Property

Does this activity relate to any intellectual property owned by the UT institution? Yes No

If you answered yes above, please explain:

Please indicate the likelihood that intellectual property will result from this activity: Not at all likely Somewhat likely Very likely

Save Form

REQUEST APPROVAL CONT.

8. 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.

Retrospective approval - In general, prior approval is required before engaging in this type of outside activity. However, there are some activities the nature of which is such that they cannot be specifically approved before the work must begin. Examples might include consulting on an emergency or other urgent need.

Check here if you are requesting retrospective approval of such an activity.

Please briefly explain the circumstances:

Estimated Number of hours of service: Hours per:

Start Date:

Check here if your activity is ongoing and does not have an end date Or, enter an End Date:

Will this require some time during your normal working hours at UT? Yes No

If required by your institution, estimate the number of hours of paid time off you will need per month for this activity:

Additional Comments:

REQUEST APPROVAL CONT.

9. 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.

Conflict of Interest - a significant outside interest of a UT employee or one of the employee's immediate family members that reasonably appears to be related to the employee's institutional responsibilities and that could directly or indirectly significantly affect the employee's performance of those responsibilities. Although not exclusively, this is most often related to money.

Do you feel this activity may create or may reasonably appear to create a *conflict of interest*? Yes
 No

Please elaborate:

Conflict of Commitment - a state in which a UT employee's activities on behalf of an outside association, or an activity, that could directly or significantly interfere with the employee's fulfillment of their institutional responsibilities. This is primarily an issue of time.

Do you feel this activity may create or may reasonably appear to create a *conflict of commitment*? Yes
 No

Please elaborate:

Save Form

REQUEST APPROVAL CONT.

10. 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.

Will this activity be compensated? Yes
 No

If you answered "Yes" above, provide estimated compensation for this calendar year from this Employer/Organization by type.
Please enter amounts as whole numbers with no dollar signs or commas. Enter equity in whole percentages.

Cash of other equivalent:

Travel/Expense Reimbursements:

In Kind value:

Fully diluted value of the company at the time of grant or the equity:

Type of equity:

If you selected "Other" describe the type of equity:

Optional comments about estimated compensation:

REQUEST APPROVAL CONT.

II. 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.

Your institution may require supporting documentation for the entity that states, at minimum, the dates of employment and the amount of annual compensation. This documentation can be uploaded here.

Would you like to include a document? Yes
 No

If you have any agreements or contracts related to this activity or interest, please attach them below. These documents will be reviewed along with your request, and *your request may not be able to be finalized until the documents are reviewed*. Please either select the appropriate document from the list below or upload a new document using your [Document Management Utility](#). You may need to hit refresh to display a newly added document once you return from the Document Management Utility

Select	Doc ID	File Name	Description	Upload Date
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Optional Comments:

Save Form

REQUEST APPROVAL CONT.

12. 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.

Requests Review Page *Outside Employment / Other Compensated Activity*

Action Tool Bar

If your form is in a CLONED, SAVED, RECALLED or RETURNED status, you may edit and save individual sections below under the section headings. When you are finished reviewing or editing, you can choose one the following actions that are available:

[Submit request Form](#) [Delete request Form](#) [Clone Request Form](#)

General Section

REQ ID#: 217
Status: SAVED
Activity: *Outside Employment / Other Compensated Activity*

Entity Information

Entity Country: United States of America
Entity Name: Sonic Drive - In
Street 1: 3514 Andrews Hwy.
Street 2:
City: Odessa
State: Texas
Zip Code: 79762
Province:
Mail Code:
Entity Type: For Profit Industry - Publicly Traded
Industry: Accommodation and Food Services

Duties

Duty Type: Retail
Briefly describe duties: Deliver food/drinks to customers and handle their change for the transaction. Assist in daily cleaning and closing duties.

Research/Intellectual Property

Are you using any intellectual property owned or licensed by this entity in your research?
If yes, explain:
Does this activity relate to any intellectual property owned by the UT institution? N
If yes, explain:
Likelihood that intellectual property will result from this activity: Not at All

[Edit and Save Intellectual Properties Section](#)

Time Form Section

Requesting retroactive approval: N/A
Retroactive justification (if applicable):
Start Date: 2016-02-08
End Date: No end date
Is this ongoing? Y
Estimated Numbers of hours of service: 10
Time Frequency: Weekly

REQUEST APPROVAL – FINAL SCREEN!

13. 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.

<p>You are about to route the following activity:</p> <ul style="list-style-type: none">• Activity Type: Request for OutsideEmp• Entity Name:• REQ_ID: 217 <p><i>If you cannot find the person you want to route to in the system, they may not have logged into the portal yet.</i></p>	<p>Please search for the person you would like to route to by typing in their name and selecting their email address from the generated pulldown menu (green indicates it is a valid address):</p>	<input data-bbox="1312 833 1829 868" type="text" value="Doug B"/> <input data-bbox="1312 873 1829 921" type="text" value="Doug Binnion-binnion_d@utpb.edu"/> <input data-bbox="1312 926 1439 973" type="button" value="Submit"/>
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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.

Disclosure Form. Before we begin...

- A disclosure is generally about activities that have already occurred or interests that already exist
- There are activities/interests that may need to be disclosed that do not require prior approval
- We will ask you a few questions first to determine whether or not you need to disclose an item

Please select one of the options below

I am disclosing for:

Myself	Spouse	Other Financial Dependent
Other Individual with Joint Financial Interests	Other Adult in Household	Dependent Child or Step Child

[Back to Chart](#)

MAKE NEW DISCLOSURE CONT.

3. Enter the first and last name of your spouse, then click Next Section.

Please enter the first name and last name of Spouse:

First Name:

Last Name:

MAKE NEW DISCLOSURE CONT.

4. Choose which type of activity you are disclosing from the menu. In this example, Significant Interest in a Business Entity is chosen.

Please select one of the following:

What type of activity are you disclosing for?

Outside Employment / Other Compensated Activity
Significant Interest in a Business Entity
Gifts
Service on Boards
Uncompensated Outside Activity

MAKE NEW DISCLOSURE CONT.

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



Please answer the following:

Have you entered the related entity/organization in this online portal before?

YES	NO
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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.



Enter a New Entity

Entity Country:	United States of America
Employer Organization Name:	John's Lawn Service
Street 1:	123 Washington Ln.
Street 2:	Enter Street Address
City:	Odessa
State:	Texas
Zip Code:	79762
Province (if foreign Address):	Enter City
Mail Code (if foreign Address):	Enter City
Organization Type:	For Profit Industry - Non-Publicly Traded
Select Industry:	Other
If Other:	Lawn Care Service
Add Entity	

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.



Your Entity: John's Lawn Service

Is this related to your institutional responsibilities? Yes No

For what year are you Disclosing 2016

Save Form

8. Complete the Significant Interest section, then click Save Form. A progress notice will appear; click Go to Next Section to continue.



What is the Significant Interest?
Check all that apply.

- Service as an officer
- A controlling interest
- Ownership of more than 10% of the voting interest
- Ownership of more than \$5,000 of the fair market value
- Participating interest in more than 10% of profits, proceeds, or capital gains

Save Form

MAKE NEW DISCLOSURE CONT.

9. Complete the Time Form section, then click Save Form. A progress notice will appear, click Go to Next Section to continue.

Note: the start date needs to coincide with the disclosure year you chose earlier.



Please answer when you began to have an interest in this business entity. Additional comments are optional.

Start Date:

Additional
Comments:

10. 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.



Conflict of Interest - a significant outside interest of a UT employee or one of the employee's immediate family members that reasonably appears to be related to the employee's institutional responsibilities and that could directly or indirectly significantly affect the employee's performance of those responsibilities. Although not exclusively, this is most often related to money.

Do you feel this activity may create or may reasonably appear to create a conflict of interest? Yes
 No

If you answered yes, please elaborate:

Conflict of Commitment - a state in which a UT employee's activities on behalf of an outside association, or an activity, that could directly or significantly interfere with the employee's fulfillment of their institutional responsibilities. This is primarily an issue of time.

Do you feel this activity may create or may reasonably appear to create a conflict of commitment? Yes
 No

If you answered yes, please elaborate:

Has a Conflict Management Plan been put into place? Yes
 No
 Not Applicable
Answer "Not Applicable" if you answered No to the questions above.

MAKE NEW DISCLOSURE CONT.

II. 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.

Your institution may require supporting documentation for the entity that states, at minimum, the dates of employment and the amount of annual compensation. This documentation can be uploaded here.

Would you like to include a document? Yes No

If you have any agreements or contracts related to this activity or interest, please attach them below. These documents will be reviewed along with your request, and *your request may not be able to be finalized until the documents are reviewed.* Please either select the appropriate document from the list below or upload a new document using your [Document Management Utility](#). You may need to hit refresh to display a newly added document once you return from the Document Management Utility

Select	Doc ID	File Name	Description	Upload Date
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Optional Comments:

Save Form

MAKE NEW DISCLOSURE – FINAL SCREEN

12. 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.

Disclosure Review Page - Significant Interest in a Business Entity (Spouse or Partner)

Action Tool Bar

If your form is in a CLONED, SAVED, RECALLED or RETURNED status, you may **edit and save** individual sections below under the section headings.

When you are finished reviewing or editing, you can choose one the following actions that are available:

By clicking submit, I certify that the information contained in this disclosure form is complete and accurate, and further that the individual submitting this form is the individual on this form.

[Submit Disclosure Form](#) [Delete Disclosure Form](#) [Clone Disclosure Form](#)

General Section

DISC ID#: 179
Status: SAVED
Activity: Significant Interest in a Business Entity
Relationship: Spouse or Partner

Entity Information

Entity Country: United States of America
Entity Name: John's Lawn Service
Street 1: 123 Washington Ln.
Street 2:
City: Odessa
State: Texas
Zip Code: 79762
Province:
Mail Code:
Entity Type: For Profit Industry - Non-Publicly Traded
Industry: N/A Lawn Care Service

Duties (if applicable)

Significant Interest in Business Entity

Service as an officer: Y
A Controlling Interest: Y
Ownership of more than 10% of voting interest: Y
Ownership of more than \$5000 of the fair market value: Y
Participating Interest in more than 10% of profits, proceeds or capital gains: Y

[Edit and Save Significant Interest In Business Entities Section](#)

Time Form Section

Start Date: 2016-01-01
End Date:
Estimated Numbers of hours of service:
Time Frequency:
Did any portion of activity occur during

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

You will see a confirmation of your response, no further action is needed

[Back to Chart](#)

VIEWING SUBMITTED APPROVAL REQUESTS & DISCLOSURES

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 disc

Requests

REQ_ID	Activity	Entity Name	Status	Action Desk	Last Update	Action
217	Outside Employment / Other Compensated Activity	Sonic Drive - In	SUBMITTED	Doug Binnion	2016-02-08	Review/Edit
216	Outside Employment / Other Compensated Activity	Sonic Drive - In	INCOMPLETE		2016-02-08	Review/Edit

Disclosures

Here are the disclosures you have reported so far

DISC_ID	Activity	Relationship	Entity Name	Status	Last Update	Action
179	Significant Interest in a Business Entity	SpousePartner	John's Lawn Service	SUBMITTED	2016-02-08	Review/Edit

You may view items submitted by you and Review/Edit them by using the buttons on the right

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)