



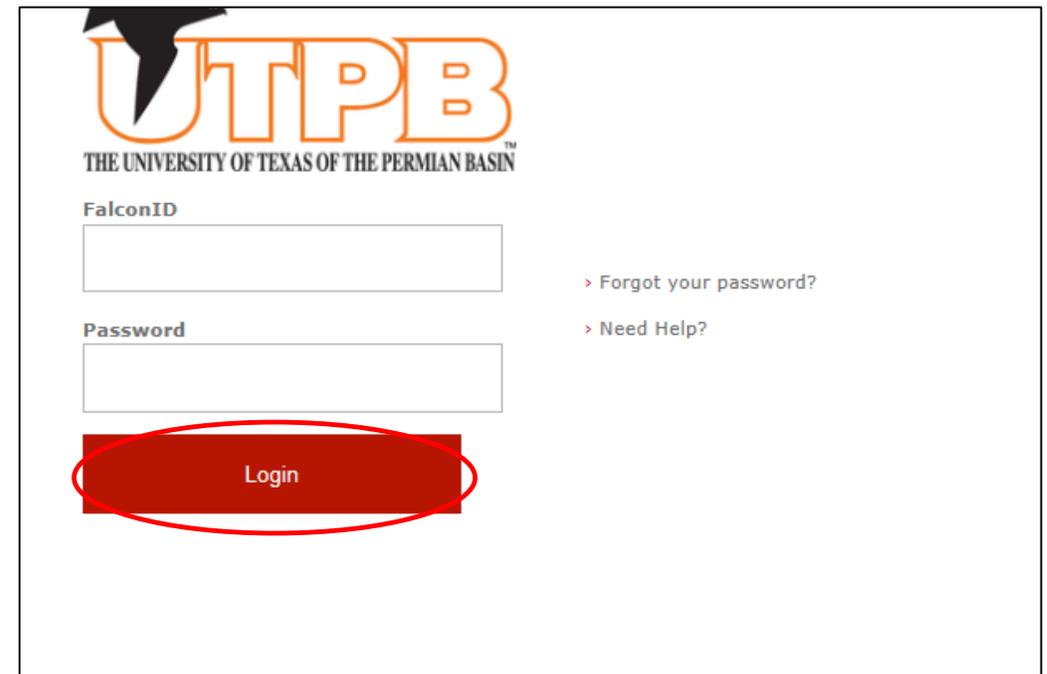
OUTSIDE ACTIVITY PORTAL

APPROVER

This guide is intended for all faculty and staff who are involved in the conflict of interest/commitment approval chain of command.

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 interface for The University of Texas of the Permian Basin (UTPB). At the top left is the UTPB logo, which consists of a stylized black silhouette of a bird or wing above the letters 'UTPB' in a bold, 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. The login form contains two input fields: 'FalconID' and 'Password', both with white backgrounds and thin grey borders. To the right of these fields are two links: '> Forgot your password?' and '> Need Help?'. At the bottom of the form is a prominent red button with the word 'Login' in white text, which is circled in red.

ACCESSING APPROVER PORTAL

1. From the home screen click 

2. Approval Portal statuses

- a. Approvals Needing Your Action – items awaiting your review and action
- b. Pending Final Approval – items that you have approved but have not yet reached a final status (have not travelled up the approver hierarchy)
- c. Final Approved/Final Acknowledged – items that you have reviewed and approved which have also reached a final status. This section could also include records that were deactivated or withdrawn by the employee

Approver Portal

Approvals Needing Your Action

Here are the items awaiting your review and action.

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
REQ218	NO (180)	Outside Employment / Other Compensated Activity	Jessica Luna	Sonic Drive - In	SUBMITTED	2016-02-10 14:53:18	

Pending Final Approval

Items you approved but that have not yet reached a final status. There are not pending your action, but you can view this activity's history and recall its form or rescind approval by clicking on the "View" button

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
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Final Approved / Final Acknowledged

Items you reviewed that have reached final status at some point. May also include records that were deactivated or withdrawn by the user after final approval/acknowledgement. There are not pending your action, but you can view this activity's history and recall its form or rescind approval by clicking on the "View" button.

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
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REVIEWING ITEMS

1. Under Approvals Needing Your Action, click Review
 - a. You will see the Requests Review Page which includes all details of the request submitted by your employee on the left and your actions on the right in green. There are instructions at the top that coincide with your role in the approver chain.
2. Complete all fields in the Approver Actions section on the right

Requests Review Page - *Outside Employment / Other Compensated Activity*

About The Requester

Name: Jessica Luna
Email: luna_j@utpb.edu
Department:
Research? Is a Researcher [Click here for 360 View](#)

General Section

REQ ID#: 218
Status: SUBMITTED
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: Deliver food/drinks to customers and handle their

Approver Actions

Before we begin

- If you are the first person in the approval chain, please fill out the entire form below.
- If you are a subsequent person in the approval chain, review your predecessor's contents below, *edit as appropriate* and submit.
- If you need to return the form for edits, skip to the bottom of the form provide an explanatory message for the recipient, and under "Please Select an Action" choose "Return for Edits" and submit.
- If you are not an appropriate approver for this request, skip to the bottom of the form, provide an explanatory message to the recipient, under "Please Select an Action" choose this "I should not have received this."
Note: Selecting "I should not have received this" indicates the form was sent to you in error and completely removes you from the approval chain.

Approval Form

Is this activity of benefit to the institution? Yes No

Do you approve the use of university time, within the limits of your institution's policy for this activity? Yes No N/A

Is this related to the individuals institutional responsibilities? Yes No

Please elaborate:

Could this activity appear to present a conflict of Yes No

REVIEWING ITEMS – CONT.

3. Select an action from the drop-down menu and add comments for the next person in the approver chain

- a. Note: the approval must follow the organizational chart all the way to the President so keep that in mind when choosing an action. If you are routing to another person, you will enter their name in the box that appears.

4. Click Submit Form

- a. You will see a confirmation of your action at the top of the green section. The approval has now been routed to the next person and you will see it under Pending Final Approval in the Approver Portal.

The screenshot shows a web form with two main sections: 'Research/Intellectual Property' and 'Time Form Section'. The 'Research/Intellectual Property' section contains three questions with radio button options. The 'Time Form Section' contains several fields for dates, frequency, and comments. To the right of these sections is a green sidebar containing an 'Optional-Upload Management Plan File' section with a 'Browse...' button, a 'File Description' field, a 'Please Select an Action:' dropdown menu (with 'Please Select an Option' selected), a 'Provide General Comments / Message Recipient (required):' text area, and a 'Submit Form' button circled in red. At the bottom of the sidebar is a 'History' section showing a submission record for Jessica Luna-luna_jj@utpb.edu on 2016-02-10 14:53:18.

Research/Intellectual Property	
Research (if applicable): Are you using any intellectual property owned or licensed by this entity in your research?	N/A
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

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
Will this require some time during your normal working hours at UT?	N
Additional comments:	

Optional-Upload Management Plan File (PDF or Docx only): Browse...

File Description:

Please Select an Action: **-- Please Select an Option --**
I Approve, but need to route to another Approver
I Do Not Approve
Return to an Approver for Edits/More Information
Return to the original Requester for Edits
I Should Not Have Received This
I Final Approve this Request

Provide General Comments / Message Recipient (required):

Submit Form

History

Jessica Luna-luna_jj@utpb.edu **SUBMITTED** on 2016-02-10 14:53:18.
SENT TO Jessica Luna-luna_jj@utpb.edu

APPROVAL PORTAL VIEW – BEFORE & AFTER

Before Your Action

Approver Portal

Approvals Needing Your Action

Here are the items awaiting your review and action.

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
REQ218	NO (180)	Outside Employment / Other Compensated Activity	Jessica Luna	Sonic Drive - In	SUBMITTED	2016-02-10 14:53:18	Review

Pending Final Approval

Items you approved but that have not yet reached a final status. There are not pending your action, but you can view this activity's history and recall its form or rescind approval by clicking on the "View" button

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
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Final Approved / Final Acknowledged

Items you reviewed that have reached final status at some point. May also include records that were deactivated or withdrawn by the user after final approval/acknowledgement. There are not pending your action, but you can view this activity's history and recall its form or rescind approval by clicking on the "View" button.

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
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After Your Action

Approver Portal

Approvals Needing Your Action

Here are the items awaiting your review and action.

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
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Pending Final Approval

Items you approved but that have not yet reached a final status. There are not pending your action, but you can view this activity's history and recall its form or rescind approval by clicking on the "View" button

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
REQ218	NO (180)	Outside Employment / Other Compensated Activity	Jessica Luna	Sonic Drive - In	APPROVED	2016-02-10 15:25:55	View

Final Approved / Final Acknowledged

Items you reviewed that have reached final status at some point. May also include records that were deactivated or withdrawn by the user after final approval/acknowledgement. There are not pending your action, but you can view this activity's history and recall its form or rescind approval by clicking on the "View" button.

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
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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)