Electronic Outside Activity Form
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Electronic Outside Activity Form

Each row entered in questions 3 and 4 of your disclosure will, typically, require the additional step of submitting an electronic Outside Activity (OA) form by using the **Create or Associate OA Form** link in column 5. This is a dynamic link and will change to Draft or Submitted depending upon which button you have selected from within the OA form. All OA forms are tied to their specific disclosure form.

If you believe the activity you are reporting on a particular row does not require the filing of an OA, we recommend that you first **confirm this with your Supervisor before proceeding** with the rest of the disclosure as once you submit the disclosure form you will need to resubmit another one if you need to fill out an OA.

Once your disclosure has gone through the entire review process the link will change to either Approved or Denied and your reviewed OA form(s) will be viewable via the Conflict of Interest Welcome Page.
Creating an Electronic Outside Activity Form

1) Enter the applicable information in columns 1 through 4 and then click on the Create or Associate OA Form link.

The Outside Activity Forms window will open

2) Click on Add a New Outside Activity Form button.
3) In order to submit the (OA) form you will need to do the following;

a. enter information in all of the required fields
b. click on the checkbox at the bottom of the form (this is your electronic signature)
c. Click on the Submit OA Form button (you may also select Save Draft however you will need return to it and use the Submit OA button before you may submit your disclosure).

NOTE:
- Supervisor's Name field - If the person listed in the field is not your supervisor, please use the Other Supervisor list of values to select the correct person.
- OA End Date - If the End Date is unknown, please enter a date one year past the Start Date.

Reminder: We recommend that you print the OA form and review it with your supervisor before submitting your Conflict of Interest form. Once you have submitted your disclosure, you can no longer make changes to this Outside Activity form. You will need to resubmit a new one and it will have to go through entire approval process again.
The confirmation message will appear

4) Click on the Cancel/Back button.

The Outside Activity Forms summary window will open

5) Click on the Cancel/Back button to return to Question on the COI disclosure form.

If you selected the Submit OA button, the link in column 5 will have changed to Submitted and you are ready to add additional rows for this question (and submit another OA for that new row) or proceed through the remainder of the disclosure questions in order to finalize the Conflict of Interest process.

If you selected the Save Draft button, the link will have changed to Draft. You cannot submit your Conflict of Interest disclosure form if you have an OA with a status of Draft.

6) If you have other activities to report for this question, add another row and follow steps 1 through 6. If not, you may move to the next question.
Associating an Existing Outside Activity Form to another Row

It is possible that you will report the same activity on both questions 3 and 4. If you have already submitted an electronic OA on question 3, and the activity you are reporting on question 4 is the same, you may use this feature to associate this new row with the existing OA form.

**Note:** We recommend confirming this with your supervisor before associating an existing online OA form with another row.

1) Enter the applicable information in columns 1 through 4 and then click on the **Create or Associate OA Form** link.
The Outside Activity Forms summary window will open

Notice that the Outside Activity Forms summary window now has 2 sections:

Outside Activity Forms Submitted for Current Answers (top section)

This section will display the OA form related to the current row you are on (the row from which you selected the Create or Associate OA Form link). In this example, it will remain empty until you create an OA or use the association feature.

Outside Activity Forms Previously Submitted (Includes Drafts Entered) (bottom section)

This section will display all of the OA’s that you have entered (both submitted and draft OA’s) for either questions 3 or 4 for that specific disclosure form. In this example an OA was previously created for Question 3 row 1.

2) Check the box for the OA you would like to associate for the new row and click on the Associate Selected OA With Current Answer button.
3) Click on the OK button.

4) Click on the Cancel/Back button to be returned to Question 4 of the disclosure.

The OA form is now associated with Question 3 row 1 and Question 4 Row 1 and it is now listed in the Outside Activity Forms Submitted for Current Answer (which is Question 4 row 1).
Viewing an Electronic Outside Activity Form for a Submitted Disclosure

Once you have submitted your Conflict of Interest disclosure form a View OA link will be available on the Welcome page. The Supervisor/Pre-Reviewer and the Campus Human Resources Approval sections will not have any information in them until the Outside Activity form has been reviewed by those individuals.

1) Click on the View OA link next to a disclosure within the Submitted Disclosures section of the Welcome page.
The Outside Activity Agreements Summary window will open

There are 3 Outside Activity forms associated with this disclosure.

1) Click on the Magnifying glass icon next to the OA you would like to view.

**NOTE:** Once you have opened the OA you may scroll down to the bottom of the form to view/print the comments and decisions entered by your Supervisor/Previewer and the Human Resources Reviewer.

The Outside Activity form will open
Deleting an Outside Activity Form

An OA form may be deleted if a previously reported Outside Activity no longer applies or if you have previously submitted an OA form that was later not approved by HR (the link will have the status of Denied).

Deleting an OA form is a 3-step process;

- You must first delete the row association and then delete the OA itself (both done via the Outside Activity Form summary window)
- You must delete the row on the disclosure form (assuming the activity no longer applies)

1) From the COI Welcome page, click on the New Disclosure (or Resume Disclosure) button.

2) Scroll to the question that has the OA form you would like to delete. For this example I will delete an OA (and the row associated with it) that has been denied.

3) Click on the Denied link.

The Outside Activity Forms summary window will open

4) Select the row within the Outside Activity Forms Submitted for Current Answer section (top section of window) and click on the Delete Selected Association button.
5) Click on the **OK** button.

6) Notice that the row no longer appears in the upper section and the associated row information no longer has data.

7) Click on the **Edit** icon in the row of the OA you would like to delete.
The Request For Outside Activity form will open.

**Reminder:** You cannot delete an OA form if it is associated with any rows on your disclosure form. You must first remove all associations.

8) Click on the **Delete** button.

9) Click on the **OK** button.

10) Click on the **Delete** button.

Notice that the link has now changed from *Denied* to *Create or Associate OA Form*.
Additional Information for the Outside Activity Form

Submitting a Disclosure to Report Newly Acquired Interests during the same COI Cycle

As the case with the Conflict of Interest disclosure form, if you create a new disclosure during the same COI cycle, the answers entered on your previously submitted disclosure along with your reviewed Outside Activity forms (with a status of Approved or Denied) will be auto-populated in the disclosure.

If you are reporting newly acquired interests, and nothing has changed for the activities that were previously reported and reviewed for questions 3 and 4, the OA approvals are still applicable and you only need to enter your new interests.

Changes to a previously Submitted and Approved OA

If you create a new disclosure and make a change to an existing Approved OA, the link will automatically reset to Submitted and the OA will have to go through the entire review again. The only exception is if the change is to enter a supervisor in the Other Supervisor field.

An OA Form that has been Denied

If you have an OA form that has been denied, we recommend that you speak with your supervisor to discuss how to resolve the matter. You can either click on the link, make the necessary changes to the OA and then resubmit your disclosure form or you can delete the OA entirely, and the corresponding row, and resubmit your disclosure form.

Annual Outside Activity Reporting Requirement

A new Outside Activity form must be submitted annually. At the beginning of every new COI cycle, OA’s that previously had the status of either Approved (or Denied) will be reverted back to the status of Submitted. If the activity listed is still ongoing, and all of the information previously entered is still applicable, you will need to extend the Activity End Date to a new one (if unknown, enter a date one year past the previously submitted OA) and check on the box at the bottom of the page to acknowledge your new electronic signature.