UT System Outside Activity Portal Tool Tip Training

ACCESSING THE OUTSIDE ACTIVITY PORTAL & GETTING HELP
The Tool Tip Training

• What will be covered:
  – How to access and use the online application
  – Overview of the various components, including tool tips and some definitions/explanations on how the application works
    • Request Form
    • Disclosure Form
    • Employee Portal
    • Approver Portal
  – Appendix of what the various actions do and when you can use them

• What will not be covered: This is not policy training. Policy training is covered separately.
About the Outside Activity Portal

• Purpose: to provide employees a way to electronically request approval and make necessary disclosures for outside activities
• Entering the system is NOT required of all employees
• If you do not have a request to make or activity to disclose, you may not have to enter the system at all, unless you need to approve the request of someone else
ACCESSING THE OUTSIDE ACTIVITY PORTAL & GETTING HELP
Accessing the Outside Activity Portal

- [http://outsideactivity.utsystem.edu](http://outsideactivity.utsystem.edu)
- Best viewed with Internet Explorer (at least version 9)
- Should work with Chrome (version 32.) and Safari (version 7.0.1)
- Full functionality may be missing in Firefox
- Does NOT work on iPad or Android Tablet
- The application sends out automatic email notifications at certain points in the process. Please add [notification@utsystem.edu](mailto:notification@utsystem.edu) to your safe senders list
- If you have any questions, please use the Help link at the top right of your screen
Accessing the Outside Activity Portal

- When you click the http://outsideactivity.utsystem.edu URL, you are taken to this page
- You can search for your organization
- **OR**
- Select it from the dropdown menu
- From here you will go to your institution’s log in page. You will sign in using your normal network credentials.

**Tool Tip!**
You can tell the system to remember your institution for up to a week. Then it will automatically direct you to your institution’s log in page.

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The Home Portal

- Once you have logged in, you will come to the “UT System Outside Activity Portal.”
- From here, you can make a new request for approval or make a new disclosure. More on those below.
- Or you can go to your Employee Portal which allows you to see the status of and/or access existing requests or disclosures. There are other actions available from the Employee Portal that will be covered in that section of the training.
- The Approver Portal is where you go to see any requests that have been sent to you that need your action. The Approver Portal is covered in more detail in that section of the training.

UT System Outside Activity Portal

REQUEST APPROVAL

MAKE A DISCLOSURE

EMPLOYEE PORTAL

APPROVER PORTAL

Tool Tips!
This page with the icons is also referred to as the “Home Portal.”
HELP

• A “Help” link is located in the top right of every page of the application

• Instructions and tool tips on different aspects of the application are available. Please review these to see if your question is addressed.

• If not, you can submit a Support Request Form will appear. All fields are required.

• Once the user selects “Submit”, he/she will be taken to a Thank You page with the following language “Your request has been received.”

• For technical issues, users will receive a response within 24 business hours.

• As you move through the application you may receive an error similar to “SAS Stored Process Error”. In most cases, the best solution is to close your browser and then re-enter the application. “Save Early. Save Often.” is your best defense.
New Users

The first time you log in to the portal, and you select Request Approval, Make a Disclosure, or Employee Portal, you will be directed to the Welcome, New User screen.

You will need to answer a few questions, as well as read and acknowledge the policy.

NOTE for Approvers: Selecting the Approver Portal button does not trigger the New User event. Only when you select one of the other three for the first time will you trigger the New User event.
You must answer a few questions about your employment status the first time you log in to the portal as a new user.

Your answers to these questions determine the reporting requirements for you and tell the application how to process your requests and disclosures.

You are only required to answer the questions the first time you enter the portal. However, you can update your responses from the Employee Portal at any point if your status changes.

**New User Information**

You will only have to answer the few questions on this page this one time or if there is a change in your status.

**Please indicate Yes or No for the following statements:**

- I am a principal investigator, co-investigator, or project director or am otherwise responsible for the design, conduct, or reporting of research.
  - Yes
  - No

- I am a member of the faculty.
  - Yes
  - No

- I am an exempt employee.
  - Yes
  - No

User Tip: You can hover over any orange text throughout this site, and helpful definitions will pop up.

**Tool Tip!**

Throughout the portal, you will see orange text. You can hover over that text, and helpful definitions and tips will pop up.
• After you answer the new user questions, you need to read and acknowledge the policy(s) governing outside activity.

Now you can
• Make a disclosure (if you have activity to disclose) OR
• Go to your Employee Portal (where you can do a number of things including making a request for approval)

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University of Texas Outside Activity Portal

Acknowledgement

Please acknowledge that you have read and understood your institution’s policies related to outside activity, substantial/financial interests, and conflict of interest and conflict of commitment.


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

[ ] Acknowledge

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Thank You for Your Acknowledgement

You may be required to disclose outside activity.

Based on your answers to the previous questions, you may have to disclose outside activity under The University of Texas System Systemwide Policy “Conflicts of Interest, Conflicts of Commitment, and Outside Activities” (UTS 180) and your institutional HOP/HOOP.

Please proceed to the disclosure form OR to your employee portal.

Go to the disclosure form.

Return to the Employee Portal if you do not have any activity to disclose or if you want to request approval for a new activity.