UT System Outside Activity Portal Tool Tip Training

Finalizing Disclosures

ANNUAL FINALIZATION PERIOD
Annual Finalization Period

- When is it? January through March. (It is timed to coincide with when you would receive W2s, etc., and would have accurate annual compensation if needed.) Example: In January through March of 2014, you would finalize the 2013 year.
- What is it? The period of time when you review and update existing disclosures for the previous calendar year. It is also your last chance to make any disclosures not previously submitted for that year.
- Once all disclosures for that previous calendar year have been made and updated, you are ready to FINALIZE your disclosures for the year.
- Very important: Once you have finalized a year, you cannot make additional disclosures for that year. Disclosures that have been finalized cannot be edited or deactivated.
- ALSO: this is not the only time disclosures can be made. They can be made at any point during that year. This is just the last chance to make and finalize them for the year that has just ended.
Annual Finalization Period

• Finalization is only available during this annual period
• The “Finalize Disclosures” link will show up in the Actions Box of your Employee Portal
• Once you believe you have made all disclosures for the closing year, you should select that link

Employee Portal

Actions

• Request Approval
• Make a Disclosure
• Status Questions and Policy Acknowledgement
• Finalize Disclosures

About User

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You may make new requests or disclosures, update existing forms, or change your status questions at any time during the year.
Annual Finalization and Certification

This view will show you only SUBMITTED disclosures related to the closing calendar year. Disclosures that have been saved but not submitted will not show up here.

- Review the details of each to make sure there are no changes that need to be made (Select “View”).
- Submit any disclosures you might have forgotten to make (after you submit them, they will show up in this view)
- Once you are certain all disclosures have been made and are accurate, select “Ready to Finalize” for all of them (this acts as an electronic signature on each)
- And then check the “Certification” box and click “Certify”.

Final Review of Disclosures
Here are the disclosures that you have reported so far for this year. Please review the details of your disclosures and make any necessary updates. Once they are updated, check that they are ready to finalize. ALL disclosures must have the ready to finalize box checked before you can certify.

Certification
The information I have provided is for the purpose of assuring compliance with the Standards of Conduct (Texas Government Code Chapter 572) and the Regents’ Rules and Regulations related to disclosure of possible conflicts of interest or commitment. I understand that it is my responsibility to comply with the Standards of Conduct, the Regents’ Rules and Regulations, and any other applicable federal or state law, rule, or policy governing conflicts of interest.

[Certify button]
Annual Finalization and Certification

After you click certify, the same page will refresh but there should be NO disclosures in the table.

You can Return to the Employee Portal (Actions Box) OR close your browser window.

Please note: the finalized disclosures will no longer appear in the tables on your Employee Portal page. You can view them—and all previous disclosures—by clicking on the View Previous link under the Approvals and Disclosures tables. The only Action available on these disclosures is Duplicate.