UC Outside Activity Tracking System (UC OATS)

Health Sciences Faculty who are members of the Health Sciences Compensation Plan → *Tips for Reporting Earning/Effort and Stock/Stock Options for an Outside Professional Activity* 2023-2024 Reporting Period → *July 1, 2023 – June 30, 2024*

Refer to the following UC OATS articles for instructions on how to report effort (e.g., earnings, time, and stock/stock options) for outside professional activities:

- [Report Earnings/Effort](#)

- [Report Stock/Stock Options](#)

- For outside professional activities, a "day" is defined as 8 hours. If you engaged in the activity for 3 hours in one day, then report 3 hours on that specific date. If you engaged in the activity for 10 hours in one day, only report 8 hours. In accordance with [APM 671-14-c](#), *"…professional activities performed during the evenings and weekends, count toward the annual time limits and earnings approval threshold."*

- For accurate reporting, record the date for each instance you spent time on a Category I or II activity during the reporting period. *Effort should be reported based on the actual dates of engagement and can be reported multiple times per activity. Be sure to enter the actual start date and end date engaged in the activity (do NOT enter the beginning and end of the reporting period):*

Example: Dr. Apple spent <u>8 hours</u> engaged in OPA on August 1, 2023, the date should be entered:

Start Date:* 2023-08-01

End Date:* 2023-08-01

Enter the actual start date and end date you engaged in the activity, NOT the beginning and end of the reporting period.

➢ **Information about Requests to Exceed Threshold**

  ➢ [Request to Exceed Time and Earnings Threshold Form](#)

  ➢ [Multiple Exceed TH Forms for an Activity](#)

Engaging in an activity that will exceed effort (time/earnings), <u>requires prior approval</u> and should be entered as soon as possible to allow time for review and approval routing in UC OATS. When entering effort (time/earnings) and a threshold is exceeded, a "Request to Exceed TH" form will be generated. Continue with entering effort (time/earnings) until all known effort is reported in UC OATS because the "Not Submitted" request will update in real time accounting for all effort entered. Then submit the one "Request to Exceed TH" form for approval once reporting anticipated/known effort is completed.