

April 12, 2019

**DEANS, EXECUTIVE ASSOCIATE DEANS, ASSOCIATE DEANS, ASSISTANT DEANS, CHAIRS,
AND ACADEMIC PERSONNEL ANALYSTS**

Re: UC OATS ANNOUNCEMENT – Faculty subject to APM 025 *and* Specialists in Cooperative Extension (CE)

Dear Colleagues,

We are pleased to officially announce the launch of the UC Outside Activity Tracking System (OATS). As we've previously shared, UC OATS, originally developed by UCLA Health Sciences, is the result of a multi-campus collaboration to provide a web-based platform for use throughout the UC system. UC OATS provides a new and efficient way for faculty, deans, and faculty administrators to track, manage, and annually certify outside professional activities. This platform helps facilitate the reporting of outside professional activities and creates more streamlined review and approval pathways, enabling faculty to easily comply with the University of California Conflict of Commitment policies.

Our prior system for submitting APM 025 (Conflict of Commitment) requests, Forms Online, was disabled effective February 28, 2019. All electronic forms are now in other systems. More information on Academic Affairs electronic forms is available [here](#).

Faculty engaging in APM 025-related activities must utilize UC OATS for all Category I prior approval requests (which must be made prior to engaging in the activity), for disclosure of Category II activities, and for Annual Certification reports. To understand the differences between Category I and II activities, please refer to the links at the end of this document.

IMPORTANT CHANGES:

- Outside Professional Activity time-limits will now be measured in whole *hours* instead of whole days for UC OATS:
 - Academic-Year = 312 hours (39 days' x 8 hours)
 - Fiscal-Year = 384 hours (48 days' x 8 hours)
- Users will need to report *actual time* spent engaged in both Category I and Category II outside professional activities. UC OATS enables users to report their effort at any time during the academic/fiscal year of the activity.
- The Annual Certification report will automatically populate based on the activities and hours entered in UC OATS for Category I and II activities. Users should review the report to ensure their information is accurate and current, and then submit their Annual Certification report.
- UC Davis requires additional information to be incorporated for review of prior approval requests for Category I activities. For guidance on the required information, a link is provided below under the "Policy and Additional Information" section. ***Note: Prior approval requests missing the required additional information will be returned.***

The following requests and actions should be submitted, reviewed, and approved in the UC OATS system:

- Requests for prior approval to engage in APM 025 Category I activities.
- Requests for prior approval for student involvement in outside professional activities.

- Documenting and recording time engaged in APM 025 Category I and II activities.
- The annual fiscal year certification report of outside professional activities.

UC OATS APM 025 Webinar Trainings for UC Davis:

Our campus webinars were delayed because of the campus closure due to the Camp Fire and several other extenuating circumstances. However, we are back on track with webinar training dates and times hosted by the UC OATS Training Specialist. Below are the scheduled dates/times for users to become familiar with the features of UC OATS. *Please note, questions about APM 025 policy and procedures will not be answered during these sessions.*

Webinars – Faculty

Who should attend? Faculty subject to APM 025 policy and procedures and Specialists in Cooperative Extension (CE).

April 25th, Thursday (zoom information will be posted [here](#) by April 19)

- 9:30 am – 10:30 am

April 26th, Friday (zoom information will be posted [here](#) by April 19)

- 1:30 pm – 2:30 pm

Webinars – Reviewers and Approvers

Who should attend? Individuals with responsibility for reviewing and approving conflict of commitment requests and annual certifications. Specifically, Department Chairs and Associate Deans/Deans who have an “Approver” role in UC OATS. Also, department staff, department managers, and Deans’ office analysts who have a “Reviewer” role in UC OATS.

April 25th, Thursday (zoom information will be posted [here](#) by April 19)

- 1:30 pm – 2:30 pm

April 26th, Friday (zoom information will be posted [here](#) by April 19)

- 9:30 am – 10:30 am

Accounts and Accessing UC OATS:

Accounts have been generated for the following users:

- Faculty and Specialists in Cooperative Extension subject to APM 025, including deans and faculty administrators.
- Department and Deans’ office staff with APM 025 responsibilities.

Please note that faculty with responsibilities for approving APM 025 requests and reports, including chairs and associate deans/deans, will have two roles in UC OATS – as a faculty member and as an approver.

Users with accounts are able to access UC OATS through the UC Davis portal page: <https://ucdavis.ucoats.org/> Log into the UC OATS portal using the Central Authentication Service (CAS) by entering your UC Davis computing account username and passphrase.

Additional Resources:

Please consider watching the 2-minute [UC OATS Introduction video](#) to learn more. There are multiple training resources available to help you get started with UC OATS:

1. **Tutorial Videos** – learn the basics with short tutorial videos on the [UC OATS website](#).
2. **User Guides** – access the full UC OATS user guides on the [UC OATS website](#).
3. **In-system Tool Tips** – for assistance filling out forms, look for the blue “Tutorial” button in the UC OATS interface.

For more information on UC OATS at UC Davis, please visit our website at:

<https://academicaffairs.ucdavis.edu/oats>

For technical questions or feedback related to the UC OATS application, please send e-mails to:

oats-help@ucdavis.edu

Policy and Additional Information

[APM 025 – Conflict of Commitment and Outside Activities of Faculty Members](#)

[APM UCD 025 – Conflict of Commitment and Outside Activities of Faculty Members](#)

[Additional Information Requirements](#) – please review this document when entering an activity request

For questions related to APM 025 policy and procedures, faculty are asked to please consult with the academic personnel expert in their department. Department staff with policy-related questions should consult with their dean's office for guidance, and deans' office staff with policy-related questions should consult with their Academic Affairs team manager.

Sincerely,

A handwritten signature in blue ink, appearing to read "Philip H. Kass".

Philip H. Kass

Vice Provost—Academic Affairs

Professor of Analytic Epidemiology,

Population Health and Reproduction (Veterinary Medicine),

and Public Health Sciences (Medicine)