

This message is being sent to all Senate Faculty, Department Chairs, Deans and Department Business Officers and Staff

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Date: July 11, 2023

This is a reminder regarding the University of California Academic Personnel Manual ([APM 025, Conflict of Commitment and Outside Activities of Faculty Members](#)) requirements for prior approval for Category I activities and annual reporting of Category I and II outside professional activities.

Faculty holding the following titles at 50% time or more are subject to APM 025:

- Assistant Professor, Associate Professor, Professor
- The above titles when used with an Acting or Adjunct prefix
- Lecturer PSOE, Lecturer SOE, Senior Lecturer SOE

In addition to systemwide APM 025, please see recently updated local policy guidance in [Red Binder I-29](#), Conflict of Commitment and Outside Professional Activities. If you have already submitted your annual report for the 2022-23 year, no further action is needed at this time. Retired faculty are not required to complete a 2022-23 report. New hires for Fall 2023 are not required to complete a 2022-23 report.

**2022-23 Reporting Year:**

[A. Faculty with No Outside Activities](#)

[B. Faculty with Category I or II Outside Activities for 2022-23](#)

[C. Faculty with Category I Outside Activities requiring Prior Approval in 2023-24](#)

[D. Step-by-step Summer Salary Set Up](#)

Faculty with **both** Category I and II activity in 2022-23 will need to refer to B. All faculty may wish to refer to D for summer reporting information. Additional OATS Training Resources may be accessed directly at

<https://ap.ucsb.edu/resources.for.department.analysts/oats/training.resources/>

**Prior Approval:** Prior approval is required to: (1) engage in Category I activities, or (2) involve a graduate student in outside professional activity.

Category I activities include, but are not limited to:

- Teaching, research, or administration of a grant at an educational institution, trust, organization, government agency, foundation, or other entity outside of the University
- Employment outside of the University
- Assuming an executive or managerial position in a for-profit or not-for-profit business
- Assuming a founding or a co-founding role of a company

Category I activities include current or pending acceptance of an honorary, visiting, adjunct, or other institutional appointment at an outside institution, or participation in or application to talent recruitment programs sponsored by a government agency of a nation other than the

United States. Prior approval of Category I activity is required even if the activity will take place while on an approved leave or over the summer period.

All prior approvals and annual reporting are processed via UC OATS, the systemwide Outside Activity Tracking System. OATS may be accessed directly at <https://ucsb.ucoats.org/> (sign in using your UCSB NetID and Password). Faculty are strongly encouraged to use the step-by-step instructions above as a guide.

**Please note:** Reports for years prior to 2018-19 cannot be completed in OATS. To complete late reports for prior years please log onto the Academic Personnel home page and click on “2017-18 and earlier Outside Activity Reporting.”

Questions regarding policy or use of OATS may be addressed to Mira Lázaro [mslaza@ucsb.edu](mailto:mslaza@ucsb.edu), Lia Cabello [lia.cabello@ucsb.edu](mailto:lia.cabello@ucsb.edu) or Helly Kwee [helly.kwee@ucsb.edu](mailto:helly.kwee@ucsb.edu)

Technical questions may be submitted to [help@aait.ucsb.edu](mailto:help@aait.ucsb.edu)

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