UC OATS - Outside Activity Tracking System Annual Reporting

Faculty with Category II Outside Activities for 2021-22 *(last updated 7/17/2022)*

Category II activities:

- Additional University - compensated teaching (CME & UNEX) or self-supporting UC degree programs. (For purposes of this section, Summer Session teaching is excluded; see APM 661, Additional Compensation: Summer Session Teaching.)
- Consulting for a domestic or foreign government agency
- Consulting or testifying as an expert or professional witness
- Providing or presenting a workshop for industry
- Providing outside consulting or compensated professional activities performed for Los Alamos National Security and Lawrence Livermore National Laboratories
- Providing outside consulting services or referrals or engaging in professional practice as an individual or through a single-member professional corporation or sole proprietorship
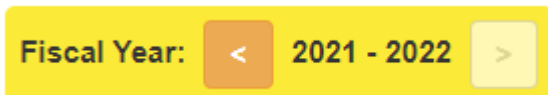- Serving on board of directors outside the University

1. Go to: https://ucsb.ucoats.org/
2. Click on "**Log in to OATS**" green button

3. Sign in using your UCSBnetID and Password
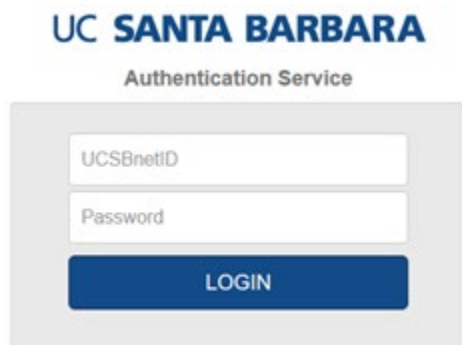
4. Locate the reporting year by clicking arrows, as needed

5. If you did not enter your Cat II activities earlier in the year, click on "**Enter an Activity**"

6. Enter the following information:
   a) Organization Name
   b) Type (for profit or non-profit)
   c) Locate the Activity Type(s) from the list (may choose multiple)
   d) Answer student involvement question
       i. If involving a student, prior approval will be needed
   e) Name this Activity
   f) Click on the "**Enter**" green button

Enter

7. The Activity will be added to your **Activities** list. Locate the activity and click on the **Report Effort** button in the Actions column.

Report Effort

    a) AY reporting: modal will pop up asking you to enter the start and end dates and number of hours which you engaged in this activity. Service dates for the 2021-22 academic year are **9/19/21 through 6/10/2022**. Effort reporting within the academic year must fall within these dates.

        i) A day is 8 hours. For example, if you engaged in the activity for 10 hours in one day, you need to enter only 8 hours.

        ii) For outside teaching, enter podium hours. The system will calculate preparation time by a factor of 1.33

    b) For summer effort reporting, enter number of hours of activity in each month separately:

Are you reporting effort during: ○ **Academic Term** ⦿ **Summer Term**

Select the month of the summer term: | -- Select One -- ∨ |
-- Select One --
July
August
September
June

Click the **Report** button

Report

8. Go through each activity in the list and enter the dates/hours as appropriate.

9. Once all activities for 2021-22 are entered, you may complete annual certification by locating the purple "Annual Certification" button:

ACTIONS: | Fiscal Year: | < | 2021 - 2022 | > | **Enter an Activity** | **Copy Activity** | **Annual Certifications**

This will bring up your AC summary. Click on "Not Submitted"

Annual Certification Summary

Fiscal Year	Submitted Date	Approved Date	Status
2018 - 2019	09/14/2019	10/22/2019	Accepted
2019 - 2020	07/29/2020	08/06/2020	Accepted
2020 - 2021	08/29/2021	09/29/2021	Accepted
2021 - 2022			Not Submitted

Close

Click on the purple button:

Annual Certification for 2021 - 2022   Certify Activities   Not Submitted

This will bring up a pop-up:

Certify Activities for Fiscal Year 2021 - 2022

I certify that I have complied with the provisions of APM -025 and have reported all Category I and II activities as required by policy.

Enter your initials to certify: * [   ]

Submit   Close

Enter your initials and submit.

Note: you may copy activities from prior years, if needed, before completing your annual certification (excluding Cat I).

Copy Activity

a) Navigate to the past reporting year which has the activity you wish to copy, for example:

Copy Activities to Year 2021 - 2022

You can copy category 2 or 3 type activities from other reporting years. Please navigate to the reporting year which has the activity you wish to copy and press the "Copy" button to copy that activity.

NOTE: You can not use this function to copy category 1 type activities. Please use the "Renew" button at the bottom of the category 1 prior approval form to seek permission to continue a specific category 1 activity.

< **Fiscal Year: 2021 - 2022**

b) Press the "Copy" button to copy that activity

Copy