

# UC OATS - Outside Activity Tracking System

## Faculty with Category I Outside Activities in 2019-20 requiring Prior Approval

### Category I activities:

- Administration of a grant outside the University
- Assuming an executive or managerial position outside the University
- Assuming a founding or co-founding role of a company
- Employment outside the University
- Research outside the University
- Teaching outside the University

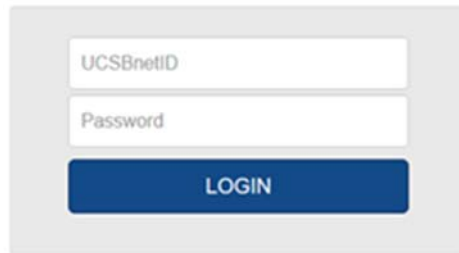
1. Go to: <https://ucsb.ucoats.org/>
2. Click on “**Log in to OATS**” green button



3. Sign in using your UCSBnetID and Password

**UC SANTA BARBARA**

Authentication Service



A screenshot of the UCSBnetID authentication service login form. It features two input fields: 'UCSBnetID' and 'Password'. Below the fields is a blue button labeled 'LOGIN'.

4. Locate the reporting year by clicking arrows as needed



A screenshot of the fiscal year selection interface. It shows 'Fiscal Year:' followed by a left arrow, the text '2018 - 2019', and a right arrow.

5. Click on “**Enter an Activity**”



6. Enter the following information:
  - a) Organization Name
  - b) Type (for profit or non-profit)
  - c) Start/End date of activity. Dates on this window must fall within the fiscal year. (For Cat I activities, you may request an end date beyond the fiscal year on the next form, the Category I Prior Approval Form for Outside Activities.)
  - d) Locate the Activity Type(s) from the list (may choose multiple)
  - e) Answer student involvement question
    - i. If involving a student, prior approval will be needed
  - f) Name this Activity
  - g) **Enter** to submit

Enter

- i. The **Prior Approval Form** will appear if your activity is Category I – fill out the fields as required.
- ii. When requesting approval beyond the fiscal year, enter both the start date for which you are seeking approval and the last date for which you are seeking approval. The system will accept a date beyond 6/30 on the Category I Prior Approval Form.

i) Click **Notes** tab at the top to add notes and/or documentation

7. Click **Request Approval** to submit, or **Close** if you wish to complete the form later

Request Approval

a) NOTE: you must enter a date in the “Approve up to” field in order to Request Approval.

8. The Activity will be added to your **Activities List**. The status of your Category I request will be indicated within the form button:

Cat I Approval: **Approved**

9. Once approved, or if more information is required, you will receive email notification.

a) **Important:** Please do not engage in the activity or Report Effort until approval is obtained.

10. Track time spent on the activity by locating the activity from your list and click on the **Report Effort** button in the Actions column.

Report Effort

a) A 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 2019-20 academic year are **9/22/19 through 6/12/20**. 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 the podium hours and the system will calculate preparation time.

b) Click the **Report** button

Report