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
4. Locate the reporting year by clicking arrows as needed
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 must fall within the fiscal year)
   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
i. The **Prior Approval Form** will appear if your activity is Category I – fill out the fields as required.

   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

   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](Image)

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.

   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.

      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