

**UCLA**

# OATS Approver Manual



**Outside Activity Tracking System**



**Go to the website**

<https://oats.dgsom.ucla.edu/>

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# Logging Into the System

UCLA DGSOM OATS

[oats.dgsom.ucla.edu](https://oats.dgsom.ucla.edu)



David Geffen  
School of Medicine

Outside Activity Tracking System

Not logged in [Log In](#)



Please begin by clicking the Log In link below.

The Outside Activity Tracking System (OATS), is an easy to use web-based system through which faculty members can report outside activities and income. It employs a simple question and answer interactive format and an intuitive interface, and automatically determines activity category and what APM-671 guidelines the activity is associated with. The system will decide when pre-approval is required and will route requests automatically to the appropriate reviewer or approver group.

Log In to OATS

## Policies

- [APM-670, UC Health Sciences Compensation Plan](#)
- [APM-671, Conflict of Commitment and Outside Activities of Health Sciences Compensation Plan Participants](#)

## Helpful Forms

- [IRS Tax Letter Template](#)
- [Category I Prior Approval Form](#)
- [Request to Exceed Earnings Retention Threshold](#)
- [Request to Exceed Time or Earnings Threshold](#)
- [Sabbatical and Leave of Absence Form](#)

## Sign In with your UCLA Logon ID

Sign In

Forgot your [UCLA Logon ID](#) or [Password](#)?  
[Need a UCLA Logon ID?](#)

# Creating a UCLA Log On

## [logon.ucla.edu](http://logon.ucla.edu)

Follow the instructions upon clicking on the item you need:

[Create UCLA Logon ID](#)

[Manage UCLA Logon ID](#)

[Manage Email Preferences](#)

[Look Up UCLA Logon ID](#)

[Change Password](#)

[Reset Password](#)

[Set Security Question](#)



**UCLA** [logon.ucla.edu](http://logon.ucla.edu)

### Create UCLA Logon ID

By completing this procedure, you will activate your UCLA Logon. Before proceeding you must identify yourself to the system.

I am a (select all that apply):

- New UCLA Student (including admitted applicants)
  - UCLA Applicant on the waitlist
  - Current UCLA Student
  - Former UCLA Student (including alumni)
  - UCLA Summer Session Only Student (new, current, or former)
  - UCLA Faculty Member or Staff Member
  - UCOP or UC Merced Staff Member
- I do not have a UCLA Identification Number and I am **NONE OF THE ABOVE**. Accounts created without a UCLA ID number can be used to authenticate to many UCLA applications, but are not generally eligible to receive campus services.

For further assistance, contact the Help Desk by telephone at 310-267-HELP (4357) or email at [accounts@ucla.edu](mailto:accounts@ucla.edu).



**UCLA** [logon.ucla.edu](http://logon.ucla.edu)

### Create UCLA Logon ID

By completing this procedure, you will activate your UCLA Logon. Before proceeding you must identify yourself to the system.

You must have your 9-digit UCLA Identification Number to continue. You can find this number:

- On your online or paper letter of admission (new students, waitlisted applicants)
- On your BruinCard (current students, alumni, faculty, staff)
- On your UCLA transcript (current students, alumni)
- On your paycheck stub or online earnings statement (faculty, staff)

#### Students, Alumni, Faculty, and Staff

If you do not remember your 9-digit UCLA ID number please bring photo identification that clearly displays both your full name and date of birth (Driver's License, Passport, or other Government issued ID) to the Bruin OnLine Help Desk located in Suite 124, Kerckhoff Hall. If you are not able to visit the Help Desk, please fax in a completed copy of the [UCLA Logon Service Request Form](#), with all required supporting documentation.

For further assistance, contact the Help Desk by telephone at 310-267-HELP (4357) or email at [accounts@ucla.edu](mailto:accounts@ucla.edu).

#### Validate Your Identity

First Name

Last Name

Date of Birth (YYYY-MM-DD)

UCLA ID Number

# Your WORKSPACE: Review/Approval Tab

David Geffen School of Medicine OATS Outside Activity Tracking System

Welcome, Tyrone Rex OATS Homepage Logout

NEW ACADEMIC YEAR: 2016-2017

Review/Approval Annual Certifications My Faculty Profile

Filter by date: From: To: Clear

Approval pending Completed forms All Activities

ACTIVITIES: APPROVAL PENDING

Show 25 entries

Request Approval Type	Department	Faculty	Activity Types / Roles	Activity Label	Details	Actions
Over Time & Earnings TH	Medicine	Joe Bruin	Consulting for government agencies (Cat. 2) Consulting for non-profit health organizations (Cat. 2)	1609180014	15.00 hrs over th. \$25.00 over th.	Approve Send Back
Over Time & Earnings TH	Surgery	Linda Bear	Add'l University-compensated teaching (CME & UNEX) (Cat. 2)	201604260909	25.00 hrs over th. 30.00 \$ over th.	Approve Send Back
Over Time & Earnings TH	Pharmacology	Cozzy Adams	Assuming founding or co-founding role of a company (Cat. 1)	Biotech	30.00 hrs over th. \$0.00 over th.	Approve Send Back
Category I	Medicine	Joe Bruin	Assuming executive or managerial role of a company (Cat. 1)	Cat 1 task	This is a Category I	Sign / Date Send Back
Category I	Medicine	Josephine Bruin	Employment outside the University (Cat. 1)	CME Course	This is a Category I	Sign / Date Send Back
Category I	Surgery	Linda Bear	Administration of a grant outside the University (Cat. 1)	201605051627	This is a Category I	Sign / Date Send Back

Showing 1 to 6 of 6 entries

Use the top buttons to navigate the sections of your workspace.

**Review/Approval**

Review and Approve Activities here.

**Annual Certifications**

List of faculty that have completed Annual Certification.

**My Faculty Profile**

Add your activities here.

Activities are organized into tabs- Approval Pending, Completed Forms, and All Activities.

Actions: allow you to Approve, Sign/Date, or Send Back requests.

# Your WORKSPACE: Approving an Activity

**David Geffen School of Medicine** | **OATS** | Outside Activity Tracking System | Welcome, Tyronn Rex | OATS Homepage | Logout

VIEW BY FISCAL YEAR: < 2016 - 2017 >

Review/Approval | Annual Certifications | My Faculty Profile | Cat I & Request TH Status

Filter by date: From: [ ] To: [ ] Clear

Approval pending | Completed forms | All Activities

**ACTIVITIES: APPROVAL PENDING**

Show 25 entries

Request Approval Type	Department	Faculty	Activity Types / Roles	Actions
Over Time & Earnings TH	Medicine	Joe Bruin	Consulting for government Consulting for non-profit h	Approve   Send Back
Over Time & Earnings TH	Surgery	Panda Bear	Add'l University-compensat	Approve   Send Back
Over Time & Earnings TH	Pharmacology	Grizzly Adams	Assuming founding or co-founding role of a company (Cat. 1)	Approve   Send Back
Category I	Medicine	Joe Bruin	Assuming executive or managerial role of a company (Cat. 1)	Sign / Date   Send Back
Category I	Medicine	Josephine Bruin	Employment outside the University (Cat. 1)	Sign / Date   Send Back

**Please Review Activity: CFO company XYZ**

Status: This request has not been approved. Please click the button below

Plan participant's name: Bruin, Faculty

The total estimated number of hours to be devoted to this activity:

The number of hours that are expected to exceed the threshold:\*

The total expected income from this activity:

The amount of total annual earnings that are expected to exceed the threshold:\*

Person or entity(ies) who will receive and/or pay for the service: Profit Company XYZ

Please enter your initials to approve: (required)

Reason to send back:

Approve | Send Back | Close

**Click on the Approve button and the activity details will pop up in separate box.**

**Review and enter your initials and select the Approve button. If you select the Send Back button, provide a reason for sending the request back in the text area. The message will be relayed to the faculty member after clicking on Send Back.**

# Your WORKSPACE: Completed Forms and All Activities

David Geffen School of Medicine

OATS  
Outside Activity Tracking System

Welcome, Tyronn Rex OATS Homepage Logout

VIEW BY FISCAL YEAR: < 2016 - 2017 >

Review/Approval Annual Certifications My Faculty Profile

Filter by date: From: [ ] To: [ ] Clear

Approval pending Completed forms All Activities

ACTIVITIES: APPROVED

Show 25 entries

Request Approval Type	Department	Faculty	Activity Types / Roles	Details	Actions
Over Earnings TH	Department of Surgery	Janeson Chair	Consulting for government agencies (Cat. 2) Assuming executive or managerial role of a company (Cat. 1) Consulting for non-profit entities (Cat. 2) Assuming founding or co-founding role of a company (Cat. 1) Consulting for non-profit health or education-related organizations (Cat. 2)	\$2,000.00 over th	Review

To find activities that you have already approved or signed and dated, click on the **Completed Forms** tab.

All of the activities of all of your department's faculty can be found on the **All Activities** tab.

You can review the details of the form by clicking on the **Review** button.



# Your WORKSPACE: Annual Certification

Clicking on Annual Certifications allows you to view a list of reviewed Annual Certifications.

David Geffen School of Medicine

VIEW BY FISCAL YEAR: < 2016 - 2017 >

Review/Approval Annual Certifications My Faculty Profile

Search by UID, name or department code:

FACULTY: ANNUAL CERTIFICATIONS

Show 25 entries

UID	Faculty	Department	# Activities	Total Hours	Total Earnings	Due To Plan	Actions
123456789	Joe Bruin	Medicine	4	104	\$64,000	\$24,000	Review
987654321	Panda Bear	Surgery	8	98	\$48,000	\$8,000	Review
928374611	Lesser Panda	Neurology	0	0	0		Review

To review a faculty's annual certification, click on the Review button.

Annual Certification 2016 - 2017: Panda Bear

	Threshold	Total for fiscal year	Amount over threshold for fiscal year
Time	300 hrs.	98 hrs.	0 hrs.
Earnings	\$60,000.00	\$48,000.00	\$8,000.00

Certify no activities

Please enter your initials to Approve: (required)

If you do not wish to Approve, please state your reason to Send Back:

Approve Send Back Close

Clicking on **Approve** will approve the Annual Certification.

If you need to send it back to the faculty member, write an explanation and click the **Send Back** button.