**INSTRUCTIONS**

1. **PURPOSE OF A REVIEW**: The fundamental purpose of a review is to examine the information submitted on an individual Outside Activities Report (OAR) to determine whether issues exist related to the completeness of the OAR or a potential conflict of commitment.
2. **WHAT TO LOOK FOR:** While performing a review, it is important to routinely check for the following:
   1. Determine who has not yet completed their annual OAR and urge them to do so as soon as possible (prior to the annual April 30th deadline).
   2. Review individual OARs for completeness.
      1. The chair or other departmental designee is unlikely to know of all outside activities engaged in by faculty and staff in one’s department.
      2. If one is aware of unreported activities, a reminder of the duty to report is warranted.
   3. Review outside activities to determine whether they are consistent with University regulations specific to:
      1. Commitment – The amount of time spent on outside activities should not interfere with university duties.
      2. Use of Facilities – University facilities should not be used in support of outside activities without an explicit agreement signed by the chair.
      3. Use of students or supervised staff – Participation of students or supervised staff in outside activities should be supervised by the departmental chair.
   4. Review potential conflicts of interest as they might relate to clinical or other professional duties.
3. **HOW TO COMPLETE REVIEWS:** Basic instructions for using the Reviewers’ Tools are provided below.
4. To begin your reviews, please select the appropriate UDDS from the drop down menu in the gray “My Reviews” search box and click the “Search” button. You may streamline your search results by using the search filters (i.e. OAR Status, My Reviews, and Entities) listed below the UDDS field. These filters allow for searching by individuals with no entities only, those with entities only, people you have already reviewed, and people you still need to review. In addition, you may search by only those who have submitted an annual OAR, as well as those who have not yet submitted an annual OAR.
5. Once you have clicked “Search”, your search results will populate in table format below the gray “My Reviews” search box. The table will list the names of individuals within your UDDS. Any individuals who have yet filed an updated annual OAR will be highlighted in yellow. In addition, a new feature has been added that allows you to sort the table by the red column headers (i.e. Name, Fed, HS, Dept and UDDS, First Review, and Second Review).
6. With the redesign, there are now columns that display:
   * Whether an individual has federal funding (Fed) or participates in human subject research (HS),
   * A list of the entities the individual has a relationship with (Entity),
   * The number of days spent with the each entity (Days), and
   * A link to the corresponding Management Plan (MP), if one is in place.
7. Once you have reviewed an individual or group of individuals, you may save your reviews by clicking the corresponding check box (or click “Approve All” for a large group of completed reviews) and click the “Save Reviews” button above/below the “Review/Comment” column. Once saved, your NetID and the date of review will appear in the appropriate review column, indicating that your review for the listed individual(s) is complete.\*\*
8. **PRINTING:** If you would like to print the table, scroll to the bottom of table resulting from your search. Click the “Print” button and the table will re-format itself to accommodate for printing through your browser’s print function. It is strongly recommended that you print in the landscape page orientation.

\*\*Please Note: The Reviewers’ Tools will time out after 45 minutes of inactivity. There will be a pop-up at 30-mintues of inactivity to notify you that you need to save your work. If your progress is not saved before 45 minutes of inactivity, the Reviewers’ Tools will refresh and you will pick up where you were after your last successful save in the system.