

**Senior Management Group: Outside Professional Activities  
Monthly/Bi-Weekly and Annual Reporting Procedures**

**Outside Professional Activities Policy & Guidelines**

- **Local Coordination:** Centrally coordinated in the UCSF Human Resources' Executive Compensation Unit
- **Regents Policy 7707:** <http://policy.ucop.edu/files/smg-docs/smg-opa-policy.pdf>

<b>Outside Professional Activities Reporting Procedures: Monthly/Bi-weekly and Annually</b>		
<b>Topic</b>	<b>Compensated</b>	<b>Uncompensated</b>
Approval of Professional Activities	<ul style="list-style-type: none"> <li>• The pre-approval process for the upcoming year occurs in December/January of each year.</li> <li>• Each SMG member's supervisor and next level higher are responsible for approving requests.</li> <li>• Signed approvals are retained, centrally, in HR's Executive Compensation Unit (ECU).</li> </ul>	<ul style="list-style-type: none"> <li>• The pre-approval process for the upcoming year occurs in December/January of each year.</li> <li>• Each SMG member's supervisor and next level higher are responsible for approving requests.</li> <li>• Signed approvals are retained, centrally, in HR's Executive Compensation Unit (ECU).</li> </ul>
Time Spent on Professional Activities	<ul style="list-style-type: none"> <li>• Time devoted to activities whether before, during or after work hours and weekends need to be tracked and ultimately reported. While after-hours reporting is not articulated in policy, practice, as directed by Office of the President, is inclusion of all hours devoted to a compensated activity, for reporting purposes to the Regents.</li> <li>• Time needs to be tracked and reported in 1 hour increments. Daily activities of 30 minutes or more should be rounded to one hour and activities of less than 30 minutes do not need to be tracked and reported.</li> </ul>	<ul style="list-style-type: none"> <li>• Time devoted to activities during work hours are to be tracked and ultimately reported.</li> <li>• As with compensated activities, time is to be tracked and reported in 1 hour increments. Daily activities of 30 minutes or more should be rounded to one hour and activities of less than 30 minutes do not need to be tracked and reported. If an outside activity conference call is 30 minutes or more, round to the nearest hour.</li> </ul>
Use of Vacation for Professional Activities	<ul style="list-style-type: none"> <li>• If activities are required during work hours and require the SMG member to spend 30 minutes or more, vacation must be used.</li> <li>• If travel is involved with the activity, travel time must be included in the total and represented by vacation hour usage.</li> <li>• Vacation hours, for compensated activities during work hours, inclusive of travel time during work hours, must be entered into HBS.</li> </ul>	<ul style="list-style-type: none"> <li>• It is not necessary to use vacation for activities conducted during working hours.</li> </ul>
Reporting Time Spent on Activities	<ul style="list-style-type: none"> <li>• On a monthly or bi-weekly basis, time spent during work and non-work hours must be reported in the HBS system. HBS has a drop-down menu with the following two options: <ul style="list-style-type: none"> <li>- "Vacation-Outside Activities"</li> <li>- "Outside Activities-LWOP"</li> </ul> Time spent during work hours which needs to be charged to vacation should be reported under "Vacation – Outside Activities." If vacation hours are not available, time is to be reported as "Outside Activities-LWOP" to ensure a salary deduction.</li> </ul>	<ul style="list-style-type: none"> <li>• On a monthly or bi-weekly basis, uncompensated activities are reported through the HBS time-reporting system. The drop-down HBS menu provides an option titled "Outside Activities – Uncompensated," for reporting incremental hours occurring during work hours.</li> <li>• In the HBS "Notes" section, on any particular day where an uncompensated outside activity is reported, the name of the agency is to be indicated.</li> </ul>

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Topic	Compensated	Uncompensated
	<ul style="list-style-type: none"> <li>• Time spent before or after work hours is to be reported in the HBS “Notes” section with the specific # of hours and timeframes for each date of the activity.</li> <li>• Also in the “Notes” section, the specific name of the agency is to be reported.</li> </ul>	
Annual Reporting of Time	<ul style="list-style-type: none"> <li>• For the Annual Report on Outside Professional Activities, all compensated outside professional activities are reported through Office of the President’s Senior Leadership Information System (SLIS), as entered by the UCSF HR ECU:               <ul style="list-style-type: none"> <li>- Name of the organization;</li> <li>- Profit or non-profit status;</li> <li>- Role;</li> <li>- Total time served;</li> <li>- Time during business hours;</li> <li>- Time outside business hours;</li> <li>- Vacation debited;</li> <li>- Cash compensation;</li> <li>- Deferred compensation;</li> <li>- Description of deferred compensation;</li> <li>- Other compensation;</li> <li>- Description of other compensation;</li> <li>- Grant type;</li> <li>- # granted; and,</li> <li>- Strike price per share.</li> </ul> </li> <li>• The report is a chronicle of all compensated outside professional activities for the year and is coordinated by OP for presentation to the Regents.</li> <li>• The local process, in preparation for the OP/Regental report, is conducted during the months of January-March each year for the prior year by HR’s ECU.</li> </ul>	<ul style="list-style-type: none"> <li>• For the Annual Report on Outside Professional Activities, all uncompensated outside professional activities are reported through Office of the President’s Senior Leadership Information System (SLIS), as entered by the UCSF HR ECU:               <ul style="list-style-type: none"> <li>- Name of the organization;</li> <li>- Profit or non-profit status;</li> <li>- Role;</li> <li>- Total time served;</li> <li>- Time during business hours;</li> <li>- Time outside business hours;</li> <li>- Vacation debited;</li> <li>- Cash compensation;</li> <li>- Deferred compensation;</li> <li>- Description of deferred compensation;</li> <li>- Other compensation;</li> <li>- Description of other compensation;</li> <li>- Grant type;</li> <li>- # granted; and,</li> <li>- Strike price per share.</li> </ul> </li> <li>• The report is a chronicle of all uncompensated outside professional activities for the year, during work hours, and is coordinated by OP for presentation to the Regents.</li> <li>• The local process, in preparation for the OP/Regental report, is conducted during the months of January-March each year for the prior year by HR’s ECU.</li> </ul>