INSTRUCTIONS FOR OAR REVIEW

1) **PURPOSE**: The main purpose of OAR review is to consider whether OARs are complete and accurate in their reported information, and whether potential conflicts of commitment exist.

   i) When you "review" an OAR, you are not "approving" it and stating there are no conflicts. Rather, you are indicating that you have reviewed it, are aware of outside activities, and have contacted the person with any concerns that may need to be addressed.

2) **WHAT TO LOOK FOR:**

   (a) <u>Who hasn't filed an OAR this year?</u> If someone has not filed, urge that person to do so as soon as possible.

   i) https://coi.research.wisc.edu/lookups/poolLookup.html

   (b) <u>Are the OARs complete?</u> If you are aware of unreported activities, please give reminders to people about their duty to report outside activities. If problems persist, please contact the Conflict of Interest program at coiprogram@research.wisc.edu

   Please remember that all outside activities related to a person's institutional responsibilities, including those of spouses or immediate family members, need to be reported. **This includes uncompensated activity, such as an unpaid position as a trustee or advisory board member.**

   (c) <u>Are there potential conflict of commitment</u>? Outside activities should not interfere with an employee's ability to carry out assigned University duties.

   (d) <u>Are University facilities being used?</u> University facilities used in support of outside activities must have a University-approved Facilities Use Agreement in place before they are used. Facilities Use Agreements are prepared and approved by the Office of Industrial Partnerships in Research and Sponsored Programs.

   (d) <u>Are students and staff involved?</u> Students or supervised staff who are participating in outside activities should be supervised by the departmental chair.

   (f) 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.

a) To begin your reviews, please visit oar.wisc.edu, login with your NetID, and select your "Reviewer" role as seen below.

b) All pending review will be displayed in one of the "review needed" tabs. You may filter your review worklist by name, year, federal funding (Fed), human subjects research (HS), Public Health Service (PHS), UDDS, and UDDS name from the filter line at the top of each tab.

c) From left to right, you will see:

    (1) The reporting year

    (2) Whether the person is listed on a federally funded award

    (3) Whether the person is listed on a human subjects protocol

    (4) Whether the person has PHS funding

    (5) The UDDS numbers the person reported on his or her OARs

    (6) The names of reported entities

    (7) The number of days spent on the reported entity

    (8) Whether the relationship with that entity has ended

    (9)   Reported compensation from the entity

    (10) The person's reported ownership in the entity

    (11) Whether a management plan has been assigned for the entity

d) Once you have reviewed the information for an individual or group of individuals, you must click the corresponding checkmark on the far right side of

the page to complete a review.

1. To enter a comment, click the comment bubble, add the comment and click "ok."

1. Comments appear in in the "current year completed reviews" tab with the date of the comment and the name of the commenter.

2. If a comment has been entered about an individual, the comment bubble will appear in red. If there are no comments, the comment bubble appears in blue.
3. NOTE: entering a comment does not complete a review, you must click the checkmark to do so.

4) COMPLETED REVIEWS, DISCLOSERS, AND REPORTS

a) To see a list of reviews that have been completed in your UDDS number(s), go to "Current Year Completed Reviews." The date of the review and the name of the reviewer will appear on completed reviews.

b) To find more information on disclosers within your UDDS number(s), go to "Disclosers"

i) If you click on the icon next to a discloser's name, you will see a screen that displays six different tabs:

Entities	OARs	Documents	Grants	Human Subjects Protocols	Reviews

Active

▲ Name	Managed?	Advisory Letter	Roles	Total Compensation	Total Ownership
Google	MP Signed		Advisory Board Membership: Self Consulting: Self Receive royalties from technology licensing: Self Holder of an equity interest: Self Travel events paid for or reimbursed by the entity: Self	2017: $0 2018: $60,000 - $79,999	None
Prologo	No Management		Consulting: Self	2017: $0 2018: $10,000 - $19,999	

2 items   ◁ page 1   of 1 ▷   10   / page

Inactive

No data to display.

(1) Entities: all of the discloser's active and inactive entities.

(2) OARs: all of the discloser's OARs.

(3) Documents: documents that have been uploaded for the discloser's files, generally as part of a management plan (e.g., department chair meeting confirmation, notification letter).

(4) Grants: grants on which the discloser is listed.

(5) Human subjects protocols: UW–Madison IRB protocols the discloser is listed on as a study team member.

(6) Reviews: complete and incomplete OAR reviews related to the discloser.