Approving the Outside Interests Disclosure Form – Without Conflicts

Supervisor Level

IRIS Mobile through the Web

The Outside Interests Disclosure Form is for the University of Tennessee faculty and staff to disclose outside interests as required by the University's Conflict of Interests Policy which can be found here:

https://iris.tennessee.edu/wp-content/uploads/sites/13/2018/05/PolicyFI0125.pdf.

The OID form routes to the IRIS Inbox of the employee's supervisor for approval. The supervisor receives a system generated email notification that an OID work item is pending their review.

Authentication:

The IRIS Inbox is available through the IRIS Web Portal or through the direct links below.

- 1. Access *IRIS Mobile* through the *IRIS Web Portal* here: <u>https://irisweb.tennessee.edu</u> and click the *IRIS Mobile* tab. This method is demonstrated in this help document.
- 2. Alternatively, the IRIS Inbox can be accessed in a browser by visiting the *IRIS Mobile* site directly here: <u>https://irismobile.tennessee.edu/fiori</u>. The logon screen is shown below and requires the same NetID and password used for logging into IRIS.



- Note that the IRIS Inbox can be accessed directly here:_ <u>https://irismobile.tennessee.edu/fiori#zOIDemp-display</u>
- This document demonstrates the approval process for the supervisor approving an OID

form with **no** conflict of interests disclosed by the employee.

- In this example, the IRIS Inbox is accessed by option #1 above, *IRIS Mobile* through the *IRIS Web Portal*. Authenticate with your NetID and password. If you need assistance with your NetID, click one of the links to the left.
- **NOTE:** Make sure your browser settings are set to allow pop-ups from this address.

	CENTRAL AUTHENTICATION SERVICE
TENNESSEE	To continue, please enter your NetID and password:
What is a UT NetID?	NettD: mattdillon
Forgot Your Password?	
Need help signing in?	Password:
Current service alerts and outage	LOGIN
	By logging in to this site, you agree to the terms of the U <u>T Acceptable Use Policy</u> .
UT The flagship campus of the University of Tennessee System and partne	er in the Tennessee Transfer Pathway.

• After authenticating, click on the **IRIS Mobile** tab.

UT #IRI	SWeb									
	History Fa	avorites Personalize View	w Help							
Home	Inbox	IRIS	IRIS Mobile	Employee Self-Service	ESS (Others)	Reports	PI Reporting Self-Service	Shop	Other	
Welcome Too	ols									
	1	Home > Welcome > 1	Nelcome							
Welcome										
Forms							V	Velcome	to IRIS \	Web
• IRIS News and	Events	IRIS Web provide the various IRIS	es access to emp Web offerings.	oloyee self-service and	other functions fo	ound within the	e IRIS system. The applicati	ions available to	o you appear as	tabs across
		• Inbox								
		• IRIS or	the Web							
		• Employ	ee Self-Ser	vice						

Accessing the Work Item:

• The *IRIS Mobile Home* screen is displayed with white squares of information called **Tiles**. Select the **My Inbox** tile to display current work items pending approval. If you are an IRIS approver, all of your IRIS work items are displayed in this Inbox.

8 RIS			Home
My Approvals Er	nployee Self-Service (I	ESS) General	
My ELR Approvals Electronic Ledger R	My Inbox My Work Items		
Employee Self-Servi	ice (ESS) General		
IRIS Paystubs	My Benefits Display benefit plans		
\$	දිනු O Pending Plans		

• On the *My Inbox* screen, click **Outside Interests Disclosure for (employee name)** to highlight the work item. Details are displayed on the right side of the screen.

8 < 🍙 💽		My Inbox 🗸
	All Items (4) žΞ	OID Approval
×	Search Q C	
	Outside Interests Disclosure for Fuller, Clern Workflow System Medium	Outside Interests Disclosure for Fuller, Clem Workflow System Ready Created on 06/06/2018, 14:22:04
	Time Approval - Dillon, Matthew Workflow System Medium Due on 06/07/2018, 06:00:16	
	Leave Request for Fuller, Clem- 2.00 hrs Sick Leave - 1st shift Workflow System Medium	has completed an Outside Interests Disclosure Form (OID), Document Number 0000000000847, and this form is ready for your review.
	Leave Request for Fuller, Clem- 4.00 hrs Sick Leave - 1st shift Workflow System Medium	
	↑↓ 7 (=)	Show Log Claim Forward Suspend Open Task [2]



• Select **Open Task** at the bottom of the screen to execute the work item.

Making Comments or Attachments:

 The OID Forms (Approver) screen is displayed. The header contains information about the employee who submitted the form. If comments and/or attachments exist, these can be viewed by selecting **Comments** or **Attachments** on the left side of the screen. You also have the ability to add additional comments in addition to viewing previously made comments and attachments in the same section.

2 < @ 💿		OID Forms (Approver) ∨	
		C PDF DF	⑦ Help
		Outside Interests Disclosure 2018 Created Rv: Fuller, Clean Position: Senior Administrative Ser, Create Date: 06/06/2018	
	Comments Attachments No Comments	Personnel No: 00277443 Document ID: 847 Status: Submitted Email: CFULLE3@TENNESSEE EDU	
	Create a new comment	Supervisor	
		For more information, please click the Approval Path button to review the employee's Outside Interests Disclosure Form.	
		Did the employee answer Yes to any questions? Yes No In your opinion, does the information disclosed represent a potential conflict of interests with the employee's Universit	у
		responsibilities or activities with sponsoring organizations? Yes No Unsure If Yes or Unsure , describe the conflict or potential conflict and your recommendation for resolving or monitoring it (or attach a separate document).	
		Cancel Save Approv	re Return

• To make a comment, click on the **Comments** button and then begin typing in the text box that says "Create a new comment." *Your comments will be visible to subsequent approvers in the workflow path as well as to the employee.*



 To upload an attachment, click the Attachments button, and then click the new button. From there, you will be able to upload an attachment. All attachments will be visible throughout the workflow path and will also be visible to the employee.







• The form can be reviewed by selecting **Approval Path** and then **Employee**.

Instructions

OID-Exec-Form.pdf

	C- PDF			C Approval Pa	ath ⑦ H
G °	Outside Interests Disclo	osure 2018			
Comments Attachments	Created By: Fuller, Clem	Position: Senior Administrative Ser	Create Date: 06		
	Personnel No: 00277443	Document ID: 847	Status: Submitte	Employee	>
No Comments	Email: CFULLE3@TENNESSEE.ED	U			_
				Supervisor	>
eate a new comment					
	Supervisor				
				\otimes	Close
			_		
	For more information in	lease click the Approval Path button to revi	ew the employee's Q	itside Interests	1
	For more information, p Disclosure Form.	lease click the Approval Path button to revi	ew the employee's Ou	utside Interests	
	For more information, p Disclosure Form.	lease click the Approval Path button to revi	ew the employee's Ou	utside Interests	
	For more information, p Disclosure Form.	lease click the Approval Path button to revi	ew the employee's Ou	utside Interests]
	For more information, p Disclosure Form.	lease click the Approval Path button to revi	ew the employee's Ou	utside Interests]
	For more information, p Disclosure Form.	lease click the Approval Path button to revi	ew the employee's Ou	utside Interests	
	For more information, p Disclosure Form.	lease click the Approval Path button to revi	ew the employee's Ot	utside Interests	

• Scroll down to see all information. The employee's answers are greyed out and cannot be changed. In this example, the employee has answered "No" to all questions. Once the form has been reviewed, select **Cancel** at the bottom of the screen to return to the *OID Form (Approver)* screen.



Display, Print or Email the PDF Version:

• The entire form can also be displayed by selecting **PDF**, and then **View PDF** at the top of the screen.

×	PDF		D Approval Path	⑦ Help
Comments No Comments	E View PDF E Email Created by: Fuller, Clem Personnel №: 00277443 Email: CFULLE3@TENNESSEE.EDU	2 2018 Position: Senior Administrative Ser Document ID: 867	Create Date: 06/07/2018 Status: Submitted	
	Supervisor For more information, please Disclosure Form. Did the employee answer Yes to any	click the Approval Path button to revi	ew the employee's Outside Interests	

۶r	THE UNI TENN	VERSITY OF		The Face Outs Stat	University of Tennessee ulty and Staff side Interests Disclosure 2018 us: Submitted
Document ID: 206			Stage: Supervisor		Workflow ID: 146145487
Personnel No	. 00800048	Full Name Clem	Fuller	Email	CFULLE3@TENNESSEE.EDU
Fitle	Senior Administ	trative Ser	c	ampus/Institute	University Administration
Cost Center	E179994		Co	st Center Name	IRIS Training
Your Inte 1. Are you a (for-profit or	rests In officer, director non-profit) other	r, board member, trustee than the University?	e, owner, or employee	e of any organiza	tion or business entity
NO					

• The OID form can be emailed by selecting **PDF**, and then **Email**.

[C. PDF		[j] Approval Path	⑦ Help
Comments Attachments	View PDF G Email Created by: Fuller, Clem Personnel No: 00277443 Email: CFULLE3@TENNESSEE.EDU	e 2018 Position: Senior Administrative Ser Document ID: 857	Create Date: 06/07/2018 Status: Submitted	
Create a new comment	Supervisor For more information, please Disclosure Form.	e click the Approval Path button to revie	ew the employee's Outside Interests	

• Enter the email address on the Email PDF pop-up window and select Send.

	Email PDF
į	Please enter recipients' email addresses (Hit 'Enter' to add a new email address. Max: 5)
te	est@utk.edu
	⊗ Cancel 🖈 Send

• Select the **Help** button to display the **Outside Interests Disclosure Help** website, which can also be accessed directly at https://iris.tennessee.edu/OID-Help/.

2 < 📾 💽		OID Forms (Approver)	~	
		C PDF		D Approval Path () Help
	Comments	Outside Interests Disclosure 2018 Created By: Fuller, Clem Position: Se Personnel No: 00277443 Document ID Email: CFULLE3@TENNESSEE.EDU Supervisor	nior Administrative Ser C D. 847 S	reate Date: 06/06/2018 tatus: Submitted
		For more information, please click the Appr Disclosure Form. Did the employee answer Yes to any questions? Yes No In your opinion, does the information disclosed represponsibilities or activities with sponsoring organiz Yes No Urger No Unsure If Yes or Unsure, describe the conflict or potential or attach a separate document).	oval Path button to review the resent a potential conflict of intere rations?	employee's Outside Interests ests with the employee's University for resolving or monitoring it (or
		Cancel		Save Approve Return

UT THE UNIVERSITY OF TENNESSEE

Office 365 Search tennessee.edu A-7 Index Directory

Q

IRIS Administrative Support > Outside Interest Disclosure

Outside Interest Disclosure

The Outside Interest Disclosure (OID) form is the means by which employees disclose certain interests and activities to the University. If you are a regular faculty or staff employee, the University of Tennessee requires you to submit an OID form annually, or whenever your reporting status changes. Please see the details below for more information.

Employees

Approvers

Click HERE for everything you need to know about submitting your Outside Interest Disclosure form.

Click HERE for everything you need to know about reviewing and approving Outside Interest Disclosure forms that have been submitted for your review.

Policy

All qualifying employees are required to disclose conflicts of interest annually, or when their reporting status changes. Click HERE to review the full policy.

Approve or Return the Work Item:

- Once the form has been reviewed, answer the questions on the OID Forms (Approver) screen. In this example, the employee does not have any outside interests to disclose and has **not** answered "Yes" to any questions. The options on this screen are as follows:
 - Question 1 defaults to No due to no potential conflicts identified for this 0 employee.
 - Question 2 must be answered, and for this example No is selected as confirmation that the employee has not disclosed any information representing a potential conflict of interest.
 - Once both of these questions have been answered, the following actions are 0 available:
 - Approve: Approve this OID form. In this example, the employee has submitted **no** conflicts of interests and the form does not require any further approval after the supervisor's approval.
 - **Save**: Save this information and return later for processing.
 - Return: Return this form to the employee for revision.
- Select **Approve** to approve this form with no conflicts of interests to report.

	C PDF		[] Approval Path () I
Comments Attachments No Comments	Outside Interests Disclosur Created By: Fuller, Clem Personnel No: 00277443 Email: CFULLE3@TENNESSEE.EDU	Position: Senior Administrative Ser Document ID: 847	Create Date: 06/06/2018 Status: Submitted
Create a new comment	Supervisor		
	For more information, please Disclosure Form.	e click the Approval Path button to rev	iew the employee's Outside Interests
	Did the employee answer Yes to an Yes No In your opinion, does the information responsibilities or activities with sponsibilities of the open of the sponsibilities of the	ny questions? on disclosed represent a potential conflict onsoring organizations?	of interests with the employee's University
	If Yes or Unsure , describe the con attach a separate document).	flict or potential conflict and your recomm	endation for resolving or monitoring it (or
	Cancel		Save Approve Re

• A confirmation message will appear. Select **OK** to confirm, or select **Cancel** to exit the approval process.

For m Disclo	ore information, please click the Approval Path button to revie osure Form.
	[?] Confirmation
	Are you sure you want to approve the form?
Did the en	OK Cancel
In your opi	nion, does the information disclosed represent a potential conflict of

• An "Approved" message will be displayed and the work item will be removed from the Inbox. The approval for the OID form is now complete. Select the **Back Arrow** button or the **Home** button to return to the *Home* screen. Or, select the **Person** icon to log out of the IRIS Mobile system.



• Select **Sign Out** on the profile screen.

Matt Dillon () sign Out	
	All Items (3)
	Search Q O
🚓 🚓 😤 🗊 🛄	Time Approval - Dillon, Matthew
App Finder Settings Manage My Substitute More Substitutes for	Workflow System Medium Due on 06/08/2018, 06:00:16
Recent Activity Frequently Used	Leave Request for Fuller, Clem- 2.00 hrs Sick Leave - 1st shift Workflow System Medium
There are no recent activities	
There are no recent activities	Leave Request for Fuller, Clem- 4.00 hrs Sick Leave - 1st shift
	Workflow System Medium

• Select **OK** to sign out of the system.

