

# Disclosure Guide: External Activities and Interests

## *Examples of common activities*

TIP: What does “related to my institutional responsibilities or professional expertise” mean?

The term “institutional responsibilities” refers to any professional responsibilities that you undertake on behalf the University of South Alabama, which may include, for example, research, research consultation, teaching, professional practice, institutional committee memberships, and service on panels such as Institutional Review Board. Professional expertise refers to anything in your area of expertise with the caveat that it shouldn’t be applied too narrowly. This does not mean that this term broadly captures the entirety of one’s field, such as engineering, biology or political science. When evaluating what is related, instead consider aligning your analysis with the appropriate sub-field, such as electrical engineering, molecular biology or political theory.

Type of Disclosure	Disclose	Examples	Disclose NOT Required
<b>Financial Interest, Ownership, Management, or Intellectual Property (IP) Income</b>	<ul style="list-style-type: none"> <li>You or a family member have a financial interest in a publicly or non-publicly traded entity related to your institutional responsibilities</li> <li>Have equity or ownership interest related to your institutional responsibilities in a privately traded entity</li> <li>You or a family member have an ownership interest in a business or other entity with a commercial purpose in the USA</li> </ul>	<ul style="list-style-type: none"> <li>Owning a faculty startup company that licenses USA technology related to your expertise</li> <li>A family member holding a management position in an entity with a commercial purpose in the USA</li> <li>Receiving licensing fees in excess of \$5,000 annually from</li> </ul>	

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**royalties, licensing fees, copyright income, or other income from IP related to expertise**

Type of Disclosure	Disclose		
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Type of Disclosure	Disclose	Examples	Disclose NOT Required
Outside Research	<ul style="list-style-type: none"> <li>Performing any research for or receiving research funding from any institution other than UF</li> </ul>	<ul style="list-style-type: none"> <li>Holding a research appointment at another institution</li> <li>Conducting research and development for a company in your private capacity</li> </ul>	<ul style="list-style-type: none"> <li>Research performed at external entities as part of a USA sponsored project or with USA research funds</li> <li>Collaborative USA research performed during official business travel</li> </ul>
Sponsored Travel	<ul style="list-style-type: none"> <li>Applies to Investigators on research projects funded by <a href="#">PHS or foundations that follow the PHS COI regulations</a></li> <li>See <a href="#">FAQs: PHS Requirement to Disclose Sponsored Travel</a> for Sponsored Travel that should be disclosed</li> </ul>	<ul style="list-style-type: none"> <li>Sponsored travel is any travel expense that has been paid directly for you by a third party or for which you have been reimbursed by a third party</li> </ul>	<ul style="list-style-type: none"> <li>USA applies this requirement only to Investigators working on PHS projects or foundations that follow PHS COI regulations.</li> <li>See <a href="#">FAQs: PHS Requirement to Disclose Sponsored Travel</a> for Sponsored Travel that</li> </ul>

