Outside Activity, Financial Interest, and Potential Conflict Disclosure Matrix

Question #1: Do you have any financial interests and/or outside activities to report?

Important Note: Inside activities are part of an employee's primary UCF role/appointment and should not be disclosed on the AA-21 Disclosure Profile in Huron COI. To help determine whether an activity qualifies as an inside activity, please consult the Inside Activity Decision Tree.

Disclosure Type	Disclose	Examples	Reporting Exclusions (Do Not Disclose)
Compensated Outside Activity	• Compensated activities (includes honoraria) for any service you provide to a non-UCF entity (domestic or foreign) • Compensated activities for any service you provide to UCF that is not part of your primary role/appointment For each compensated outside activity disclosed, you will be required to answer whether: • You intend to hire a UCF student for whom you have an evaluative responsibility at UCF for the activity • You intend to hire an employee you supervise to provide administrative support for the activity • You intend to use UCF resources (e.g., equipment,	• Compensated teaching external to UCF (e.g., courses, workshops, lectures, trainings) • Compensated teaching for a course at UCF that is outside your usual appointment • Obtaining an additional staff appointment at UCF • Paid outside employment or receipt of an honorarium for serving as a – consultant – contractor – company officer – expert witness – legal representative – visiting scholar – board, commission, or committee member • Paid outside employment or receipt of an honorarium to serve as a chair/organizer/presenter for conference sessions or program	• Activities funded by UCF, activities through UCF, or contractual agreements through UCF (e.g., approved UCF travel acquisition request or sponsored research funding) • Investments made through the publicly traded stock markets or investment firms • Faculty dual appointments at UCF RESEARCHERS – You do not need to disclose personal inheritances or gifts from family or charitable donations that do not relate to your UCF area of expertise.

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Compensated Outside Activity (Continued)	facilities, supplies) or services (including IT services) in carrying out the activity RESEARCHERS – You must also disclose any compensated service you or your immediate family provides to an entity other than UCF that reasonably appears to be related to your UCF institutional responsibilities. You must report compensation or remuneration in the form of gifts, donations, personal inheritances, and compensated travel from a foreign entity that relates to your UCF area of expertise	committees, speaking engagements, giving a presentation, community talk, or organizing a public lecture • Receipt of research funding (i.e., grant or funding award) from any entity (domestic or foreign) or engaging in research for compensation that is not routed through UCF • Consultation with schools for programing • Academic program reviews for universities • Agreement (verbal or written) to engage in collaborations (e.g., an agreement to publish an article or perform research tasks) • Paid Honorary appointments	
Uncompensated Outside Activity	• Activities that do not count as part of your service-assignment (for faculty) or your UCF position, that occur during your regularly scheduled UCF commitments • When representing someone in a legal capacity	• You serve on a board that does not count as service or part of your UCF position and for which meetings regularly occur during your teaching or office hours • You have a law practice outside of UCF and take on pro bono cases • Uncompensated teaching that does not count as a service-assignment and occurs during your regularly scheduled UCF commitments	• Uncompensated presentations, workshops, or other speaking engagements delivered on behalf of UCF • Uncompensated teaching that is considered a service-assignment • Participation by a student or employee in an uncompensated activity that counts towards a service-assignment

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Uncompensated Outside Activity (Continued)	For each uncompensated outside activity disclosed, you will be required to answer whether: • You intend to use a UCF student for whom you have an evaluative responsibility at UCF for the activity • You intend to use an employee you supervise to provide administrative support for the activity • You intend to use UCF resources (e.g., equipment, facilities, supplies) or services (including IT services) in carrying out the activity RESEARCHERS - You must also disclose all uncompensated outside activities with foreign entities that relate to your UCF area of expertise. **Refer to the Inside Activity Decision Tree for assistance in determining if an activity qualifies as an inside activity that does not need to be reported.**	RESEARCHERS – Report the following uncompensated outside activities with foreign entities that relate to your UCF area of expertise: • Agreement (verbal or written) to engage in collaborations (e.g., an agreement to publish an article or perform research tasks) • Community talks • Consultation with schools for programing • Developing and putting on workshops • Engaging in research • Honorary appointments • Organizing public lectures • Partnerships with agencies - volunteer • Presentations/Talks • Academic Program reviews for universities • Serving as a consultant • Serving as an officer • Serving as the • chair/organizer/presenter for a conference session or program committee • Serving on boards or commissions • Serving on committees • Visiting scholar	• Personal volunteer activities such as coaching your child's little league team, volunteering at a place of worship or soup kitchen, etc. that occur outside your regularly scheduled UCF commitments • Serving on UCF formed committees or advisory groups • Uncompensated activities (other than legal representation) that count as a service-assignment • Activities of spouse or immediate family member RESEARCHERS – As it relates to uncompensated activities with foreign entities, you do not need to report: • Discussions with potential collaborators • When collaborators travel outside of the U.S. • The submission of a paper to a peer-reviewed journal • Presentations at US government organized conferences delivered on behalf of UCF Also, the following service-related activities do not need to be reported: • Accreditation reviews

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			• Adjudication (for performing arts) • Book reviews • Editing a journal/also guest editing (one issue) • Editor of book (service in some disciplines research in others) • Editorial boards where the only activity is book, grant, and/or journal reviews • Grant reviews- federal, foundations • Journal reviews • Promotion and/tenure reviews for other universities • Working with an international publishing company to publish a book/journal article • Serving as an expert witness in your area of expertise
Political Office	• If you hold a political office or plan to run for one	• Petition filed to have your name added to a ballot for a political office such as mayor	• Non-government office • Specific information about your political views or political party
Authorized Works Used in Classroom	• When requiring students to purchase works used in your classroom that you or your immediate family authored or co-authored (e.g., textbook(s), computer software, electronic or digital media) and for which	• A textbook you authored is required for your history course. Your publishing agreement entitles you to receive 1% of the sale each time the book is purchased.	• Student purchased works used in classes you or your immediate family members do not teach at UCF

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	you will receive, or anticipate receiving payment, loan, subscription, advance, deposit of money, service, or anything of value	• Your course requires students to purchase digital media from your spouse's company website • Your spouse requires students to purchase works used in their classroom that you authored or co-authored	
Entity Doing Business with UCF	• You, your spouse or child serve as an officer, partner, director, proprietor, have ownership in, or hold an employment or contractual relationship with an entity or agency that will: 1) sell goods/services to UCF, 2) purchase goods/services from UCF, or 3) enter into a research contract or technology transfer agreement with UCF • Report proposed sponsored funding (SBIR/STTR) or license agreements with the entity	• You, your spouse, or child own a company that will sponsor UCF research or license IP • You have a part-time position at an entity that contracts with UCF or fund UCF research • Employment with a Florida state agency that sponsors your UCF research	• Contractual or employment relationships with the U.S. government
Reimbursed Travel	• Any travel paid directly by, or reimbursed to you from, a non-UCF entity (domestic or foreign), regardless of whether the travel was undertaken as	• A company pays your transportation expenses associated with an external consulting agreement • A company reimburses your travel expenses for your participation as	• Travel funded by UCF (i.e. approved UCF travel acquisition request) • Travel reimbursed to you under a UCF sponsored project (i.e., paid

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	part of your official UCF duties.	a subject matter expert at their conference • You are a board member for a non-profit organization which pays for your travel to attend in-person board meetings.	by a research sponsor through UCF)
Foreign Government Talent or Recruitment Program	• Participation in a foreign government talent or recruitment program	• You participate in a program organized, managed, or funded by a foreign government, or a foreign government instrumentality or entity, which aims to recruit professionals or students (regardless of citizenship or national origin, or whether having a full-time or part-time position) to further the goals of a foreign government. • You participate in a program organized, managed, or funded by a foreign government, or a foreign government instrumentality or entity, which aims to acquire proprietary technology or software, unpublished data and methods, and intellectual property to further the military modernization goals and/or economic goals of a foreign government.	• Programs organized, managed, or funded solely by non-foreign, domestic entities or the United States government • Programs organized or managed through a UCF written contractual agreement (e.g., research contract, memorandum of understanding, or collaboration agreement)

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Below apply only to employees engaged in sponsored research or research involving human subjects or animals at UCF

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Equity Interest	• Stock, Stock Options, or Ownership Interest from you or your immediate family that reasonably appears to be related to your UCF institutional responsibilities Note: New research employees should report equity interests received in the last 12 months and during the current reporting period	• Your spouse owns a startup company that will sponsor your UCF research • You have equity in a company that has an interest in the results of your research or IP for commercial purposes • Ownership or equity interest in a non-U.S. business • Personal inheritances or gifts from family that include an ownership or financial interest in a non-U.S. business or relate to your UCF area of expertise	• Income from investment vehicles, such as mutual funds and retirement account contributions made by UCF on your behalf
Intellectual Property Rights	• Patent, copyright, license, or royalties paid directly to the you or your immediate family (not through UCF) that reasonably appears to be related to your institutional responsibilities Note: If not previously reported, disclose income over the past 12 months	• You receive royalties from an IP license agreement for technology invented prior to UCF employment • Income related to non-UCF IP received by you or your immediate family	• Royalties paid to you through UCF and/or the UCF Research Foundation • Compensation paid through UCF and/or UCF Research Foundation for: – IP rights assigned to UCF related to your IP – the value of royalty sharing agreements between you and UCF related to your IP

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Below applies only to College of Medicine (COM) personnel

Disclosure Type	Disclose	Examples	Reporting Exclusions (Do Not Disclose)
College of Medicine Health/Medical Industry Partner	• College of Medicine (COM) personnel with outside relationships with health care industry vendors (e.g. pharmaceutical, biotechnology, medical device, and medical equipment suppliers) who develop products and services that are marketed and sold to medical schools, academic health science centers, researchers, educators, and/or clinicians • Activities including written or verbal agreements with health care industry vendors that occur during both work and non-work hours Note: All collaborations with health care industry vendor must be based on the goals of advancing science, education, and clinical care consistent with the COM mission and values and not for vendor's commercial or marketing purposes).	COM PERSONNEL- Report the following agreements (written or verbal) with health care industry vendors: • Part-time employment • Providing consulting services serving on health care industry vendor's advisory board • Speaking at a health care industry vendor sponsored event • Attending a health care industry vendor sponsored event • Publishing in a health care industry vendor funded publication • You will hold a Significant Financial Interest of $10,000 or more with respect to a health care industry vendor	• Indirect minority investment interests, such as ownership of stock, or investments in a mutual fund that owns shares in companies constituting Industry.

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Question #2: Are any of your relatives employed by, or plan to work for UCF during the current reporting period?

Disclosure Type	Disclose	Examples	Reporting Exclusions (Do Not Disclose)
Employment of Relatives	• Relatives working for UCF or planning to work for UCF	• You plan to marry or form an intimate relationship with a current UCF employee • Your father-in-law recently accepted a faculty position	• Cousins second, third, or fourth removed working for UCF • Relatives from a previous relationship that was dissolved