Creating External Activities in the Agreements Module

How-To Guide

Insight is Emory University's platform for managing research protocols and related administrative workflows. This document walks users through the process of creating **External Activities** in the **Agreements** module, with a focus on adding a new outside entity. It explains how to manually enter entity details, submit them for Compliance review and finalize the agreement once approval is received.

External Activities

- External activities are things you do outside your work at Emory that might be considered a conflict of interest.
- This includes paid consulting, work for a company in the medical industry, speaking at a conference sponsored by a pharmaceutical company or service on a board of directors.
- Consult Emory guidelines for more information about what external activities are and how and when they should be reported.
- Note that while external activities are reported in the **Disclosures** module, individual external activities must first be created in the **Agreements** module.

Create an External Activity

1. From the dashboard or the menu on the left, click **Agreements**. *The Agreements module opens.*
2. From the navigation menu on the left, go to Actions and click **Create Agreement**. *The Create Agreement screen displays.*
3. In the middle of the screen, navigate to the **External Activities panel** and click the **button** that says, **"Yes, I am submitting a record related to external activities."** *Additional questions will display below.*
4. The first field asks for the name of the **Emory Principal Investigator (PI)**. Enter **your name** in the field and select your name from the dropdown menu. *The organization/department for the Emory PI auto-populates in the field below.*
    a. Since external activities are specific to individuals and not to a particular study, the PI for the external activity is you or the person for whom you are creating the activity.
5. Confirm the department or organization for the Emory PI selected above.
6. At the bottom right corner of the screen, click **Create**. *The Agreement Details screen displays with the organization/department information auto-populated.*

7. In the field that displays, enter a title for the external activity.
    a. Be sure to use a title you recognize; it will display in the **Disclosures** module later when you follow the process for disclosing external activities.
8. At the bottom of the screen, click **Next**. *The Outside Entity screen displays.*
9. In the **Entity** field, type the **full, official name of the outside entity** and click on the **correct entity**.
10. If the entity does not appear in your research, you can create a new one by clicking **Create a New**. *The New Form displays.*
11. In the **New Form**, enter the **Entity Name** and select the correct buttons for **non-profit status**, **publicly traded company** or **foreign entity**. Select the best **Description** from the dropdown menu. Then, click **Save**. *The Entity is routed to the Compliance Office for review. You cannot submit the External Activity until the entity is approved by Compliance, which may take several days.*
    a. Once the new **Entity** is added, you will need to officially select it from the dropdown menu on the **Outside Entity** page.
12. You have selected your Entity. At the bottom of the page, click **Next** to continue. *The External Activity screen displays.*
13. Answer all questions on the **External Activities** page, selecting the appropriate **buttons** and **checkboxes** that indicate your **faculty or staff** status, your **involvement in the research**, and **all activities** you intend to participate in under this request.
14. Using the **green upload space**, **drag and drop** or **upload** any attachments to this activity.
15. When all questions are addressed, click **Next**. *The Staff screen displays.*
16. From the Staff screen, add any other colleagues involved in the same activity by **clicking Add Additional Emory Staff** or **Add External Staff**. Then click **Next**. *The Attachments screen displays.*
17. Once again, use the **green upload space**, **drag and drop** or **upload** any attachments to this activity.
18. Review the items for this activity in the **navigation menu** on the left. If any section is incomplete, a red exclamation mark will appear beside that section title. Completed sections appear with a green check mark. Click on any **incomplete sections** to finalize the outstanding details.
19. At the bottom right of the screen, navigate to **Submit Actions**. Click the checkbox that says, **"I have carefully reviewed this record and confirm my sign off."**
20. In the **Submit Actions** box, Click **Submit**. *The external activity is created and the supervisor of the individual performing the activity is notified for signoff.*

Additional Resources

- Visit the [Project Insight SharePoint page] for additional training materials and project updates.