

# INSTRUCTIONS FOR EPAP REQUESTS

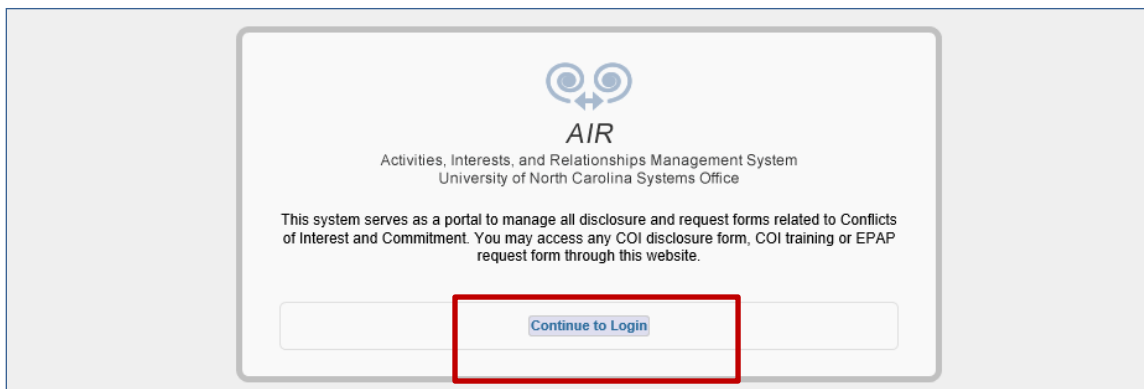
- **Purpose of EPAP Requests**

EHRA employees who desire to engage in External Professional Activities for Pay must submit a completed “Notice of Intent” to their supervisor for approval prior to beginning these activities. All EHRA employees are required to submit their requests in the AIR system for prior approval before engaging in External Professional Activities for Pay. EPAP requests must be submitted every fiscal year. See the [EPAP Policy and Memo](#) for more details.

- **Navigate to the AIR homepage using one of the following:**

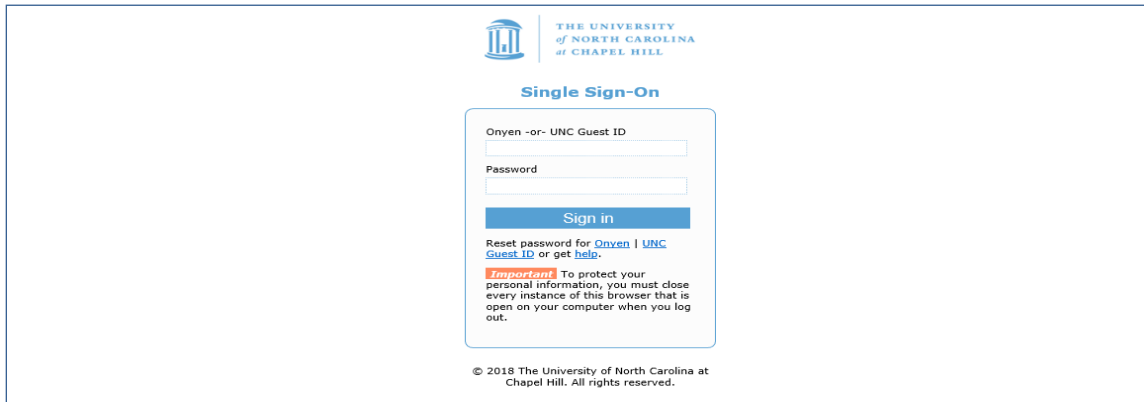
- a. Air System link <https://uncga.myresearchonline.org/air/>
- b. System Office My Apps page <https://myapps.northcarolina.edu> (click on the AIR icon)

- **Click “Continue to Login”.**

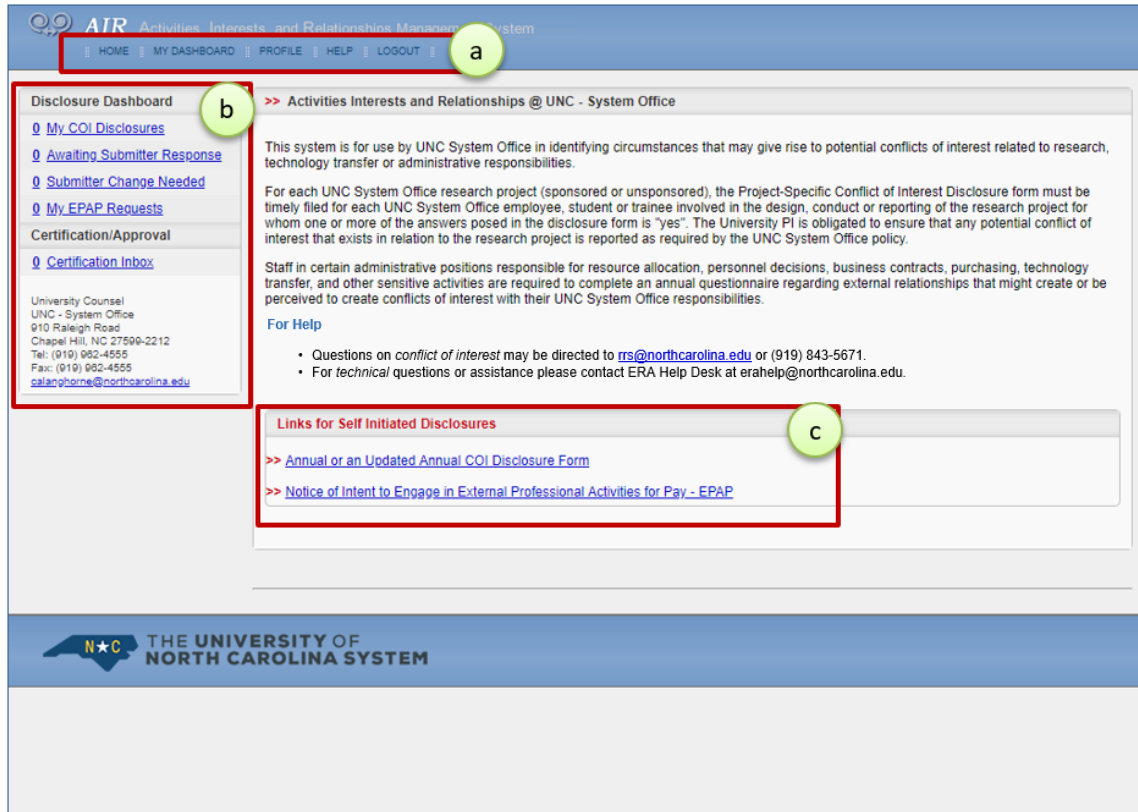


- **You will land on the AIR Authentication page**

**Login with your UNC Chapel Hill onyen and password (same login as TIM and ConnectCarolina)**

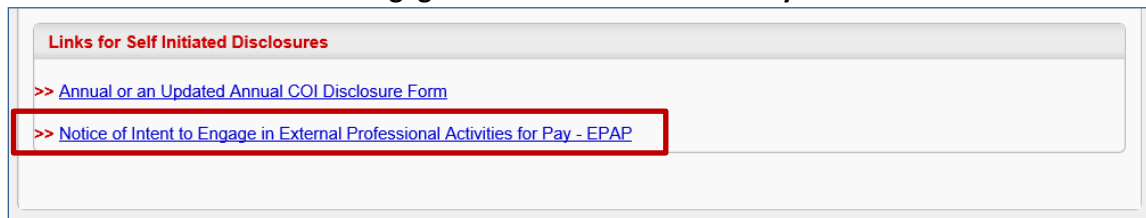


- After logging in, you will land on the AIR Home page



- - a. Use the top menu links to navigate through the system
  - b. Use the Disclosure Dashboard links to view your disclosures
  - c. Use the Self Disclosure links at the bottom of the page to enter new COIs and EPAPs

- Click the “Notice of Intent to Engage in External Activities for Pay – EPAP” link.



- The system displays the EPAP form.

The screenshot displays the 'Notice of Intent to Engage in External Professional Activities for Pay - EPAP' form. The form is divided into two main sections: 'Contact Information' and 'General Questions'. The 'Contact Information' section contains fields for Last Name, First Name, Department, Title, Campus Address, Campus Telephone, and Email. The 'General Questions' section includes a dropdown for Contracting Organization, a text field for the Address of Contracting Organization, a list of organization types with radio buttons, a text field for describing the proposed activity, and a question about funding or equipment support with Yes/No radio buttons. A 'Save and Continue' button is located at the bottom right of the form. Green circles with letters 'a', 'b', and 'c' are placed over the Contact Information section, the General Questions section, and the Save and Continue button, respectively.

- The Contact Information section will have your name and department information. *You cannot update contact information in AIR. If corrections/updates are needed, contact Robbie Snuggs at [rrs@northcarolina.edu](mailto:rrs@northcarolina.edu) or (919)843-5671.*

- In the General Questions section:

- Select the Contracting Organization if it is in the list. Otherwise, select "Sponsor Not Listed" and add the organization.
- Enter the Organization address

This screenshot focuses on the 'General Questions' section of the form. It shows the 'Contracting Organization' dropdown menu, which is currently open, displaying a list of options: 'Sponsor Not Listed', 'Chapel Hill-Carrboro City Schools', 'Maconstar', and 'Town of Chapel Hill'. A green circle with the letter 'a' is placed over the dropdown menu. Below the dropdown is a text field for the 'Address of Contracting Organization', with a green circle and the letter 'b' placed over it.

- In the General Questions section:

**General Questions**

**Contracting Organization:** Sponsor Not Listed  
Chapel Hill-Carrboro City Schools  
Maconstar  
Town of Chapel Hill

Address of Contracting Organization:

Which of the following best describes the contracting organization?

☐ For-Profit organization  
☐ Non-Profit organization  
☐ Federal  
☐ School district  
☐ Other state/local government agency  
☐ University  
☐ Other

Please describe the nature of the proposed activity:

To the best of your knowledge, does the contracting organization above provide funding or equipment which directly supports a research project on which you serve or any of your other University duties or activities?

☐ Yes ☐ No

[Save and Continue](#)

UNIVERSITY OF CAROLINA SYSTEM

- Fill out the rest of the contracting organization information. On the last question, *If you click **Yes**, the EPAP will include company information from your prior EPAPs*  
*If you click **No**, the EPAP will not include prior information*
- Click the “Save and Certify” button and the system will display the EPAP form.

- >> Notice of Intent to Engage in External Professional Activities for Pay - EPAP**

[Duplicate Disclosure](#)   
 [Quick View \(HTML\)](#)   
 [PDF](#)   
 [Delete Disclosure](#)

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### 1) Proposed Activity

Please indicate the role(s) of the proposed activity:

☐ Director  
☐ Board of Directors Member  
☐ Trustee  
☐ Consultant  
☐ Speaker  
☐ Other

Frequency of activity:  
☐ Single Time    ☐ Repeating Event

### 2) Dates

Each EPAP request should only cover a time period with one fiscal year (July 1 – June 30). If your activity spans more than one fiscal year, you must submit a separate request for each fiscal year in which you plan to engage in this activity.

Please enter the Beginning Date of your proposed activity. Remember the dates of your activity must fall within a single fiscal year.

mm/dd/yyyy

Please enter the Ending Date of your proposed activity. Remember the dates of your activity must fall within a single fiscal year.

mm/dd/yyyy

### 3) Time Commitment

Total number of hours to be devoted to activity:

Total Number of University Business Hours (M-F, 8-5), including travel time, that will be missed due to this activity:

Estimated duration of activity (length of time):  
☐ Less than a month  
☐ 1-4 months  
☐ More than 4 months

Do you have a 9-month or 12-month appointment?  
☐ 9-month    ☐ 12-month

On average, how many hours per WEEK will be devoted to this activity for the anticipated duration of the activity within the current fiscal year, ending June 30th?

Identify any classes, meetings, or other University duties that will be missed because of involvement in the proposed activity and state what arrangements have been made to cover any such duties.

### 4) University Resources

Will this activity use any University resources (personnel, products, facilities, equipment, administrative infrastructure (e.g. IRB), etc)?  
☐ Yes    ☒ No

### 5) Additional Information

To your knowledge, is the external entity/contracting organization a lobbyist principal under Chapter 163A (Elections and Ethics Enforcement Act) of the North Carolina Statutes?  
☐ Yes    ☐ No

☐ Check here if you have any additional information that is relevant to this disclosure.

☐ I certify that the information provided above is complete and accurate to the best of my knowledge.

**Save and Certify**

- a. Note: A “Yes” response to will trigger requests for additional information.
- b. Screen showing EPAP with prior information about the contracting organization:

**6) Ownership/Equity Interest**

Do you or a family member currently hold or plan to hold equity interest in an entity or vendor related to this activity. Please exclude mutual funds and blind trust funds from your answer unless you have direct control over the investments.

☒ Yes ☐ No

Source	Entity	Equity Type	Public Value	Private %	
Self	Chapel Hill-Carrboro City Schools	Public	\$20,000,000.00		<a href="#">Edit</a> <a href="#">Delete</a>

[Add more entries](#)

**7) Gifts**

Has an entity or vendor related to this activity given a gift to the University, or affiliated foundations where the gift was designated for your benefit, your family members, your research or your research team?

☒ Yes ☐ No

Entity	Value	Explanation	
Chapel Hill-Carrboro City Schools	\$5,000.00	test	<a href="#">Edit</a> <a href="#">Delete</a>

[Add more entries](#)

- c. Click “Delete to remove” the information
- d. Click “Edit” to modify the information
- e. Click “Add more entries” button to display a pop-up screen where you can provide detailed information

*Note: If you are disclosing more than one organization, you will need to complete an EPAP for each one.*

- Once you have completed your disclosure, the system will display the EPAP Status page

**Item List**

1. Discloser Information ☒
2. Disclosure Questions ☒
3. Disclosure Status ☒

**>> Notice of Intent to Engage in External Professional Activities for Pay - EPAP Status**

[Duplicate Disclosure](#)
[Quick View \(HTML\)](#)
[PDF](#)
[Delete Disclosure](#)

AIR Number: 19-01060	Disclosure Type: EPAP
Status: Certified	Discloser: Martina Gargard

Thank you for completing this disclosure.

[Routing](#)
[Attachments](#)
[EPAP Email Log](#)

Department or Administrator that must review this disclosure for EPAP

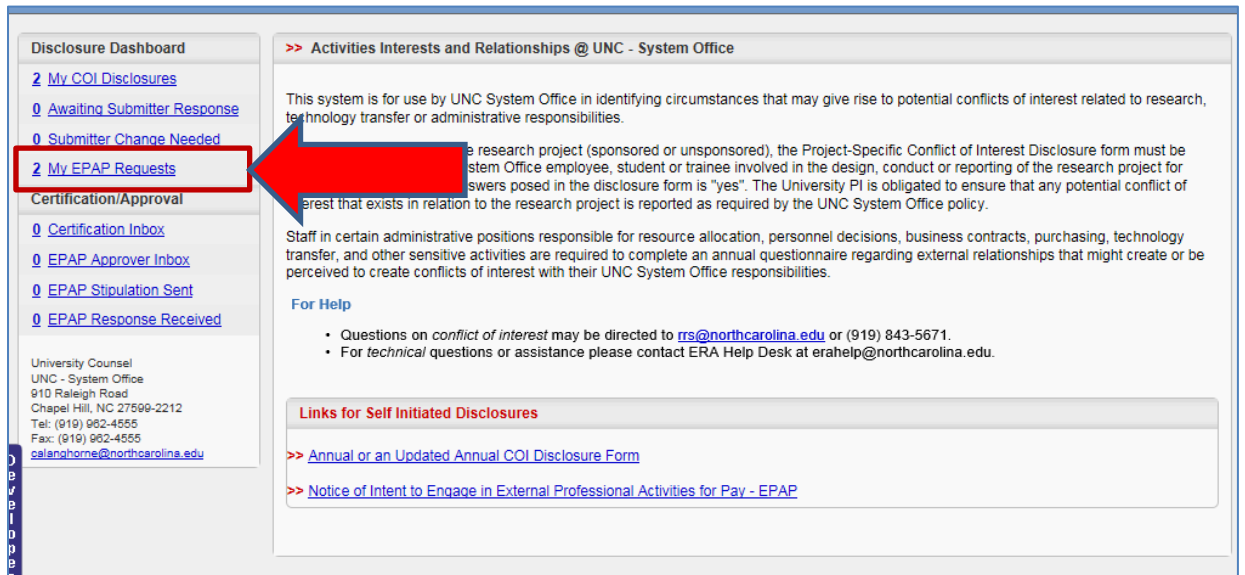
Department/Admin	Reviewer(s)	Decision
Human Resources	CONNIE LONG, ROBERTA SNUGGS	Not yet reviewed ( <a href="#">Resend Notification</a> )

**Status History**

Status	Name	Date
Certified	Martina Gargard	10/01/2018 02:54 PM
Submitted	Martina Gargard	10/01/2018 02:54 PM
Created	Martina Gargard	10/01/2018 02:50 PM

- a. Click the “Attachments” tab and upload any supporting documentation
- b. **President, SVPs, and VPs** should complete the **Ethics Form** under the Help menu and attach it on the Attachments tab

- **After your EPAP request is submitted,**
  - You should receive an email confirmation about the EPAP
  - The EPAP Staff, your manager and/or Legal Affairs will contact you with questions/updates when processing your EPAP request.
  - When the EPAP Office (and all other parties) finish the review, you will receive an email confirmation stating the process is complete.
  - If you have a potential conflict that needs to be addressed immediately, please contact Robbie Snuggs at [rrs@northcarolina.edu](mailto:rrs@northcarolina.edu) or (919)843-5671.
  
- **Check the status of your disclosure and review prior disclosures at any time by:**
  - a. Logging into AIR
  - b. Navigating to the Home page
  - c. Locating the Disclosure Dashboard on the left side of the screen
  - d. Clicking on “My EPAP Requests” link








- The “My EPAP Requests” page shows the list of all your EPAPs. You can:
  - a. Click the ID/AIR # to view the EPAP
  - b. Click the Duplicate link to create a new EPAP from a current one

>> My EPAP Requests

Incomplete (5) In Process (16) Complete (0)

**Incomplete Disclosures**

#	ID/AIR #	AIR Type	Title	Sponsor	Date Created	Date Submitted	Status	
1	<a href="#">19-00060</a>	EPAP	test	Chapel Hill-Carrboro City Schools	9/28/2018	9/28/2018	Created	 <a href="#">Duplicate</a>
2	<a href="#">19-00057</a>	EPAP	test	Maconstar	9/28/2018	9/28/2018	Created	 <a href="#">Duplicate</a>
3	<a href="#">19-00004</a>	EPAP	test	Chapel Hill-Carrboro City Schools	7/2/2018	7/2/2018	Created	 <a href="#">Duplicate</a>
4	<a href="#">18-00039</a>	EPAP	testing	Maconstar	6/20/2018	6/20/2018	Created	 <a href="#">Duplicate</a>
5	<a href="#">18-00037</a>	EPAP	Testing	Maconstar	6/20/2018	6/20/2018	Created	 <a href="#">Duplicate</a>

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