

**Annual Outside Employment Disclosure for Senior Management
Adobe Sign Filing Process – HEERA Manager’s Guide**

[California law](#) and [CSU Policy](#) require all Management Personnel Plan (MPP) employees, including part-time, full-time and rehired annuitants, to disclose any compensated outside employment activities by completing the Outside Employment Disclosure form at various times, including once a year. The employee’s disclosure is then reviewed by their HEERA manager to determine if any disclosed outside employment poses a conflict of commitment or a conflict of interest with their CSU employment. If there is, the employee must take actions to reduce or eliminate the conflict. Any disagreement between the employee and their HEERA manager on whether a conflict exists or on how to reduce or eliminate the conflict would be determined by an independent review committee. The committee’s review is initiated following the HEERA manager’s consultation with HR Policy.

For a detailed explanation of the HEERA manager’s role in the review of any disclosed outside employment, go to [Forms](#).

Annually, the Outside Employment Disclosure is filed electronically through Adobe Acrobat Sign (Adobe Sign). As the HEERA Manager of an MPP employee, you will receive an annual Outside Employment Disclosure to review and complete. Below are instructions to help you navigate through the Adobe Sign filing process.

Contents

Quick Guide – Submitting a Disclosure.....	2
Quick Guide – Correcting Information Entered.....	2
Quick Guide – Viewing Completed Form	2
Detailed Guide - Submitting a Disclosure	3
Detailed Guide – Viewing Completed Form	8

Quick Guide – Submitting a Disclosure

- Go to your Outlook Inbox and look for the email from Cal Poly Pomona PolyDoc via Adobe Acrobat Sign adobesign@adobesign.com with the subject line “Ex: Signature requested on “HRS – Outside Employment Disclosure Form – Senior Management . . .” In the email, click on “review and sign.” The form that is awaiting your review and completion will open in Adobe Sign.
- Review the information disclosed by the employee and assess whether any disclosed outside employment poses a conflict of commitment or a conflict of interest with the employee’s CPP position. Choose from the two available choices to indicate what your assessment is.
- If your assessment is that the outside employment poses a conflict of interest or commitment with the employee’s CPP job, document on the form the measures that the employee has agreed to take to reduce or eliminate the conflict.
- Sign the form. Then click on “Click to Sign.”
- A message pops up confirming that you’ve finished the filing process.
- Once you sign the form, both you and the employee will receive an Outlook email from CSU- California State University Pomona via Adobe Acrobat “sign adobesign@adobesign.com with the subject “Ex: Completed: “HRS – Outside Employment disclosure form – Senior Management . . .”

Quick Guide – Correcting Information Entered

- You can only correct any information that you have entered on the form **before** you click on “Click to Sign.”
- After you click on “Click to Sign,” neither you nor anyone else can correct an error you made. At that point, you must request the employee to start a new form in order for you to correct any information you erroneously entered.

Quick Guide – Viewing Completed Form

- In the email you received from CSU- California State University Pomona via Adobe Acrobat “sign adobesign@adobesign.com with the subject “Ex: Completed: “HRS – Outside Employment disclosure Form – Senior Management . . .,” click on “Open Agreement” in the email to view the completed form in Adobe Sign.

Detailed Guide - Submitting a Disclosure

Step 1: Look for the Outlook email that you received from Cal Poly Pomona PolyDoc via Adobe Acrobat Sign adobesign@adobesign.com with the subject “Ex: Signature requested on “HRS – Outside Employment Disclosure Form – Senior Management . . .”

Open the email and click on “Review and sign.”

Ex: Signature requested on "HRS - Outside Employment Disclosure Form - Senior Management



Cal Poly Pomona PolyDoc via Adobe Acrobat Sign <adobesign@adobesign.com>
To Ellen Bui

CalPolyPomona | Powered by **Adobe Acrobat Sign**

Cal Poly Pomona PolyDoc requests your signature on
HRS - Outside Employment Disclosure Form - Senior Management (Annual)

Review and sign

After you sign **HRS - Outside Employment Disclosure Form - Senior Management (Annual)**, all parties will be notified.

Don't forward this email: If you don't want to sign, you can **delegate** to someone else.

Step 2: Review the information disclosed by the employee and assess whether any disclosed outside employment poses a conflict of commitment or a conflict of interest with the employee’s CPP position. Choose from the two available choices to indicate what your assessment is.

NOTE: if you need additional information to make a reasoned assessment, you may request the employee to provide more information.

2.a. If there is no disclosed outside employment or if you assess that the disclosed outside employment does not pose a conflict of interest or commitment, click on “the information submitted does not present a conflict of commitment or conflict of interest.” Sign the form. Then click on “Click to Sign.”

Outside Employment/Activity 2:

1. Name of outside employer or business: University Publishing, Inc.
2. Duration of employment (From/To): July 2023
3. Describe the nature of the outside employment: review manuscript of a textbook on civil engineering
4. Number of hours for reporting period: 12
5. Total compensation received including equity or deferred compensation: \$1,000.
6. Does the outside employer have any business dealings with CSU? Yes No If “yes”, please explain: _____
7. Are you involved in making any decisions affecting CSU’s dealings with the outside employer (either directly or indirectly)? Yes No If “yes”, please describe: _____
8. Additional comments (e.g., if compensation was donated, disclose here): _____

6. Certification and Review

To be completed by the Employee:

I hereby affirm that the information on this form is accurate to the best of my knowledge, that I have read and understand my obligations under the CSU’s policy on Outside Employment Disclosure, and that I will comply with the conditions and restrictions imposed by the CSU to manage, reduce, or eliminate conflicts of commitment/interest. I certify that my time commitment to the outside employer(s), if applicable, does not create a conflict of commitment/interest that would interfere with CSU work assignments and satisfactory performance. I also commit to providing an updated form to my immediate supervisor whenever a significant change occurs in the information I have provided.

Jane White
www.whitehr.com 2024-05-29 10:00 am
Signature

05/29/2024
Date

To be completed by the Employee’s Immediate Supervisor/Appropriate Administrator:

I have reviewed this disclosure form and assessed whether the outside employment described above will create a conflict of commitment or interest between the employee and the CSU. I find that:

- the information submitted does not present a conflict of commitment or conflict of interest.
- the information submitted may present a conflict of commitment or a conflict of interest.

If an independent committee review is sought for a vice president’s outside employment disclosure, the President’s Office shall contact HR Policy & Audit Readiness (hrpolicy@cpp.edu) before signing the form for guidance on next steps.

Administrator’s Name (Print): John Doe Title, Dept: Dean, College of Engineering

John Doe
John Doe (May 29, 2024)
Signature

05/29/2024
Date

CPP Email: i@cpp.edu

By signing, I agree to this document, the [Consumer Disclosure](#) and to utilize electronic signatures. **Click to Sign** ←

2.b. If you assess that the disclosed outside employment poses a conflict of interest or commitment, you must have a discussion with the employee outside of the Adobe Sign filing process regarding the measures that the employee will take to reduce or eliminate the conflict. After reaching an agreement with the employee on these measures, you must document the agreement by following these steps in the Adobe Sign filing process:

1. Click on “the information submitted may present a conflict of commitment or a conflict of interest.”

To be completed by the Employee’s Immediate Supervisor/Appropriate Administrator:

I have reviewed this disclosure form and assessed whether the outside employment described above will create a conflict of commitment or interest between the employee and the CSU. I find that:

- the information submitted does not present a conflict of commitment or conflict of interest
- the information submitted may present a conflict of commitment or a conflict of interest.

2. A box opens below this radial button with the message “Below, explain how the conflict will be mitigated or eliminated.” In the box, enter a description of the measures that the employee has agreed to take to reduce or eliminate the conflict.

To be completed by the Employee’s Immediate Supervisor/Appropriate Administrator:

I have reviewed this disclosure form and assessed whether the outside employment described above will create a conflict of commitment or interest between the employee and the CSU. I find that:

- the information submitted does not present a conflict of commitment or conflict of interest.
- the information submitted may present a conflict of commitment or a conflict of interest.

Below, explain how the conflict will be mitigated or eliminated.

3. Sign the form.
4. Click on “Click to Sign” to complete your filing.

The screenshot below summarizes the 4 steps.

Outside Employment/Activity 2:

1. Name of outside employer or business: University Publishing, Inc.
2. Duration of employment (From/To): July 2023
3. Describe the nature of the outside employment: review manuscript of a textbook on civil engineering
4. Number of hours for reporting period: 12
5. Total compensation received including equity or deferred compensation: \$1,000.
6. Does the outside employer have any business dealings with CSU? Yes No If "yes", please explain: _____
7. Are you involved in making any decisions affecting CSU's dealings with the outside employer (either directly or indirectly)? Yes No If "yes", please describe: _____
8. Additional comments (e.g., if compensation was donated, disclose here): _____

6. Certification and Review

To be completed by the Employee:

- I hereby affirm that the information on this form is accurate to the best of my knowledge, that I have read and understand my obligations under the CSU's policy on Outside Employment Disclosure, and that I will comply with the conditions and restrictions imposed by the CSU to manage, reduce, or eliminate conflicts of commitment/interest. I certify that my time commitment to the outside employer(s), if applicable, does not create a conflict of commitment/interest that would interfere with CSU work assignments and satisfactory performance. I also commit to providing an updated form to my immediate supervisor whenever a significant change occurs in the information I have provided.

Jane White

Signature

05/29/2024

Date

To be completed by the Employee's Immediate Supervisor/Appropriate Administrator:

I have reviewed this disclosure form and assessed whether the outside employment described above will create a conflict of commitment or interest between the employee and the CSU. I find that:

- 1 the information submitted does not present a conflict of commitment or conflict of interest.
- the information submitted may present a conflict of commitment or a conflict of interest.

Jane has agreed to engage in outside employment activities only during the non-working hours of her CPP job. 2

If an independent committee review is sought for a vice president's outside employment disclosure, the President's Office shall contact HR Policy & Audit Readiness (hrpolicy@cpp.edu) before signing the form for guidance on next steps.

Administrator's Name (Print): John Doe Title, Dept: Dean, College of Engineering

John Doe

Signature

05/29/2024

Date

CPP Email: _____i@cpp.edu

By signing, I agree to this document, the [Consumer Disclosure](#) and to utilize electronic signatures.

4

Click to Sign

Step 3: A message pops up in Adobe Sign indicating that the filing process is completed.

Powered by
Adobe
Acrobat Sign

 **You're all set**

You finished signing "HRS - Outside Employment Disclosure Form - Date After January 1)".

All parties will be notified via email. You can also [download a copy](#) of signed.

Manage your Acrobat Sign agreements

[Sign In](#)


Detailed Guide – Viewing Completed Form

Both you and the employee will receive an Outlook email from CSU- California State University Pomona via Adobe Acrobat “sign adobesign@adobesign.com with the subject “Ex: Completed: “HRS – Outside Employment disclosure Form – Senior Management . . .” Click on “Open Agreement” in the email to view the completed form in Adobe Sign.


Ex: Completed: "HRS - Outside Employment Disclosure Form - Senior Management




CSU - California State University Pomona via Adobe Acrobat Sign <adobesign@adobesign.com>
To Ellen Bui; Polydoc Support and Administration; Ellen Bui



Powered by
**Adobe
Acrobat Sign**



All parties finished
**HRS - Outside Employment Disclosure Form - Senior
Management (Annual)**

Open agreement 

The agreement is completed between:

- CSU - California State University Pomona
- Jane White
- John Doe

You can **open the final agreement** to review its activity history or download a copy for reference.

The agreement is fully executed. The sender of this agreement has control over the retention period for this agreement which determines the amount of time it will be available for download from Adobe Acrobat Sign. Adobe recommends that you save a local copy of this fully-executed agreement for your records.