

## Types of Relationships

Description of the types of relationships which can be listed in the Outside Activity and Interest Reporting (OAIR) system. For examples of what to include or exclude, scope of the policy expectations, and for further school-based guidance, visit the site: [Office of the Vice Provost for Research](#)

Term	Definition
Editorial Services	Any work, compensated or uncompensated, serving as an editor in any role (journal editor, associate editor, etc.) or as a member of an editorial advisory board for a peer-reviewed journal published by a commercial entity. Note that participating in peer review of submissions will ordinarily not constitute an “outside activity.”
Equity (shares/options) or Ownership Interest	<ul style="list-style-type: none"> <li>○ All types of equity, including (but not limited to): stocks, stock options, or ownership interest in a start-up company, even if the company currently does not have any value (a “paper company”).</li> <li>○ Excludes investments in a mutual fund, pension, or other institutional investment vehicles in which you do not exercise control over the investments made.</li> </ul>
Fiduciary Board Membership	<ul style="list-style-type: none"> <li>○ Fiduciary Board membership, including Board of Directors, Board of Trustees, Board of Governors, Principal, and Board of Managers</li> <li>○ Excludes Scientific Advisory Board membership</li> </ul>
Inventorship/Authorship on Intellectual Property (license/royalties)	Intellectual property rights and interests (e.g., patents, copyrights), including any income received from the inventor/author's share of any royalties, license fees, maintenance fees, or milestone payments.
Prizes or Awards	Prizes and awards received directly and not processed through Harvard.
Professional Services or Employment	<ul style="list-style-type: none"> <li>○ Collection of one or more types of outside activities</li> <li>○ This parent category includes: <ul style="list-style-type: none"> <li>○ Architecture, planning, and design services</li> <li>○ Conference organized or chaired</li> <li>○ Consulting</li> <li>○ Employment</li> <li>○ Research or teaching appointment</li> <li>○ Executive Employment</li> <li>○ Expert witness service</li> <li>○ Fellowship or artist's residencies</li> <li>○ Membership on a scientific advisory board</li> <li>○ Non-US government services (including testimony)</li> <li>○ Office in professional organization</li> <li>○ Paid external reviewer</li> <li>○ Paid media appearance</li> <li>○ Professional jury or exhibition</li> <li>○ Speaking engagement, invited lecture, or presentation</li> <li>○ Talent recruitment or development program.</li> </ul> </li> </ul>
Professional Services or Employment: <i>Architecture, planning, and design services</i>	<ul style="list-style-type: none"> <li>○ Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>○ Planning, providing preliminary studies, designs, drawings, specifications, administration and other technical activities.</li> </ul>
Professional Services or Employment: <i>Conference organized or chaired</i>	Choose “Professional Services or Employment” to then indicate this activity/relationship.

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Professional Services or Employment: <i>Consulting</i>	Choose “Professional Services or Employment” to then indicate this activity/relationship.
Professional Services or Employment: <i>Executive Employment</i>	<ul style="list-style-type: none"> <li>○ Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>○ Any position that is responsible for a material part of the operation or management of a business.</li> <li>○ Specifically includes, but is not limited to, the following positions: Chief Executive Officer, Chief Operations Officer, Chief Scientific Officer, Chief Medical Officer, Scientific Director, and Medical Director.</li> </ul>
Professional Services or Employment: <i>Employment</i>	<ul style="list-style-type: none"> <li>○ Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>○ Appointment, affiliation, or employment agreement with any outside entity, foreign or domestic</li> </ul>
Professional Services or Employment: <i>Research or teaching appointment</i>	<ul style="list-style-type: none"> <li>○ Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>○ Appointment or affiliation with any outside entity, foreign or domestic</li> <li>○ Research or association with a sponsored award on behalf of a program outside of Harvard</li> <li>○ Teaching outside of Harvard</li> </ul>
Professional Services or Employment: <i>Expert witness service</i>	Choose “Professional Services or Employment” to then indicate this activity/relationship.
Professional Services or Employment: <i>Fellowship or artist’s residencies</i>	Choose “Professional Services or Employment” to then indicate this activity/relationship.
Professional Services or Employment: <i>Membership on a scientific advisory board</i>	<ul style="list-style-type: none"> <li>○ Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>○ Testifying as an expert in a formal judicial proceeding, or preparing a brief for a court as an amicus curiae (friend of the court), in the discloser’s personal capacity.</li> </ul>
Professional Services or Employment: <i>Non-US government services (including testimony)</i>	<ul style="list-style-type: none"> <li>○ Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>○ Including candidate for public office or an employee, official of, or acting in an official capacity on behalf of, any government, department, or agency outside of the U.S.</li> </ul>
Professional Services or Employment: <i>Office in professional organization</i>	<ul style="list-style-type: none"> <li>○ Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>○ President, secretary, executive director, member of certification committee or accreditation committee for profession or discipline.</li> </ul>
Professional Services or Employment: <i>Paid external reviewer</i>	<ul style="list-style-type: none"> <li>○ Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>○ Review of an organization or program to provide results or feedback.</li> </ul>
Professional Services or Employment: <i>Paid media appearance (may include written, audio, video, or other digital format)</i>	<ul style="list-style-type: none"> <li>○ Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>○ As noted, may include written, audio, video, or any other digital formats.</li> </ul>
Professional Services or Employment: <i>Professional jury or exhibition</i>	Choose “Professional Services or Employment” to then indicate this activity/relationship.

Term	Definition
Professional Services or Employment: <i>Speaking engagement, invited lecture, or presentation</i>	<ul style="list-style-type: none"> <li>Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>Formal talk excluding for US federal, state, or local government entities or US-based institutions of higher education and affiliated medical centers. Note that non-US government agencies and institutions of higher education need to be included.</li> </ul>
Professional Services or Employment: <i>Talent recruitment or development program</i>	<ul style="list-style-type: none"> <li>Choose “Professional Services or Employment” to then indicate this activity/relationship.</li> <li>Defined by <a href="#">DOE O 486.1</a></li> </ul>
Reimbursed Travel (including travel paid on your behalf, by a third party)	<ul style="list-style-type: none"> <li>Externally paid travel that is not processed through Harvard.</li> <li>Excludes travel reimbursements that total less than \$5,000 from a single source within a twelve-month period or that come from a U.S. federal, state, or local government agency or a U.S. institution of higher education or affiliated medical center.</li> </ul>

### Other Outside Activity and Interest Reporting Terms

Included in the table below are terms used commonly in conflict of interest and outside activity reporting and in the Outside Activity and Interest Reporting (OAIR) system. Policy based definitions can be found with the appropriate policy, visit the site: [Office of the Vice Provost for Research](#).

Term	Definition
Certification	<ul style="list-style-type: none"> <li>A submission type which contains confirmation of institutional responsibilities, validation that the information is correct, and if applicable, or one or more disclosures.</li> <li>Can be a reason or “trigger” for re-stating or re-reviewing a person’s disclosures (i.e. annual or research based).</li> <li>May have one or many associated disclosure records.</li> <li>Note: In some cases, this term is used in other compliance areas.</li> </ul>
Disclose	<ul style="list-style-type: none"> <li>See policy documents linked at <a href="http://vpr.harvard.edu/oair">vpr.harvard.edu/oair</a> for policy definition</li> <li>In the system, disclose: <ul style="list-style-type: none"> <li>Sharing outside activity or interest based on the external organization, institution, or entity relationship.</li> <li>Is action taken within/as part of an annual (initial or updated) or research-based certification.</li> </ul> </li> </ul>
Disclosure	<ul style="list-style-type: none"> <li>See policy documents linked at <a href="http://vpr.harvard.edu/oair">vpr.harvard.edu/oair</a> for policy definition</li> <li>In the system, a disclosure: <ul style="list-style-type: none"> <li>Is a single record, indicating the external organization, institution, or entity, along with information about the nature of the relationship such as, any value, payments, time spent providing services, or activities conducted.</li> <li>Is entered, starting with the entity or organization relationship and is associated with a certification.</li> </ul> </li> </ul>
History	<ul style="list-style-type: none"> <li>Workspace tab that shows an audit trail of review actions completed on the certification.</li> <li>Records name and date of activity, with author.</li> </ul>
My InBox	<ul style="list-style-type: none"> <li>Page that contains “to-do list” for the discloser.</li> <li>Also referred to as a Dashboard.</li> </ul>

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<b>Term</b>	<b>Definition</b>
SmartForm	A series of web pages which contain form fields that are organized to display step-by-step context-relevant information, and only show required questions based on responses.
State	Synonymous to review status (e.g. Administrative Review is a workflow state)
Workspace	Landing area/web page for the submission that contains links, status images, and tabs of information