
Section A – Introduction to *Review*

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About AP On-Line

AP On-Line is a UCSD business system for electronically processing academic personnel actions. It is a suite of services that currently includes AP On-Line *e-Recruitment Plan* (for submitting recruitment plans), AP On-Line *Recruit* (an online job application system), and AP On-Line *Review* (for processing review files).

AP On-Line is being developed in phases and eventually will allow processing of all academic personnel actions, from recruitments to separations, including all review actions and all types of leaves.

This manual deals only with *Review*. Separate user guides for *e-Recruitment Plan* and *Recruit* are available on the AP On-Line [User Information page](#) on the Academic Personnel Services Web site.

As new functions are added to *Review* in future phases, training information will be added to this manual until the system is complete.

Accessing *Review*

In order to access *Review*, you must be registered for Single Sign-On, UCSD's "gatekeeper" for access to campus business systems. If you are not yet registered, instructions for registering are available on Blink at:

<http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,14006,00.html>

Single Sign-On requires a user I.D. and a password. *It is extremely important not to share your password with anyone, because doing so allows them access to all your personal information, as well as the information in *Review*.*

You also need to be assigned a "role" in *Review* (see below), which will determine what materials you can see and what actions you can take.

Once you are registered for Single Sign-On and have been assigned a role, you can log on to *Review* at <https://www-act.ucsd.edu/apol/>

Links to *Review* and the other AP On-Line services are also available on the [Academic Personnel Services home page](#).

Assignment of roles in Review

The role you are assigned in *Review* determines which tasks you can perform and which screens you can see.

Department Security Administrators (DSAs) are responsible for assigning the roles of Department Chair, Department Staff, Dean, and Dean Staff.

The Candidate role is automatically assigned to academics for whom Academic Personnel Services is the office of record. This is done via a data table maintained by APS. New academic appointees receive access to *Review* as soon as they are assigned a UCSD employee ID number.

A few roles are assigned temporarily for the purpose of processing a single file. These roles are Department Ad Hoc Member and Voting Faculty, which are assigned by the Department Staff or Department Chair; and the Candidate Alternate role, which is assigned by the Candidate.

The roles currently available are listed below. More roles will be added in future phases.

- ▶ **“Role families” are pairs of roles in which one role can replace or delete documents uploaded by the other. Role families are indicated by brackets.**

Candidate: The role assigned to the academic appointee under review.

Candidate Alternate: The role assigned to a person chosen by the Candidate to assist with compiling and uploading documents for the review file. This person should be a faculty assistant, if possible. A Candidate may designate more than one Candidate Alternate.

Department Staff: The role assigned to department staff members responsible for assembling and processing review files. More than one person in a department may be assigned this role.

Department Chair: The role assigned to the actual Department Chair. Only this role can sign departmental recommendation letters.

Department Ad Hoc: The temporary role assigned by the Department Chair or Department Staff to faculty members serving on ad hoc committees.

Voting Faculty: The temporary role assigned by the Department Chair or Department Staff to faculty members eligible to vote on a particular file.

Dean Staff: The role assigned to Deans' staff members responsible for screening incoming review files and coordinating Deans' assessment of and action on these files.

Dean: The role assigned to the actual Dean. Only this role can sign the Dean's final action letter or recommendation letter.

CAP Chair: The role assigned to the current CAP chair. Only this role can sign CAP recommendation letters.

CAP Staff: The role assigned to Academic Senate personnel who assist the Committee on Academic Personnel.

CAP Member: The role assigned to current CAP members.

APQ: The role assigned to Academic Personnel Services staff members.

EVC: The role assigned to the current Executive Vice Chancellor for Academic Affairs. Only the EVC role can sign letters requesting additional information, preliminary decision letters, and EVC final action letters.

Types of files that can be processed in Review

The chart below lists the actions currently available in AP On-Line *Review*.

Please note that the following actions cannot yet be processed in *Review*, but will be added in future phases of development:

- Actions for academics with joint appointments or split appointments
- Actions for series that are reviewed by campus-level panels/committees other than CAP (e.g., AARP, PSSRP)
- Actions for series that are reviewed by CAP and are Dean's Authority (e.g. Research Scientist, Continuing Lecturers)
- Actions requiring review by a reviewing body for which there is not yet a role in Review (e.g., SOM CAP, SSPPS CAP, SIO CAP)
- Career equity reviews (CER)
- Terminal reappointment
- Retention or pre-emptive retention

Action code in AP On-Line Review	Description of Action
Merit	
ABOVE-SCALE MERIT	Merit advancement to an above-scale salary (Action always requires campus review)
ACCEL ABOVE-SCALE MERIT	Accelerated merit to an above-scale salary (Action always requires campus review)
ACCEL FURTHER ABOVE-SCALE MERIT	Accelerated merit for candidate who already has an above-scale salary (Action always requires campus review)
ACCEL MERIT	Accelerated merit (Action always requires campus review)

ACCEL MERIT + OFFSCALE	Accelerated merit with a market offscale salary component (Action always requires campus review, regardless of whether MOS is new, maintained [less than 6 years old], or requires a 6th-year review)
FURTHER ABOVE-SCALE MERIT	Normal merit advancement for a candidate who already has an above-scale salary (Action always required campus review)
MERIT – CAMPUS REVIEW	Normal merit (at any rank) requiring campus review
MERIT - CONTESTED	Dean disagrees with department's proposed action, and the file becomes a Campus Review action
MERIT – DEAN'S AUTH	Uncontested normal merit at Associate or Full rank (If dean agrees with action proposed by department, it is "uncontested")
MERIT + OFFSCALE – DEAN'S AUTH	Dean's authority normal merit, with maintenance of the market offscale salary component
MERIT + OFFSCALE – CAMPUS REVIEW	Any normal merit with a new market offscale salary component.
Reappointment and merit	
ACCEL REAPPT/MERIT	Accelerated reappointment and merit (Action always requires campus review)
ACCEL REAPPT/MERIT + OFFSCALE	Accelerated reappt and merit with an offscale salary component (Action always requires campus review)
REAPPT/MERIT – CAMPUS REVIEW	Uncontested reappointment/normal merit after first review at Assistant rank
REAPPT/MERIT – DEAN'S AUTH	Uncontested reappointment/normal merit at first review at Assistant rank, and reappointment/normal merit for appointees with term end dates in all ranks
REAPPT/MERIT + OFFSCALE – CAMPUS REVIEW	Reappointment and normal merit with a new market offscale salary component

REAPPT/MERIT + OFFSCALE – DEAN'S AUTH	Dean's authority reappointment/normal merit, with maintenance of the market offscale salary component
Reappointment/Merit/Appraisal	
APPRAISAL	Appraisal of candidate's career to date (Always requires a campus review)
ACCEL REAPPT/MERIT/APPRAISAL – CAMPUS REVIEW	Reappointment, accelerated merit, and appraisal of candidate's career to date
ACCEL REAPPT/MERIT/APPRAISAL + OFFSCALE – CAMPUS REVIEW	Reappointment, accelerated merit, and appraisal of candidate's career to date, with a market offscale salary component.
REAPPT/MERIT/APPRAISAL – CAMPUS REVIEW	Reappointment, normal merit, and appraisal of candidate's career to date
REAPPT/MERIT/APPRAISAL + OFFSCALE – CAMPUS REVIEW	Reappointment, normal merit, and appraisal of candidate's career to date, with a market offscale salary component.
REAPPT/APPRAISAL – CAMPUS REVIEW	Reappointment and appraisal of candidate's career to date
REAPPT/APPRAISAL + OFFSCALE – CAMPUS REVIEW	Reappointment and appraisal of candidate's career to date, with a market offscale salary component.
Promotion	
ACCEL PROMOTION	Accelerated promotion (Action always requires campus review)
ACCEL PROMOTION + OFFSCALE	Accelerated promotion with an offscale salary component (Action always requires campus review)
PROMOTION	Promotion

	(Action always requires campus review)
PROMOTION + OFFSCALE	Promotion with an offscale salary component (Action always requires campus review)
No change	
NO CHANGE – CAMPUS REVIEW	Uncontested No Change after first review at Assistant rank, contested No Change at any rank, second consecutive No Change at any rank
NO CHANGE – DEAN'S AUTHORITY	Uncontested No Change at first review at Assistant rank, and uncontested No Change at Associate and Full ranks
Reappointment only	
REAPPOINTMENT – CAMPUS REVIEW	Reappointment after first review at Assistant rank
REAPPOINTMENT – DEAN'S AUTH	Reappointment at first review at Assistant rank
To Be Determined	
TBD	Select this action when creating a file and the proposed file action is unknown.

Preparing documents for uploading into review file

Review file documents (employment history, teaching evaluations, etc.) must be created outside *Review*. You can create a Word document, convert it to a PDF file, and upload the PDF into the online review file. *This is the preferred method*, since converted Word documents are searchable, and CAP and other reviewers frequently want to search files for specific information. You can also scan an existing paper document to create a PDF and upload that PDF, but scanned documents are not searchable.

The complete instructions for uploading PDFs into a review file are provided in the File Preparation section of this manual.

It is important to name PDFs in a way that lets you and others easily identify them. For example, the names for CAPE report PDFs should include the candidate's last name and the class name, number,

quarter, and year (e.g., JONES CAPE - CHEM 202 SP 09). This makes it clear what each document is and lets you easily determine whether documents are listed in the correct order in the online file.

Although it is possible to include multiple documents (e.g., several CAPE reports) in a single PDF, it is recommended that you not do so. Departmental recommendation letters often make references to specific documents, and it is easier for reviewers to locate an individual document in the file than to hunt for a specific section in a long PDF containing several documents.

There are also limitations on PDF size. In order to ensure that PDF documents are not unnecessarily large (thereby creating PDF bundling problems in *Review*), a size limit of 20 megabytes has been established for *each* PDF uploaded into *Review*. While it is important that PDFs not exceed this size limit, they still must be clear and readable. Guidelines for setting up your scanning hardware and software to keep document size to a minimum are provided in [Appendix 3](#), “Document Scanning Guidelines.”

- **Note:** Publications should *never* be uploaded as documents in the review file. They may either be submitted separately as paper documents, or you can store electronic documents in a “drop box” and create a link to it in the Bibliography section of the Biography and Bibliography form. Instructions for doing so are available on the [Forms and Examples](#) page of the Academic Personnel Services website (<http://academicaffairs.ucsd.edu/aps/advance-train/forms.html>). Open the “Reviews” drawer on this page, go to the “UCSD Biography and Bibliography” box (top row), and click “Submitting Publications Electronically.”

Individual documents vs. bundled documents

In the file preparation stage of the review process, when the review file is being constructed, documents are uploaded as individual PDFs that can be replaced as needed. However, once a Candidate certifies the file for departmental review, all the individual file documents are “bundled” into a single PDF (with a bookmark for each document), and individual documents can no longer be changed or replaced.

Candidate certifications

Just as for PDF files, Candidates are requested to sign certifications in *Review* at certain points during the review process in order to confirm that they are aware of their rights and that University procedures have been followed. The titles of the certifications in *Review* are different from those used in PDF files, and a new certification has been added.

For PDF files, three certifications are used:

- Certification A: Candidate’s certification statement for academic personnel review file prior to determination of departmental recommendation
- Certification B: Candidate’s certification statement for academic personnel review file after determination of departmental recommendation
- Certification C: Certification of materials added to academic personnel file after file has been forwarded to Academic Personnel Services

In *Review*, four certifications are used:

- Certification of Departmental Review: The Candidate electronically signs this certification to confirm that file is complete and ready for departmental review.
- Certification of Departmental Ad Hoc Report Access (new certification): If a departmental ad hoc committee report has been added to the file, the Candidate electronically signs this certification to verify that he or she has been offered access to a redacted version of the report.
- Certification of Departmental Recommendation Access: After the department has determined its recommendation, the Candidate electronically signs this certification to verify that he or she has been offered access to the departmental recommendation letter.
- Certification of Additional Materials: If new material is added to the online file after it has been submitted for review by CAP and the EVC, the Candidate signs this certification to verify that he or she is aware of the additions and has been offered access to them.

In *Review*, all certifications can be re-signed and replaced in the file as necessary. For example, if a new student testimonial letter is added to the file after the Candidate has already signed the Certification of Departmental Review, this certification should be re-signed and replaced.

Certifications are not included in the bundled review file; they are stored separately. However, you can see a listing of all notifications sent and all certifications signed, with a time and date stamp displayed for each, on the review file detail screen, as explained in more detail later in this manual.

Notifying other roles to take action

At certain points in the review process, one role (such as Department Staff) may need to notify another role (such as Candidate) that a certain action needs to be taken—for example, that a certification needs to be signed. At these points, the sender is prompted by *Review* to choose a notification type (e.g., “Notify Candidate Dept Rev Cert”) on a drop-down menu. The notification will appear in a pop-up window. It will contain required information that cannot be changed, but the sender can add details in a message box provided above the notification text.

- ▶ It is recommended that you *always* include your name and contact information in the message box.

Steps that must be completed outside *Review*

There are certain steps, such as notifying Candidates that they are due for review and conducting a faculty vote, that currently must be completed outside *Review* via e-mails, phone calls, or meetings. Such steps are **highlighted in yellow** in these instructions.

Some of these steps will be incorporated in *Review* in future phases. However, there will always be certain steps that will be completed outside the system for more sensitive management of personnel actions.

For example, the department will always notify the Candidate outside of *Review* that the departmental recommendation has been determined, and the Candidate may be invited to meet with the department chair in person to discuss the recommendation before the review proceeds.

How to get more help with *Review*

If you have general questions regarding completing academic personnel processes, please contact your dean's office.

If you have questions regarding technical issues or error messages in *Review*, or if you want to make an appointment for personal, on-site assistance from Academic Personnel Services staff via the AP Assists program, please call Ext. 40068.

To submit questions and receive a telephone or e-mail response, use the "Send Us Your Feedback" links at the bottom right-hand corner of each page of the AP On-Line *Review* application.