

Section D – Dean’s Review as Final Authority

This section includes:

| | |
|---|------|
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Note: As a “role family,” the Dean and Dean Staff roles can perform the same functions, except that only the Dean can sign letters. When either role can perform a particular function, the default in this manual is the Dean Staff role.

Dean Staff initial review of the file

When a file is submitted to the Dean’s office, the Dean Staff will check it for completeness, accuracy, and compliance with policy before the Dean reviews it for a final decision.

- ▶ When the department submits the file to the Dean, there is *no notification* to the Dean or Dean Staff roles. An exclamation point next to a file name on the Review File screen (see below) is the cue that action needs to be taken on that file. The Dean and Dean Staff roles must monitor the Review File screen to determine what files have been submitted for review and where they are in the review process.

1. Dean Staff inspection of file

- a. On the Review Files screen, the Dean Staff will click the Candidate’s name to open the review file detail screen. Note that the file status is Final Authority Review Pending.

| ACADEMIC PERSONNEL ONLINE | | | | | UC San Diego | |
|--|---|------------|----------|-------------------------------------|--------------------------------|--|
| Home | Review Files | Committees | AP Data | External Tools | | |
| Review Files Create New File | | | | | Show all files | |
| | | | | | Search: <input type="text"/> | |
| Alert | File Name | Dept Name | Div Name | Status | Last Action | |
| | YELLOW, Candidate - AccelMerit - 07_01_18 | YELLOW | BLUE | Accepted for Dean review | 06/14/17 | |
| | YELLOW, Candidate - MeritOSD - 07_01_18 | YELLOW | BLUE | Dean Final Authority Review Pending | 06/19/17 | |

- b. On the review file detail screen, a message will be displayed directing the Dean Staff to accept the file or return it to the department for corrections.

Home | **Review Files** | Committees | AP Data | External Tools

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type [Certs & Notifs](#) | [View File Tracking](#)

Status: Dean Final Authority Review Pending File Actions...

Accept or return to department

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW
 - COMMITTEE REVIEW
 - FINAL ACTION
 - Final Action Letter

- c. To inspect the file, the Dean Staff will click "Department" on the Select File Type drop-down menu and then click "View." (Note: The Department view contains any unredacted documents in the file, while the Candidate view contains only redacted versions of these documents.)

YELLOW, Candidate - MeritOSD - 07_01_18

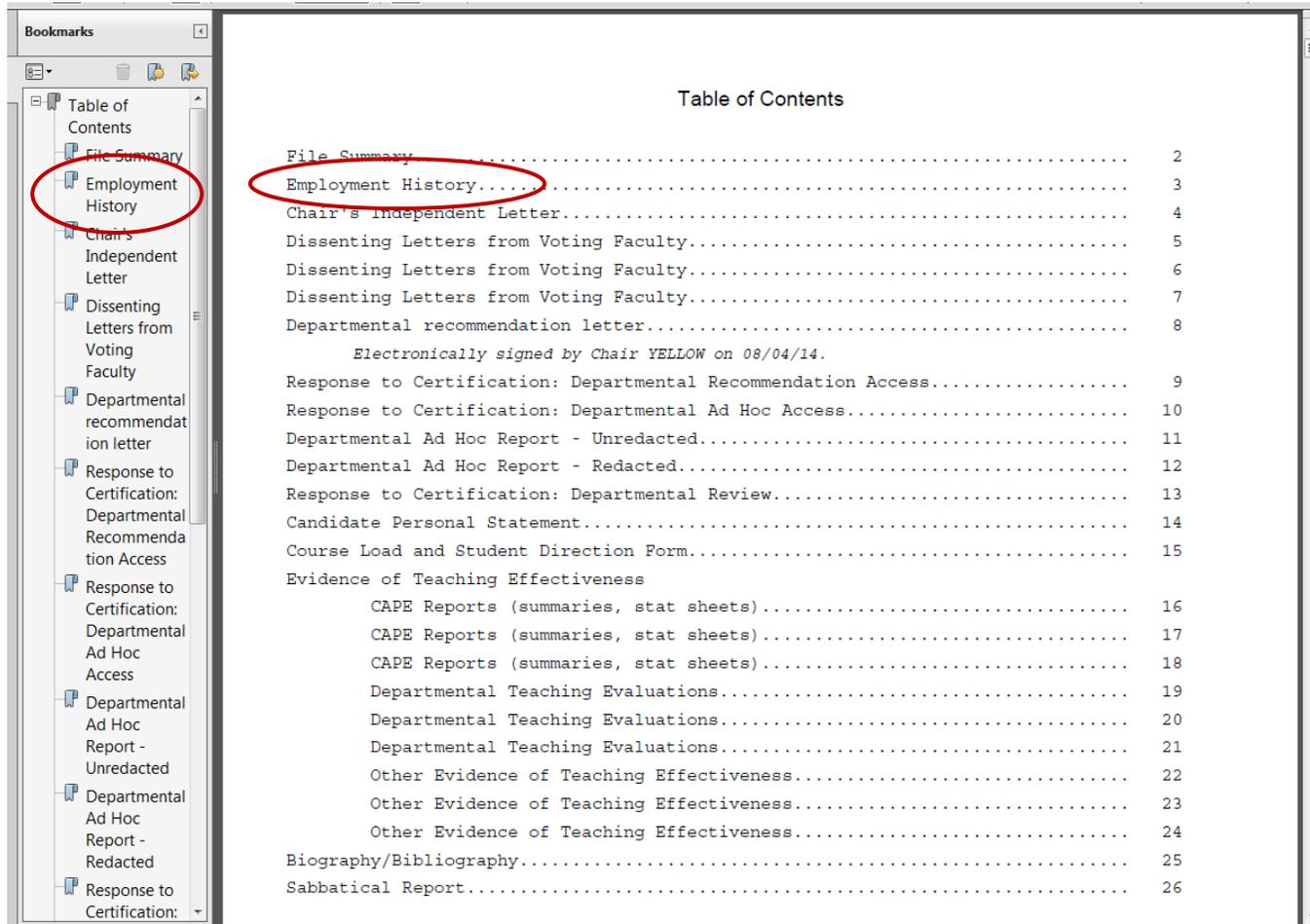
Select File Type [Certs & Notifs](#) | [View File Tracking](#)

Select File Type
Candidate
Department | Dean Final Authority Review Pending File Actions...

Accept or return to department

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW
 - COMMITTEE REVIEW

- d. The bundled PDF of the file will appear. The Dean Staff can navigate to any document by clicking the document name in either the Table of Contents or in the Bookmarks column, and then close the window to return to the review file detail screen.
- **Important:** During this inspection of the file, the Dean Staff should make a list of any minor corrections needed and the page numbers of the documents on which they occur. *This information will be needed for annotating the file in a later step.*



Returning the file to department for corrections

1. If the initial review of the file turns up substantive errors that cannot be handled via annotations (e.g., “Proposed” data is incorrect or a required document is missing), the Dean Staff will return the file to the department for corrections by highlighting “Return to Department” on the File Actions menu and clicking “Confirm.”

Home | **Review Files** | Committees | AP Data | External Tools

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type | View | [Certs & Notifs](#) | [View File Tracking](#)

Status: Dean Final Authority Review Pending

Accept or return to department

+ FILE PREPARATION
+ DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW

Return to Department | **Confirm**
File Actions...
Accept for Dean Review
Return to Department

2. The Dean's office will inform the department outside Review what corrections or additions are needed. The department will not receive an e-mail notification.

Department makes requested corrections

1. On the review file detail screen, the status will be "File returned to Dept. by Dean's Office," and there will be a red text box containing instructions to the department.

Home | **Review Files** | Committees | AP Data | External Tools

YELLOW, Candidate - MeritOSD - 07_01_18

[Certs & Notifs](#) | [View File Tracking](#)

Status: File returned to Dept. by Dean's Office

File Actions... | Confirm

+ FILE PREPARATION
- DEPARTMENTAL REVIEW
- COMMITTEE REVIEW

- Yellow's Review Committee (Ad Hoc Confidential) COMPLETE
 - Yellow's Review Committee Bundle | Yellow's Review Committee PDF BUNDLE
 - Report - Unredacted | Dept ad hoc report - unredacted.pdf Uploaded 06/19/17 by STAFF1 YELLOW
 - Report - Redacted | Dept ad hoc report - redacted.pdf Uploaded 06/19/17 by STAFF1 YELLOW
 - Certification: Departmental Committee Report Access | Signed 06/19/17 by CANDIDATE YELLOW

- VOTING FACULTY REVIEW

2. Depending on the correction requested by the Dean's office, you will select the appropriate action from File Actions drop-down menu. In this example, the Dean's office has asked the department to upload a missing CAPE report, so you would need to select "Return to File Prep" and click "Confirm."

Home | **Review Files** | Committees | AP Data | External Tools

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type | View | [Certs & Notifs](#) | [View File Tracking](#)

Status: File returned to Dept. by Dean's Office

Dean's office has returned the file. Make corrections as discussed then forward the file to the Dean's office.

File Actions... | **Confirm**

File Actions... | **Forward to Dean's Office** | **Return to File Prep**

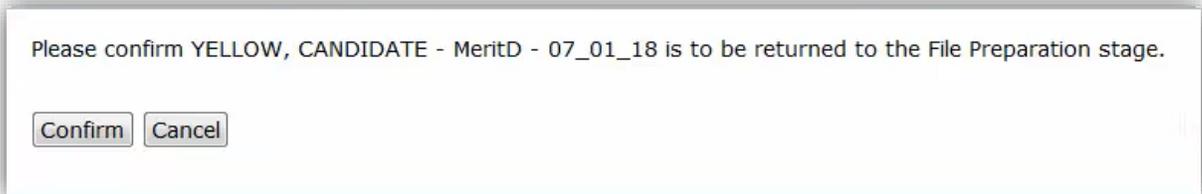
+ FILE PREPARATION

- DEPARTMENTAL REVIEW

- COMMITTEE REVIEW [ASSIGN COMMITTEE](#)

- Yellow's Review Committee (Ad Hoc Confidential) COMPLETE [Re-Notify](#)
 - Yellow's Review Committee Bundle | Yellow's Review Committee PDF BUNDLE

- The following screen will appear. Clicking "Confirm" will return you to the review file detail screen.



- After the necessary correction has been made in File Prep, the Candidate must be notified to re-sign the Certification of Departmental Review, and you should inform the Candidate (in the message box on the notification) of what has been corrected in the file.
- You are not required to re-enter the Proposed Status data and re-upload the departmental recommendation letter before returning the file to the Dean's Office, however, you may do so. Uploading a revised recommendation letter will require that the candidate be notified to re-sign the Certification of Departmental Recommendation Letter Access.
- If Voting Faculty were notified to inspect the original departmental recommendation letter, you must may choose to re-notify them to inspect the letter again, even if there are no changes. The reason (e.g., missing CAPE report added to file) can be provided in the message box in the notification. Although the notification informs Voting Faculty that they can submit dissenting letters, for this example it is assumed that they will not do so.
- After the Candidate has signed this certification, you can now re-submit the file to the Dean.

Below are several additional return to department scenarios and the various required steps.

Scenario 1 – Add/Change/Delete Files in File Prep

- | | |
|---------------|--|
| Step 1 | ▪ Return File to file prep |
| Step 2 | ▪ <i>(optional) Add/replace/delete files</i> |
| Step 3 | ▪ Ask the Candidate to re-certify Certification of Departmental Review |
| Step 4 | ▪ Forward to Dean's Office |

Scenario 2 – Changes to the Vote and/or Proposed

- | | |
|---------------|--|
| Step 1 | ▪ <i>(optional) Change or add a vote and/or</i> ▪ <i>(optional) Changing anything on the Proposed</i> |
| Step 2 | ▪ Forward to Dean's Office |

Scenario 3 – Replacing the Department Letter

- | | |
|---------------|---|
| Step 1 | ▪ Replace the Department Letter |
| Step 2 | ▪ <i>(optional) Ask Chair to e-sign the new letter</i> |
| Step 3 | ▪ <i>(optional) Notify Voting Faculty to review the new letter</i> |
| Step 4 | ▪ <i>(optional) Upload/Delete/Replace dissenting letters</i> |
| Step 5 | ▪ Ask the Candidate to re-certify the Certification of Departmental Recommendation Access |
| Step 6 | ▪ <i>(optional) Upload/Replace the Chair's Independent Letter</i> |
| Step 7 | ▪ Forward to Dean's Office |

Scenario 4 – Replacing/Deleting/Uploading the Chair's Independent Letter

- | | |
|---------------|--|
| Step 1 | ▪ Replace/Delete/Upload the Chair's Independent Letter |
| Step 2 | ▪ Forward to Dean's Office |

Scenario 5 – Engaging (or re-engaging) the Ad Hoc

- | | |
|---------------|--|
| Step 1 | ▪ <i>Notify Ad Hoc to review the file option is not available if ad hoc was engaged in previous step</i> |
| Step 2 | ▪ Replace/Delete/Upload Ad hoc report. System will delete the redacted Ad Hoc report if it exists (with warning) |
| Step 3 | ▪ Ask the Candidate to re-certify Certification of Ad Hoc Report |
| Step 4 | ▪ <i>(optional) Notify Voting Faculty to review the revised file</i> |
| Step 5 | ▪ <i>(optional) If changes to the departmental letter are required, follow workflow in Scenario 3.</i> |
| Step 6 | ▪ Forward to Dean's Office |

Scenario 6 – Engaging the voting faculty (who were not previously engaged)

- | | |
|---------------|--|
| Step 1 | ▪ Notify faculty that review file is ready for review. System will delete the Recommendation Letter if it exists (with warning) ▪ All other steps should follow the "normal" workflow |
|---------------|--|

Scenario 7 – Replacing or Adding Dissenting Letters

- | | |
|---------------|---|
| Step 1 | ▪ <i>(optional) Change or add a vote and/or</i> ▪ <i>(optional) Changing anything on the Proposed (i.e. changing the</i> |
|---------------|---|

| | |
|---------------|---|
| | <i>File Action) and</i> |
| | ▪ Replace/add/delete dissenting letters |
| Step 2 | ▪ Ask the Candidate to re-certify |
| <i>Step 3</i> | ▪ <i>(optional) Upload/Replace the Chair’s Independent Letter (CIL)</i> |
| Step 4 | ▪ Forward to Dean’s Office |

Accepting the file for the Dean’s review

1. If the file is complete and correct, or if it needs only minor annotations, the Dean Staff will highlight “Accept for Dean Review” on the “File Actions” drop-down menu and click “Confirm.”

The screenshot shows a web interface for reviewing a file. At the top, there are navigation tabs: Home, Review Files (selected), Committees, AP Data, and External Tools. Below the tabs, the file name is 'YELLOW, Candidate - MeritOSD - 07_01_18'. There are buttons for 'Select File Type', 'View', 'Certs & Notifs', and 'View File Tracking'. The status is 'Dean Final Authority Review Pending'. A red box highlights the text 'Accept or return to department'. On the right, a dropdown menu is open, showing options: 'Return to Department', 'File Actions...', 'Accept for Dean Review' (highlighted with a red circle), and 'Return to Department'. A 'Confirm' button is also visible and circled in red. Below the status, there is a list of review stages: '+ FILE PREPARATION', '+ DEPARTMENTAL REVIEW', '- DEAN FINAL AUTHORITY REVIEW', '- COMMITTEE REVIEW', '- FINAL ACTION' (with a sub-item 'Final Action Letter'), and '+ POST AUDIT'. At the bottom, there is a footer with UC San Diego contact information and a logo.

2. On the next screen, the Dean Staff will again click “Confirm” to verify that the file is being accepted for the Dean’s review and to return to the review file detail screen.



- 3. The Status line on the review file detail screen will show that the file has been accepted for Final Authority review.

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type View Certs & Notifs View File Tracking

Status: Accepted for Dean Final Authority review

File Actions... Confirm

Assign committees (optional), enter data to proceed with Dean Final Authority review or switch to Campus Review.

| |
|-------------------------------|
| + FILE PREPARATION |
| + DEPARTMENTAL REVIEW |
| - DEAN FINAL AUTHORITY REVIEW |

Data editing

The Edit Data link allows the Dean Staff to correct any errors entered by Department Staff instead of returning the file to the department for corrections. Examples are correcting the number of years at rank and step, the title code, the new step and salary, etc.

Note: Only data initially entered into “Proposed” by the Department Staff or Chair roles can be changed. If any documents need to be revised and replaced, the file must be returned to the department.

- 1. To correct data, the Dean Staff will click “Edit Data” on the review file detail screen.
- ▶ Data editing must be done before the Dean Staff clicks “Annotation,” “Disagree,” or “As Proposed,” or the ability to make data changes will be lost.

Home **Review Files** Committees AP Data External Tools

YELLOW, Candidate - MeritOSD - 07_01_18

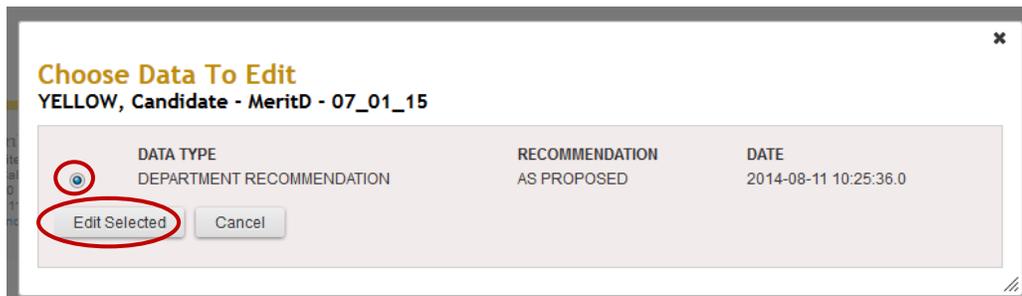
Select File Type View [Certs & Notifs](#) [View File Tracking](#)

Status: Accepted for Dean Final Authority review File Actions... Confirm

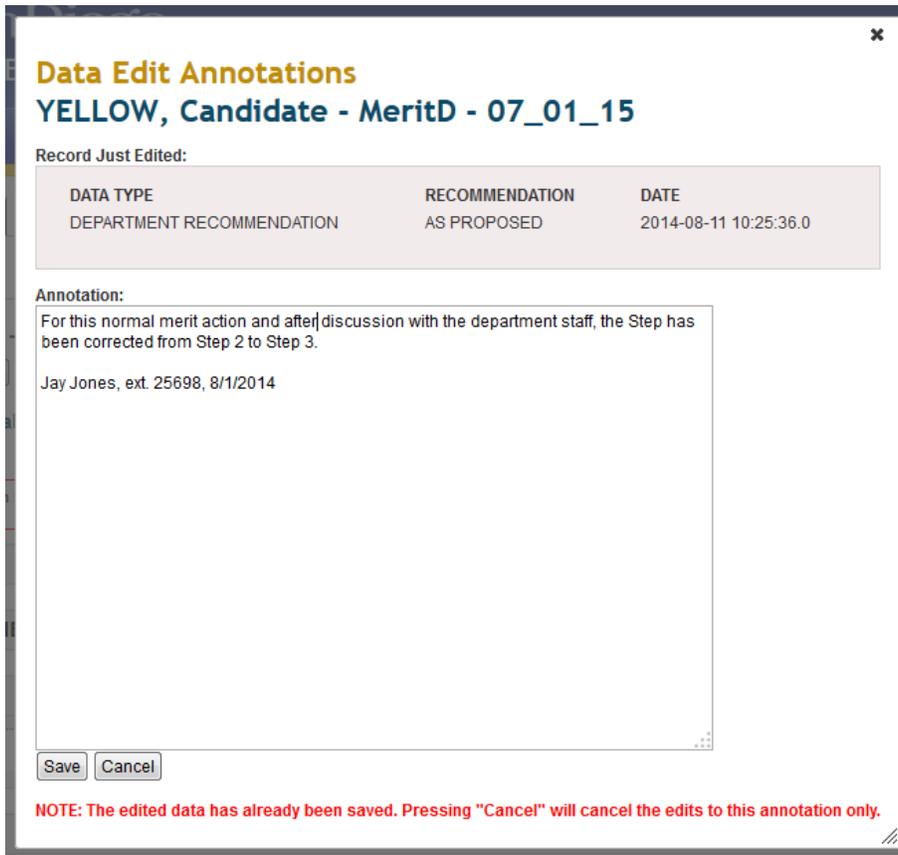
Assign committees (optional), enter data to proceed with Dean Final Authority review or switch to Campus Review.

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW
 - COMMITTEE REVIEW [ASSIGN COMMITTEE](#)
 - FINAL ACTION
 - Final Action Letter [Edit Data](#) [Annotation](#) [Disagree](#) [As Proposed](#)

- When the Dean Staff clicks “Edit Data,” a pop-up window will appear with a choice of data types to edit. (In this case, only the Department Recommendation data is available to edit.) The Dean Staff will click the button next to a data type to select it, and then click “Edit Selected.”



- The “Proposed” data screen will appear, and the Dean Staff can correct the data as needed.
- After the Dean Staff corrects the data and clicks “Save Status,” a new pop-up window, “Data Edit Annotations,” will appear. Here the Dean Staff can enter an annotation about what has been corrected, explaining the reason and showing who made the correction. The annotation should include the Dean Staff name, telephone extension, and the date of the correction. When the annotation is complete, the Dean Staff will click “Save” to return to the review file detail screen.



Data Edit Annotations
YELLOW, Candidate - MeritD - 07_01_15

Record Just Edited:

| DATA TYPE | RECOMMENDATION | DATE |
|---------------------------|----------------|-----------------------|
| DEPARTMENT RECOMMENDATION | AS PROPOSED | 2014-08-11 10:25:36.0 |

Annotation:

For this normal merit action and after discussion with the department staff, the Step has been corrected from Step 2 to Step 3.
Jay Jones, ext. 25698, 8/1/2014

Save Cancel

NOTE: The edited data has already been saved. Pressing "Cancel" will cancel the edits to this annotation only.

Annotating the file

1. If annotations are needed, the Dean Staff will click "Annotation" on the review file detail screen.
 - ▶ **Annotations must be done *before* the Dean Staff clicks "Disagree" or "As Proposed," or the ability to make annotations will be lost.**

Home | **Review Files** | Committees | AP Data | External Tools

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type | View | [Certs & Notifs](#) | [View File Tracking](#)

Status: Accepted for Dean Final Authority review File Actions... | Confirm

Assign committees (optional), enter data to proceed with Dean Final Authority review or switch to Campus Review.

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW
 - COMMITTEE REVIEW [ASSIGN COMMITTEE](#)
 - FINAL ACTION
 - Final Action Letter [Edit Data](#) | [Annotation](#) | [Disagree](#) | [As Proposed](#)

- a. The Dean Staff will then see the following screen and will click "Add Annotation." Note that the annotation for the data edit already entered on the File Summary is listed under Content Type.

Annotations

YELLOW, Candidate - MeritD - 07_01_15

| Content Type | Page No. | |
|------------------------------|----------|--|
| File Summary | 1 | |

Add Annotation | Save | Cancel

NOTE: Your annotation is not saved until you click the "Save" button

- 2. To make an annotation, the Dean Staff will first select the document to be annotated (the Sabbatical Report, in this example) from a drop-down menu of file documents.

Annotations

YELLOW, Candidate - MeritD - 07_01_15

| Content Type | Page No. |
|------------------------------|----------|
| File Summary | 1 |

Attention:

- The Page field refers to where the page to be annotated exists in the bundled PDF. Obtain this page number from the bundle using the "View File" link on the file detail page prior to entering the annotation(s).
- Only one annotation entry allowed per page number of the bundle; adding an annotation using the same page number as an existing annotation will delete the existing annotation text. To edit an existing annotation, click on the Edit button of the Content Type annotation to be edited.
- Annotations will appear as the last item on the Table of Contents of the file.

Type: -- Please Select --

Page: Biography/Bibliography
Candidate Personal Statement

Annotation: Chair's Independent Letter
Course Load and Student Direction Form
Departmental Ad Hoc Report - Redacted
Departmental Ad Hoc Report - Unredacted
Departmental recommendation letter
Dissenting Letters from Voting Faculty
Employment History
Evidence of Teaching Effectiveness:CAPE Reports (summaries, stat sheets)
Evidence of Teaching Effectiveness:Departmental Teaching Evaluations
Evidence of Teaching Effectiveness:Other Evidence of Teaching Effectiveness
Response to Certification: Departmental Ad Hoc Access
Response to Certification: Departmental Recommendation Access
Response to Certification: Departmental Review
Sabbatical Report

Add to List Cancel

NOTE: Your annotation is not saved until you "Add to List" and click the "Save" button on the next screen

3. The document selected will appear in the "Type" field, and the Dean Staff will enter the page number on which the error was found. The Dean Staff should briefly describe the error and provide the correct information, and then click "Add to List."

Annotations

YELLOW, Candidate - MeritD - 07_01_15

| Content Type | Page No. |
|------------------------------|----------|
| File Summary | 1 |

Attention:

- The Page field refers to where the page to be annotated exists in the bundled PDF. Obtain this page number from the bundle using the "View File" link on the file detail page prior to entering the annotation(s).
- Only one annotation entry allowed per page number of the bundle; adding an annotation using the same page number as an existing annotation will delete the existing annotation text. To edit an existing annotation, click on the Edit button of the Content Type annotation to be edited.
- Annotations will appear as the last item on the Table of Contents of the file.

Type:

Page:

Annotation:

Sabbatical was taken in academic year 2012-13, not in 2013-14.

NOTE: Your annotation is not saved until you "Add to List" and click the "Save" button on the next screen

4. The document names and the page numbers of annotated items will appear under the "Content Type" and "Page No." headings at the top of the annotation screen.

(Note that the page number should be the one in the actual document. It does not refer to the placement of the page within the bundled PDF. For example, the bundled PDF might be 120 pages long, and the sabbatical report might be on pages 89–91 of the bundle, but if an error is found on page 2 of the sabbatical report, the page number listed in the annotation should be page 2.)

To add further annotations, the Dean Staff will click “Add More” and repeat the process.

Annotations

YELLOW, Candidate - MeritD - 07_01_15

| Content Type | Page No. | |
|------------------------------------|----------|------|
| Employment History | 1 | Edit |
| File Summary | 1 | |
| Sabbatical Report | 2 | Edit |

[Add More](#) [Save](#) [Cancel](#)

NOTE: Your annotation is not saved until you click the "Save" button

- To edit annotations before or after saving them, the Dean Staff will click the “Edit” button for the appropriate annotation. The document type and page number cannot be changed.
- **Note:** you cannot edit File Summary comments, as they are the result of data corrections, not document corrections.

Annotations

YELLOW, Candidate - MeritD - 07_01_15

| Content Type | Page No. | |
|------------------------------------|----------|-------------------------------------|
| File Summary | 1 | |
| Employment History | 1 | <input type="button" value="Edit"/> |
| Sabbatical Report | 2 | <input type="button" value="Edit"/> |

Attention:

- The Page field refers to where the page to be annotated exists in the bundled PDF. Obtain this page number from the bundle using the "View File" link on the file detail page prior to entering the annotation(s).
- Only one annotation entry allowed per page number of the bundle; adding an annotation using the same page number as an existing annotation will delete the existing annotation text. To edit an existing annotation, click on the Edit button of the Content Type annotation to be edited.
- Annotations will appear as the last item on the Table of Contents of the file.

Type:

Page:

Annotation:

Sabbatical was taken in academic year 2012-13, not 2013-14.

NOTE: Your annotation is not saved until you "Add to List" and click the "Save" button on the next screen

6. When all annotations have been made, the Dean Staff will click "Save" to save the annotations and automatically return to the review file detail screen.

Annotations

YELLOW, Candidate - MeritD - 07_01_15

| Content Type | Page No. | |
|------------------------------------|----------|-------------------------------------|
| Employment History | 1 | <input type="button" value="Edit"/> |
| File Summary | 1 | |
| Sabbatical Report | 2 | <input type="button" value="Edit"/> |

NOTE: Your annotation is not saved until you click the "Save" button

7. To add further annotations, the Dean Staff can again click “Annotation” on the review file detail screen.

- COMMITTEE REVIEW [ASSIGN COMMITTEE](#)

- FINAL ACTION

- Final Action Letter [Edit Data](#) [Disagree](#) [As Proposed](#)

8. A modified version of the Annotations screen will appear, with a different button (“Add Annotations”) at the bottom (compare to button in step 4 above). The Dean Staff will click “Add Annotation” to add a new annotation, following the steps above.

Annotations

YELLOW, Candidate - MeritD - 07_01_15

| Content Type | Page No. | |
|------------------------------------|----------|-------------------------------------|
| File Summary | 1 | |
| Employment History | 1 | <input type="button" value="Edit"/> |
| Sabbatical Report | 2 | <input type="button" value="Edit"/> |

NOTE: Your annotation is not saved until you click the "Save" button

9. The Dean Staff will then click “Save” to exit the Annotations screen and return to the review file detail screen.

Annotations

YELLOW, Candidate - MeritD - 07_01_15

| Content Type | Page No. | |
|------------------------------------|----------|-------------------------------------|
| File Summary | 1 | |
| Employment History | 1 | <input type="button" value="Edit"/> |
| Sabbatical Report | 2 | <input type="button" value="Edit"/> |

NOTE: Your annotation is not saved until you click the "Save" button

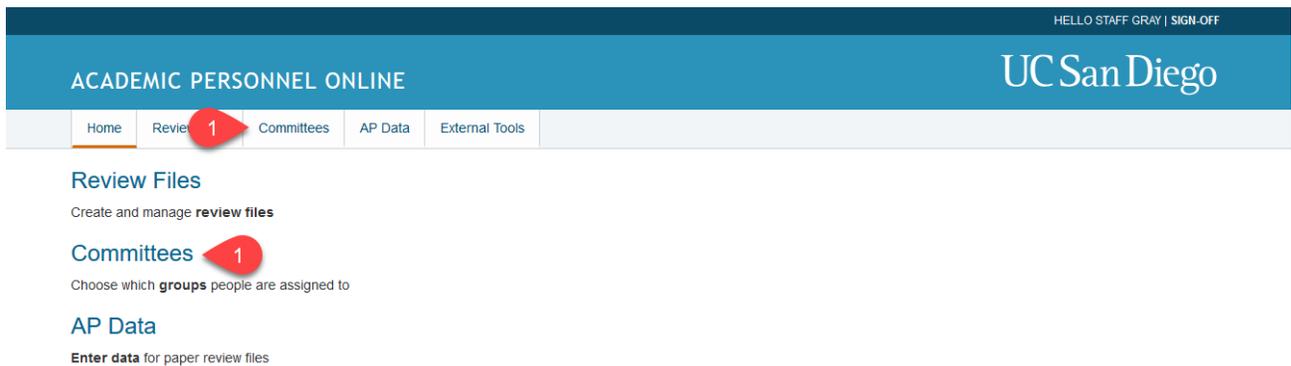
► Annotations will appear at the bottom of the table of contents in the Department view of the bundled file (not shown here).

Divisional Committee Review

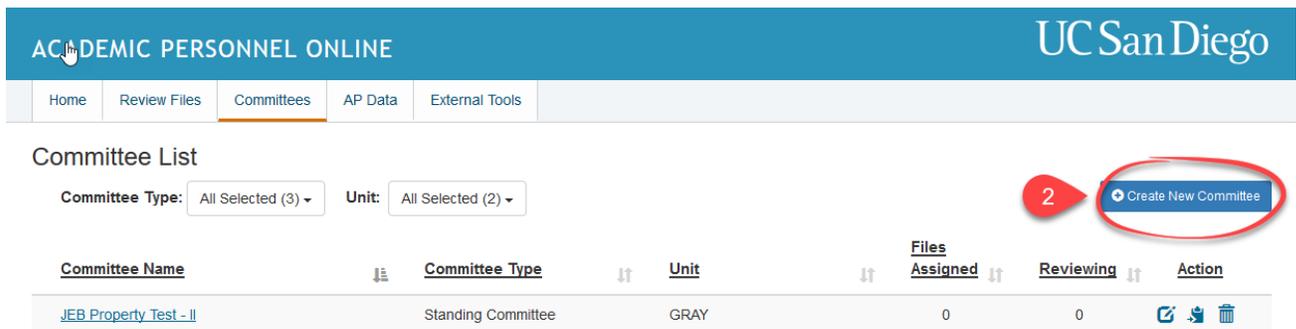
When a file is first accepted for Dean's review, the dean must first determine if a divisional review committee should review the file prior to determining the dean's recommendation. Before assigning a committee to a file, you must create a committee.

Creating Committees

1. Enter the committee list screen by selecting the "Committees" tab or by clicking on the "Committees" hyperlink on the homepage.



2. Click the "Create New Committee" button.



3. Enter the committee's name.
4. Select the appropriate committee type:
 - a. **Ad Hoc:** a case specific committee that may only be assigned to one review file.
 - b. **Standing:** a permanent committee with a fixed annual membership that may be assigned to multiple review files. Temporary membership changes, such as recusing a member, may be done on a case-by-case basis without affecting the committee's fixed membership.
5. If you are assigned to a dean staff role for multiple divisions/units, select the division for which you are creating the committee.
6. Select Confidentiality type:
 - a. **Non-confidential:** the candidate knows the committee membership and therefore, the committee report is not redacted and is automatically provided to the candidate. The majority of standing committees are non-confidential committees.
 - b. **Confidential:** membership is unknown to the candidate and the committee report will be redacted when the candidate requests a copy. The majority of ad hoc committees are confidential committees.
7. Select a recommendation data requirement:
 - a. Yes: Allows you to enter committee recommendation data, similar to entering dean recommendation data, which will display on file summary page 2 in the pdf file bundle.

- b. No: Data entry will not be enabled for this committee.
- 8. Click the “add member(s)” button.

ACADEMIC PERSONNEL ONLINE UC San Diego

Home Review Files **Committees** AP Data External Tools

Committee List > Create New Committee

Create New Committee

Properties

Name:
 3
Committee name is visible to candidate. Please keep confidentiality in mind.

Type:
 Standing Committee 4
 Ad Hoc Committee

Unit: BLUE 5

Confidentiality: Non-Confidential 6

Recommendation Data:
 Yes 7
 No

Members

| <input type="checkbox"/> | Name | Title/Series | Department | Membership |
|----------------------------|------|--------------|------------|------------|
| No data available in table | | | | |

8 **Add Member(s)**
Delete Members

Save Cancel

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- 9. Search for members by name, title/series, or unit (or any combination of fields). You have the option to add academics from outside of your division/unit to each committee, so you may find it helpful to limit the search to the academics within your division/unit if it not your divisional practice to involve outside committee members.
- 10. Select desired individuals by clicking the checkbox next to their name and click the “Add” button.

- 11. **Optional**-designate a “Chair” member in the membership value column.
- 12. Click the “Save” button.

Assigning Committees

1. Enter the review file list by selecting the “Review Files” tab or by clicking the “Review Files” hyperlink on the homepage.
2. Click the Candidate’s name to open the review file details screen.
3. Accept the file for Dean Review by selecting “Accept for Dean Review” in the file action drop down menu and click the “Confirm” button. Click “Confirm” on the pop-up window.
4. Scroll down to the “Dean Review-Committee Review” section of the screen and click “Assign Committee”.

Home | **Review Files** | Committees | AP Data | External Tools

GRAY, CANDIDATE - AccelMerit - 07_01_18

Select File Type | View | [Certs & Notifs](#) | [View File Tracking](#)

Status: Accepted for Dean review File Actions... | Confirm

❗ File ready for review.

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN REVIEW
 - COMMITTEE REVIEW 4 ASSIGN COMMITTEE
 - DEAN RECOMMENDATION
 - Dean Recommendation Letter [Edit Data](#) [Annotation](#) [As Proposed](#) [Disagree](#)

- Select the committee that you wish to assign to the file from the pop-up window. Selecting a committee will expand the committee's membership and provide you the option to recuse members of the committee from reviewing the file. To recuse a member, uncheck the box next to their name and their name will be stricken through. If you wish to add members to the committee, you must do so within the committee details screen.

Assign a Committee to:

GRAY, CANDIDATE - AccelMerit - 07_01_18

| Committee Name | Files Assigned | Reviewing |
|---|----------------|-----------|
| Ad Hoc Committee(s) | | |
| <input type="radio"/> JEB Ad Hoc NC Rec 1 (Confidential) | 0 | 0 |
| Standing Committee(s) | | |
| <input checked="" type="radio"/> JEB Final Property Test (Non-Confidential) To recuse an individual from reviewing this file, deselect (un-check) their name from the list below. <div style="margin-left: 20px;"> <input checked="" type="checkbox"/> GREEN, Academic 1 (PROF-AY, GREEN) <input type="checkbox"/> GREEN, Academic 3 (PROF-AY, GREEN) <input checked="" type="checkbox"/> GREEN, Academic 4 (ASSOC PROF-AY, GREEN) </div> | 0 | 0 |
| <input type="radio"/> JEB Property Test X (Confidential) | 0 | 0 |
| <input type="radio"/> JEB Standing Conf NR (Confidential) | 0 | 0 |
| <input type="radio"/> JEB Standing Conf Rec (Confidential) | 0 | 0 |

Cancel Save Save & Notify

- If you are **not ready** to notify the committee to review the file, click the "Save" button to assign the committee to the file. When you are ready to notify the committee that the file is ready for review, click the "Notify" hyperlink located next in the committee's section on the file details page.

i Committee Review must be completed before the Dean Recommendation Letter can be uploaded

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN REVIEW
- COMMITTEE REVIEW [ASSIGN COMMITTEE](#)

- Brandy Name Change Test Committeee (Standing Non-Confidential) **PENDING NOTIFICATION** [Notify](#) [Unassign](#)
- Brandy Name Change Test Committeee Bundle | [Brandy Name Change Test Committeee PDF BUNDLE](#)
- Report - Unredacted

7. If you are ready to notify the committee to review the file, click the “Save & Notify” button. The committee notification pop up screen will display all committee members that will be notified.

Email Notification to Committee Members

GRAY, CANDIDATE - AccelMerit - 07_01_18

The following committee members are assigned to review the file.

- **Brandy Name Change Test Committeee (Standing)**
 - ✓ Academic 1 GREEN
 - ✓ Academic 3 GREEN
 - ✓ Academic 4 GREEN

To:
Academic 1 GREEN <GreenAca1@ucsd.edu>; Academic 3 GREEN <GreenAca3@ucsd.edu>; Academic 4 GREEN <GreenAca4@ucsd.edu>

CC:

Subject:

Message:
File Ready for Committee Review: (GRAY, CANDIDATE - AccelMerit - 07_01_18)

Please type your message here:

You have been identified as a member of a divisional review committee for the above academic review file. If you feel that you have been contacted in error, please contact your Dean’s Office.

The academic review file for this candidate is now ready for review by the divisional review committee. To view this academic review file, log on to AP On-Line (<https://www-act.ucsd.edu/apol/apol>) and click on the link for the file.

Committee members are reminded that University of California policy requires that personnel decisions be based solely upon the materials contained in the academic review file. Access to this information is provided to you as a departmental committee member solely for the purpose of providing a recommendation on this personnel action. Breach of the established rules governing confidentiality in personnel procedures is a violation of the Faculty Code of Conduct.

If you have any questions about the review process, please contact your Dean’s Office.

Thank you for your service on this committee.



8. Click the “Send” button.

The committee status will now show up as “In Review” on the file details page. There will also be links to end the committee’s access to the file, re-notify the committee, unassign the committee, enter recommendation data (if selected as “Yes” when creating the committee” and to upload unredacted and redacted (if a confidential committee) reports.

ACADEMIC PERSONNEL ONLINE UC San Diego

Home **Review Files** Committees AP Data External Tools

GRAY, CANDIDATE - AccelMerit - 07_01_18

Select File Type View [Certs & Notifs](#) | [View File Tracking](#)

Status: Dean Committee Review File Actions... Confirm

Committee Review must be completed before the Dean Recommendation Letter can be uploaded

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN REVIEW
 - COMMITTEE REVIEW [ASSIGN COMMITTEE](#)
 - Brandy Name Change Test Committeee (Standing Non-Confidential) **IN REVIEW** [End Access](#) [Re-Notify](#) [Unassign](#)
 - Brandy Name Change Test Committeee Bundle | [Brandy Name Change Test Committeee PDF BUNDLE](#)
 - Report - Unredacted **Recommendation Data Entry** [As Proposed](#) [Disagree](#)
 - DEAN RECOMMENDATION
 - Dean Recommendation Letter | [As Proposed](#) [Disagree](#)
Committee Review must be completed before the Dean Recommendation Letter can be uploaded

Dean’s review for decision as final authority

When a normal merit file is accepted for the Dean’s review, the Dean must determine whether he or she agrees or disagrees with the proposed action. If the Dean agrees, a final action letter will be issued (see details below). If the Dean disagrees, the file becomes a contested merit and must be submitted for Campus review and a decision by the EVC. (See page E-1.)

1. In this scenario, the Dean agrees with the proposed action, so the Dean Staff will click “As Proposed” on the review file detail screen.

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type View Certs & Notifs View File Tracking

Status: Accepted for Dean Final Authority review

File Actions... Confirm

Assign committees (optional), enter data to proceed with Dean Final Authority review or switch to Campus Review.

+ FILE PREPARATION

+ DEPARTMENTAL REVIEW

- DEAN FINAL AUTHORITY REVIEW

- COMMITTEE REVIEW ASSIGN COMMITTEE

- FINAL ACTION

Final Action Letter [Edit Data](#) [Annotation](#) [Disagree](#) [As Proposed](#)

+ POST AUDIT

- The Proposed Status screen will appear. The Dean Staff should check the information for accuracy and then click "As Proposed" at the bottom of the screen to verify that the data is correct and the Dean approves the proposed action.

Proposed Status

YELLOW, Candidate - MeritD - 07_01_15

| | |
|---------------------|--|
| Department: | YELLOW |
| Title, Rank & Step: | 1200 - ASSOCIATE PROFESSOR-ACAD YR , Step 3 |
| Total Salary: | \$79,200.00 |
| Scale Rate: | \$79,200.00 (07/01/2014 SCALE) From Scale: <input checked="" type="checkbox"/> |
| Basis: | Not Available % OF TIME: 100% |
| Effective Dates: | 07/01/2015 - 01/01/2079 |

- 4. The Dean Staff will then be directed to upload the Dean’s final action letter. **This letter is created and converted to a PDF file outside Review.** There will be an Upload button on the screen, and the upload process will be the same as for all other file documents.

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type View Certs & Notifs View File Tracking

Status: Accepted for Dean Final Authority review File Actions... Confirm

Assign committees (optional), enter data to proceed with Dean Final Authority review or switch to Campus Review.

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW
 - COMMITTEE REVIEW ASSIGN COMMITTEE
 - FINAL ACTION
 - Final Action Letter Upload Edit Data Annotation Disagree As Proposed*

- 5. Note that if the Dean uploads the final action letter, the letter will be signed automatically. If the Dean Staff uploads the letter, unsigned, the Dean Staff has the option to notify the Dean to sign the letter via the “Notify” link on the file details page.

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type View Certs & Notifs View File Tracking

Status: Accepted for Dean Final Authority review File Actions... Confirm

Notify Dept of Final Action or notify Dean to sign letter.

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW
 - COMMITTEE REVIEW
 - FINAL ACTION
 - Final Action Letter | Dean's final action letter.pdf Uploaded by DEANSTAFF1 BLUE on 06/19/17. Notify Dean to Sign Edit Data Annotation Disagree As Proposed* Replace Delete

- 6. There will now be a message box on the Dean Staff review file detail screen indicating that the Dean has been notified to sign the final action letter.

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type View Certs & Notifs View File Tracking

Status: Accepted for Dean Final Authority review

File Actions... Confirm

Dean has been notified to sign the final action letter



- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW

7. The Dean's review file detail screen will show that the letter is waiting for the Dean's signature. Note that either the Dean or Dean Staff can revise, replace, or delete the final action letter, if needed, but *only the Dean can sign the letter*. The Dean will click "Sign" to do so.

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type View Certs & Notifs View File Tracking

Status: Accepted for Dean Final Authority review

File Actions... Confirm

Final Action Letter is waiting your signature

- + FILE PREPARATION
 - + DEPARTMENTAL REVIEW
 - DEAN FINAL AUTHORITY REVIEW
 - COMMITTEE REVIEW
 - FINAL ACTION
- Final Action Letter | [Dean's final action letter.pdf](#) Uploaded by DEANSTAFF1 BLUE on 06/19/17. **Sign** Edit Data Annotation Disagree As Proposed* Replace Delete
- Final Action Letter is waiting your signature

8. The following screen will appear, and the Dean will click "Confirm."

I am signing Final Action Letter for Review File YELLOW, Candidate - MeritOSD - 07_01_18

Confirm Cancel

9. The review file detail screen will then show that the final action letter has been signed.

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type View Certs & Notifs View File Tracking

Status: Accepted for Dean Final Authority review

File Actions... Confirm

Notify Dept of Final Action

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW
 - COMMITTEE REVIEW
 - FINAL ACTION
 - Final Action Letter | [Dean's final action letter.pdf](#) *Electronically signed by Division Dean BLUE on 06/19/17.* [Edit Data](#) [Annotation](#) [Disagree](#) [As Proposed*](#) [Replace](#) [Delete](#)

10. After the Dean has signed the final action letter, the Dean Staff will notify the department of the Dean Final Action via the File Actions drop-down menu.



YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type View Certs & Notifs View File Tracking

Status: Accepted for Dean Final Authority review

Notify Dept of Final Action

File Actions... Confirm

- File Actions...
- Notify Dept of Dean Final Action
- Return to Department

- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW
 - COMMITTEE REVIEW
 - FINAL ACTION
 - Final Action Letter | [Dean's final action letter.pdf](#) *Electronically signed by Division Dean BLUE on 06/19/17.* [Edit Data](#) [Annotation](#) [Disagree](#) [As Proposed*](#) [Replace](#) [Delete](#)
- + POST AUDIT

12. The Dean or Dean Staff (and any other role with access to the review file) can click “View File Tracking” on the review file detail screen above to see a list of all actions taken on this Candidate's file to date, as shown below.

File Tracking

| Date | Action |
|-------------------|---|
| 08/12/14 11:25:04 | Final Action |
| 08/12/14 10:49:11 | Final Authority Review with annotations |
| 08/11/14 10:43:32 | Accepted for Final Authority review |
| 08/11/14 10:27:34 | Final Authority Review Pending |
| 08/11/14 10:27:08 | Departmental Review |
| 08/11/14 10:27:06 | Dept Recommend Cert signed |
| 08/11/14 10:26:23 | Dept Recommend Cert pending |
| 08/11/14 10:24:32 | File returned to Dept. by Dean's Office |
| 08/11/14 08:28:16 | Final Authority Review Pending |
| 08/11/14 08:21:47 | Departmental Review |
| 08/11/14 08:16:19 | Dept Recommend Cert signed |
| 08/08/14 11:47:52 | Dept Recommend Cert pending |
| 08/08/14 11:32:33 | Departmental Review |
| 08/04/14 10:34:58 | Dept Ad Hoc Cert signed |
| 08/02/14 16:09:24 | Dept Ad Hoc Cert pending |
| 08/02/14 15:29:00 | Department Ad hoc Review |
| 08/02/14 14:17:33 | Departmental Review |
| 08/02/14 14:17:32 | Dept Rev Cert signed |
| 08/02/14 14:06:26 | Dept Rev Cert pending |
| 08/02/14 14:05:12 | File Prep |
| 08/02/14 13:36:12 | Dept Rev Cert pending |
| 08/02/14 13:04:06 | File Prep |
| 08/02/14 12:36:25 | File Created |

13. Any role *except* Candidate and Candidate Alternate can also click on “Certs & Notifs” on the review file detail screen to see listings of the certifications and notifications for the Candidate’s file.

Certs & Notifs Tracking

YELLOW, Candidate - MeritD - 07_01_15

| Cert | Date |
|---|-------------------|
| + Certification of Departmental Recommendation Access | 08/11/14 10:27:08 |
| + Certification of Departmental Recommendation Access | 08/11/14 08:16:20 |
| + Certification of Departmental Ad Hoc Report Access | 08/04/14 10:34:59 |
| + Certification of Departmental Review | 08/02/14 14:17:33 |

| Notification | Date |
|---|-------------------|
| + Notify Department Final Action Letter Available | 08/12/14 11:25:07 |
| + Notify Dean Final Action Letter Uploaded and Need to Sign | 08/12/14 10:58:33 |
| + Notify Candidate Departmental Recommendation Letter Available | 08/11/14 10:26:26 |
| + Notify Voting Faculty Access to Departmental recommendation letter | 08/11/14 10:26:00 |
| + Notify Chair Departmental Recommendation Letter Uploaded and Need to Sign | 08/11/14 10:24:19 |
| + Notify Voting Faculty Access to Departmental recommendation letter | 08/11/14 10:23:30 |
| + Notify Candidate Departmental Recommendation Letter Available | 08/08/14 11:47:56 |

14. The following notification will be sent by the Dean’s office to the Department Chair, with a cc: to Department Staff.

- -

- Subject: Final action letter completed (YELLOW, Candidate - MeritD - 07_01_15)
- Text: The letter regarding the dean’s final action on the academic review file noted above is now available. To view the letter, log on to AP On-Line (<https://www-act.ucsd.edu/apol>) and click on the link for this review file.

After the department chair has informed the candidate of the result of this review, the candidate must be provided access to the final action letter. You may do so via the File Action drop-down menu.

Please notify candidate of final action letter.

15. A message will appear on the review file detail screen directing the Department Staff to notify the Candidate that the final action letter is available.

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type ▾ View [Certs & Notifs](#) | [View File Tracking](#)

Status: Dean Final Action File Actions... ▾ Confirm

Final Action is complete - notify candidate

| |
|-------------------------------|
| + FILE PREPARATION |
| + DEPARTMENTAL REVIEW |
| - DEAN FINAL AUTHORITY REVIEW |
| - COMMITTEE REVIEW |

▶ 16. Outside *Review*, the department should inform the Candidate of the final results of the review in whatever way it prefers (e.g., the department may invite the Candidate to meet with the Department Chair to discuss the final decision). This should be done *before* providing the Candidate access to the final action letter.

17. After the final action has been communicated to the Candidate outside *Review*, you must provide the Candidate access to the final action letter before the file can be completed and moved to the Post Audit stage. On the “File Actions” menu, select “Notify Candidate: Final Action Letter” and click “Confirm.”

YELLOW, Candidate - MeritOSD - 07_01_18

Select File Type View [Certs & Notifs](#) | [View File Tracking](#)

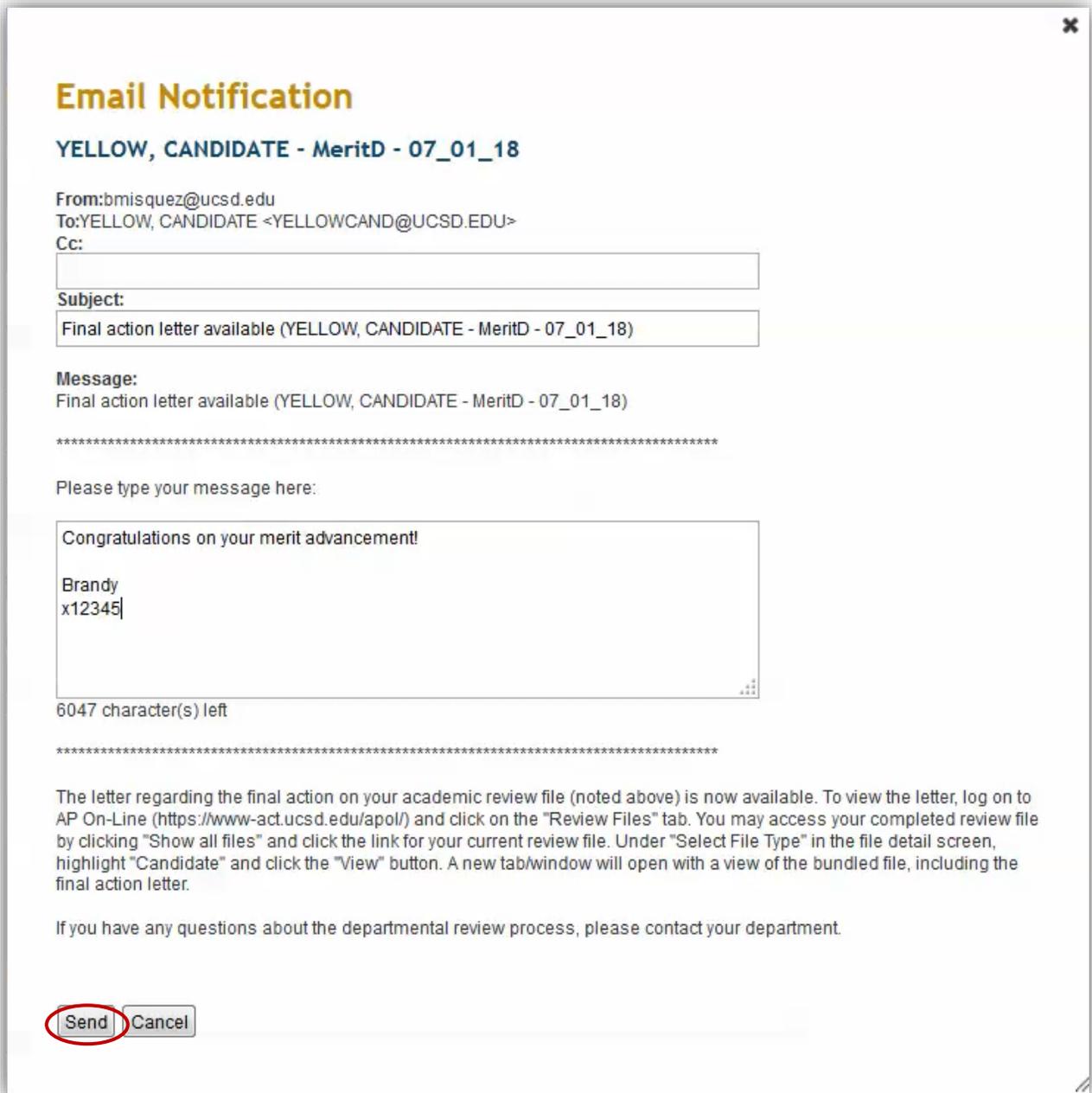
Status: Dean Final Action

File Actions... Confirm
File Actions...
Notify Candidate of Final Action Letter
Return to Dean

Final Action is complete - notify candidate

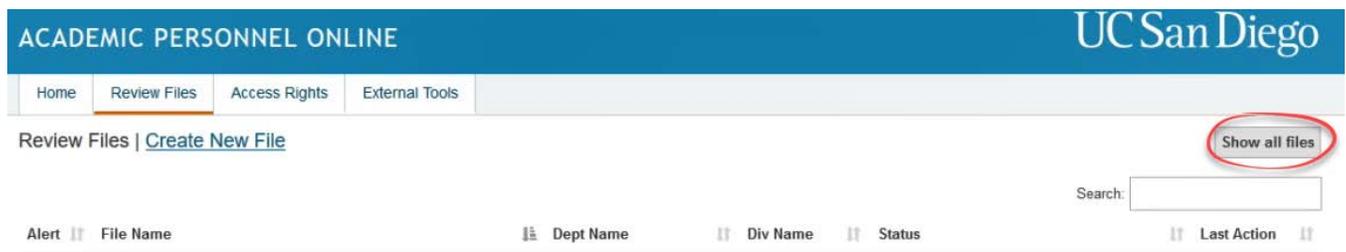
- + FILE PREPARATION
- + DEPARTMENTAL REVIEW
- DEAN FINAL AUTHORITY REVIEW
- COMMITTEE REVIEW
- FINAL ACTION
 - Final Action Letter | *Dean's final action letter.pdf Electronically signed by Division Dean BLUE on 06/19/17.*

18. You will see the following notification to the Candidate. You can add further information in the message box at the bottom of the screen and then click "Send."



19. The Candidate can click the Review Files tab to open the Review Files screen.

20. Since the Candidate’s file will be in “Post Audit and Store” at this point and won’t be visible on the Review Files screen, the Candidate must click on “Show all files” to display a list of his or her completed review files.



21. The Candidate can now click on his or her file to view the review file detail screen.

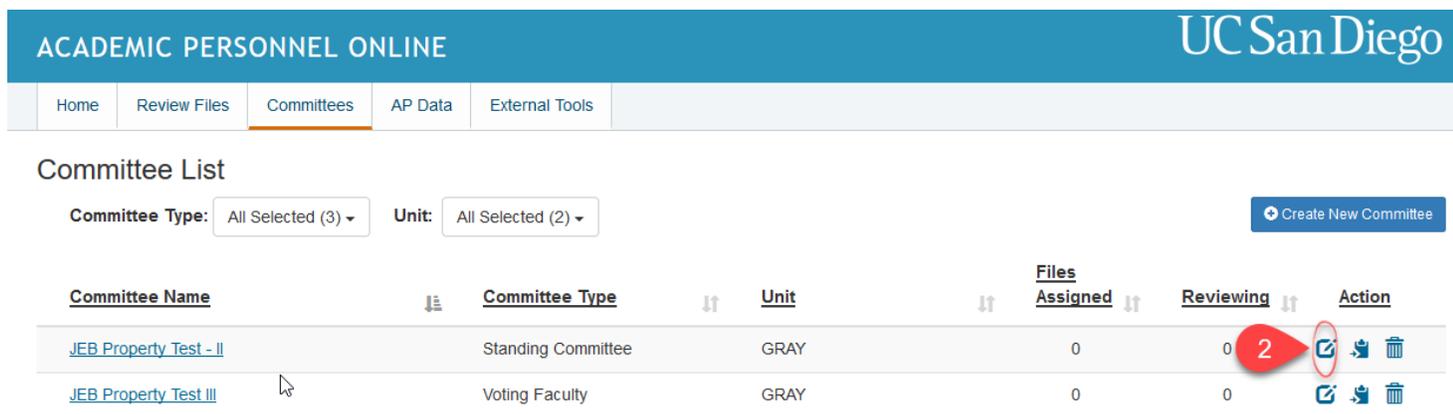
22. On the review file detail screen, the Candidate should select “Candidate” on the File Type drop-down menu and click the View button to access the Candidate’s view of the bundled file. The Candidate can then select the Final Action Letter in the Bookmarks or Table of Contents.

Addendum: Managing Divisional Review Committees

Below you will find more information on managing committees.

Editing Committees

1. Enter the committee list screen by selecting the “Committees” tab or by clicking the “Committees” hyperlink on the homepage.
2. Click the “Edit” icon located on the committee’s row on the committee list screen.



You may also click on the committee’s name to bring up the committee details page and click the “edit” button.

Prof. Gray's Review Committee : Details




Properties | Members | Files

Committee Type: Ad Hoc
Unit: GRAY
Confidentiality: Confidential

System Properties:

3. Update any previously selected properties (i.e. committee name, type, confidentiality, and unit).
4. Delete members by clicking the trash icon next to their name, if necessary.
5. Add new members by clicking the "Add member(s)" button. Search for members by name, title/series, or unit (or any combination of fields), select desired members, and click the "Add" button.
6. **Optional**-Update committee member's membership value.
7. After making the appropriate edits, click the "Save" button.

Edit Gray Department Review Committee

Properties

Name:

Committee name is visible to candidate. Please keep confidentiality in mind.

System Info:
 Date Created: 06/13/2017 Date Last Changed: 06/13/2017
 Created By: GRAY, STAFF Last Changed By: GRAY, STAFF

Type:
 Voting Faculty
 Standing Committee
 Ad Hoc Committee

Unit:

Confidentiality:

Members

| <input type="checkbox"/> | Name | Title/Series | Department | Membership | <input type="checkbox"/> |
|--------------------------|------------------|----------------|------------|------------|---|
| <input type="checkbox"/> | GRAY, Academic 3 | PROF-AY | GRAY | Chair |  |
| <input type="checkbox"/> | GRAY, CHAIR | PROF-AY | GRAY | Member |  |
| <input type="checkbox"/> | RED, Academic 2 | SR LECT SOE-AY | RED | Member |  |

Changes to the committee will appear in the committee properties change log.

Gray Department Review Committee : Details

Edit Copy Delete

Properties Members Files

Committee Type: Standing
Unit: GRAY
Confidentiality: Non-Confidential

System Properties:
Date Created: 06/13/2017 Date Last Changed: 06/13/2017
Created By: GRAY, STAFF Last Changed By: GRAY, STAFF

Committee Properties Change Log:

| Date | User | Property | Old Value | New Value |
|------------------|-------------|----------|-------------------------------|----------------------------------|
| 06/13/2017 09:13 | GRAY, STAFF | Name | Prof. Gray's Review Committee | Gray Department Review Committee |

Deleting Committees

Reminder: committees may only be deleted after all assigned review files have reached Post Audit & Store.

1. Enter the committee list screen by selecting the “Committees” tab or by clicking the “Committees” hyperlink on the homepage.
2. Click the “Delete” icon located on the committee’s row on the committee list screen.

ACADEMIC PERSONNEL ONLINE UC San Diego

Home Review Files **Committees** AP Data External Tools

Committee List

Committee Type: All Selected (3) Unit: All Selected (2) Create New Committee

| Committee Name | Committee Type | Unit | Files Assigned | Reviewing | Action |
|-------------------------------|--------------------|------|----------------|-----------|--|
| <a>JEB Property Test - II | Standing Committee | GRAY | 0 | 0 | <a>2 <a>Edit <a>Copy <a>Delete |
| <a>JEB Property Test III | Voting Faculty | GRAY | 0 | 0 | <a>Edit <a>Copy <a>Delete |

You may also click on the committee’s name to bring up the committee details page and click the “Delete” button.

ACADEMIC PERSONNEL ONLINE UC San Diego

Home Review Files **Committees** AP Data External Tools

Committee List > Committee Details > Committee Properties

Prof. Gray's Review Committee : Details

2 Edit Copy Delete

Properties Members Files

Committee Type: Ad Hoc
Unit: GRAY
Confidentiality: Confidential

System Properties:

3. Click the “delete” button on the confirmation pop-up window.

Are you sure you want to delete Gray Department Review Committee?

Properties

| | |
|------------------|----------------------------------|
| Name: | Gray Department Review Committee |
| Type: | Standing |
| Unit: | GRAY |
| Confidentiality: | Non-Confidential |

System Info:

| | |
|--------------------------|-------------------------------|
| Date Created: 06/13/2017 | Date Last Changed: 06/13/2017 |
| Created By: GRAY, STAFF | Last Changed By: GRAY, STAFF |

Members

| Name | Title/Series | Unit | Membership |
|------------------|----------------|------|------------|
| GRAY, Academic 3 | PROF-AY | GRAY | Chair |
| GRAY, CHAIR | PROF-AY | GRAY | Member |
| RED, Academic 2 | SR LECT SOE-AY | RED | Member |



Assigning Committees from the Committee Details Page

1. Enter the committee list screen by selecting the “Committees” tab or by clicking the “Committees” hyperlink on the homepage.
2. Click on the committee name hyperlink to enter the committee details screen.
3. Click on the “Files” tab on the committee details page.
4. Within the “File(s) Pending Notification” section, click the “Assign File” button.

Home | Review Files | **Committees** | AP Data | External Tools

Committee List > Committee Details > Committee Files

Gray Department Review Committee : Details Edit Copy Delete

Properties | **Files**

- File(s) Pending Notification

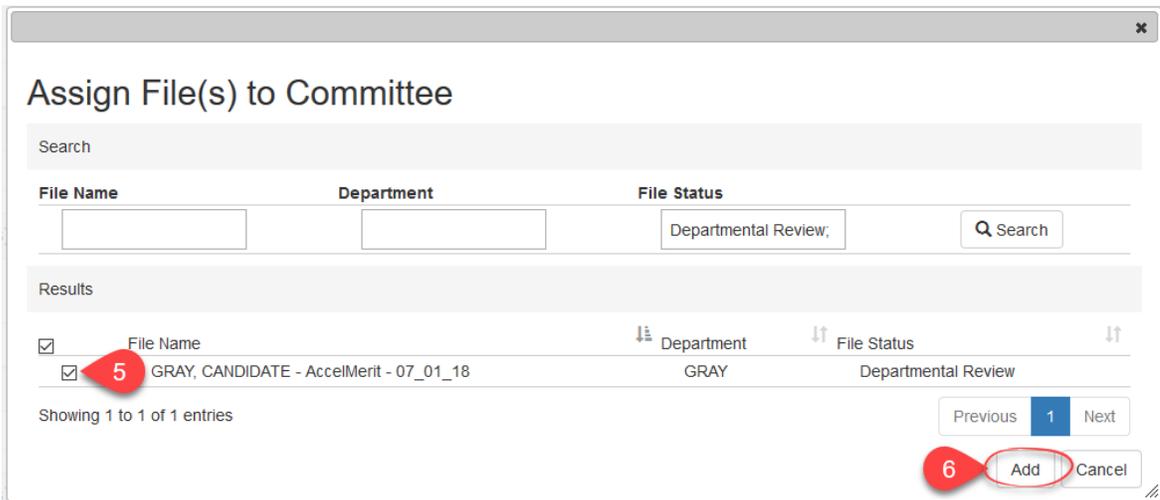
Assign File Package File(s) and Notify Unassign File(s)

| <input type="checkbox"/> | Name | Date Assigned | Department |
|----------------------------|------|---------------|------------|
| No data available in table | | | |

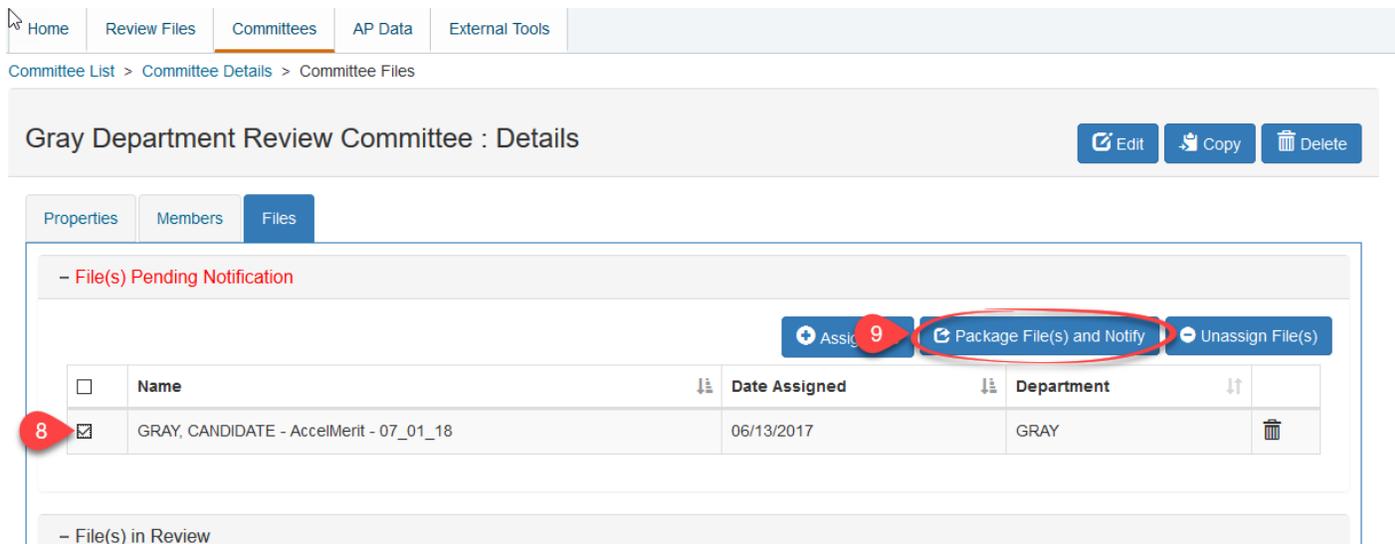
- File(s) in Review

End Committee Access Re-Notify Unassign File(s)

5. Select the file that you wish to assign to the committee from the pop-up window. You may need to limit your search by file name, department, or file status prior to files displaying in the pop-up window.
6. Click the “Add” button.



- 7. You will return to the committee details page where the assigned file will now appear in the “File(s) Pending Notification” section on the “Files” tab.
- 8. To notify the committee that the review file is ready for their review, check the box next to the file name.
- 9. Click the “Package File(s) and Notify” button.



- 10. The committee notification pop up screen will display all committee members that will be notified. Enter any relevant information in the provided supplemental text box and click the “Send” button.
- 11. You will return to the committee details page where the file will now appear in the “File(s) in Review” section on the “Files” tab.