

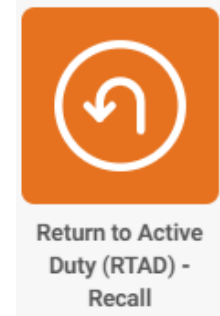
Kuali RTAD Form FAQ - [Kuali RTAD link](#), [Kuali Build](#)

**This FAQ is a work in progress. Be sure to check back regularly for updates/improvements to the submission process/workflow, new questions, and answer clarifications!
(Last updated on 10/7/2026)*

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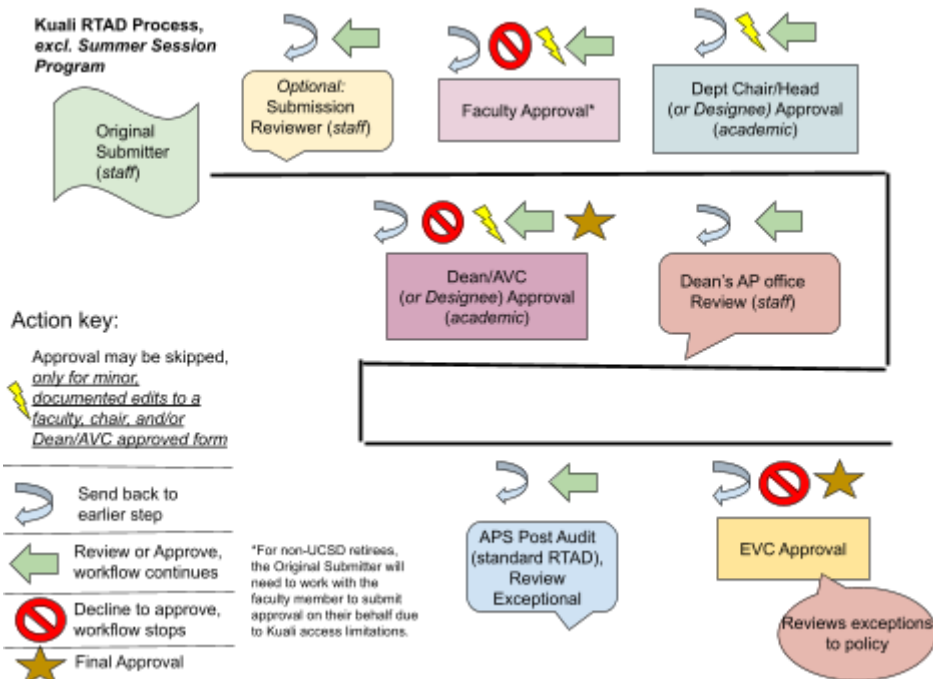
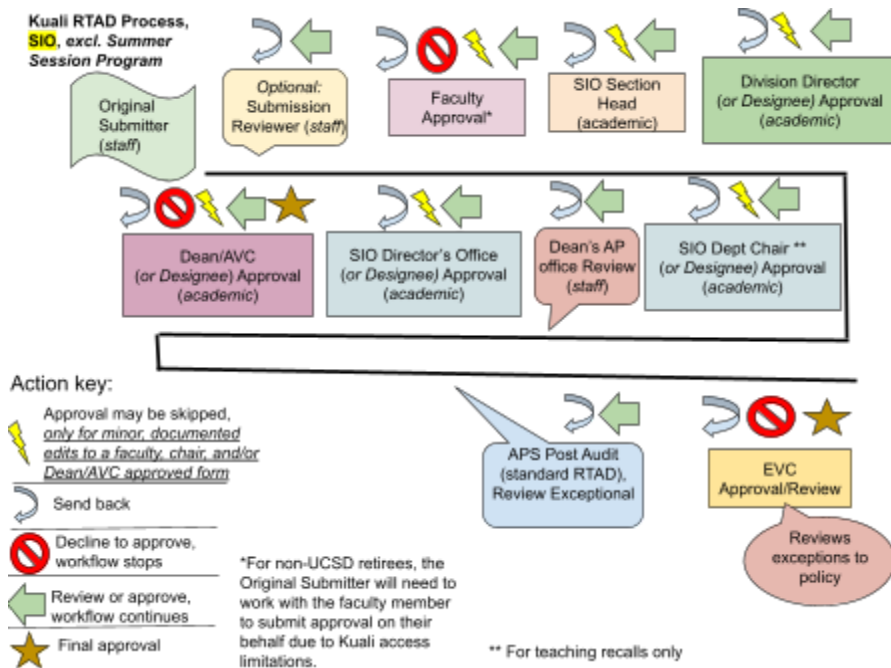
Exceptions to Policy

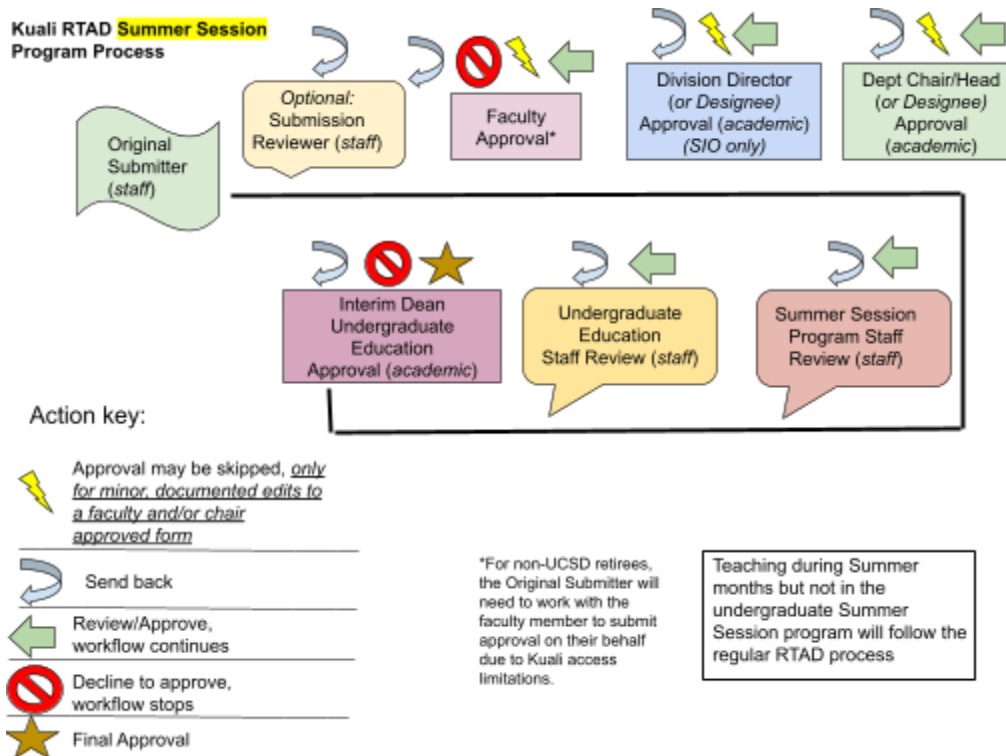
- Q. Is Greater than 3 years of recall service an exception? (No)

New Features added to Kuali RTAD/Changelog

Kuali RTAD Workflow:

Q. What does the approval workflow look like for a Kuali RTAD? **Updated**





Q. What is the “Minor Edit” bypass function, and how do I use it?

For RTAD submissions where a faculty member, the department chair/head (or designee/equivalent), SIO Section Head (*SIO only*) divisional director (*SIO only*), Director (*SIO only*), and/or the Dean/AVC (or designee) have already approved an RTAD form but the form must be sent back to the submitter (and/or Dean AP staff) for minor fixes, use the the “minor edit bypass” function to move a form between staff (and required approvers), e.g. submitter, Dean AP, Summer Session Program AP and/or APS to avoid triggering duplicate/unneeded notifications and approval requests.

- All approvers (Academics: faculty, Chair, Div Director, Section Head, Director, Dean/AVC, EVC) and reviewers (Staff: submitter, Dean AP, APS, Summer AP) can send a form back to the submitter/submission reviewer (and/or Dean AP) and instruct them to fix errors on the form.
- The minor edit bypass **routing** can be initiated by the Submitter/Submission Reviewer (and Dean AP for forms submitted after 7/2)

- Dean AP can make minor edits to the “pre-retirement” questions without needing to route the form back again.
- After fixes are made, advance the form again with the “minor edit bypass” function turned on, this will send the form up to Dean AP, and then APS (or Summer Session Program staff for Summer Session Program).
 - To activate the “minor edit bypass” function, answer “Yes” to the question, “Was this form sent back for minor edits?”
 - Note: Reconsider if you still need a “submission reviewer” when using the minor edit bypass function. If the submitter leaves the question “will this require secondary staff review,” to Yes, the submission reviewer will remain in the routing.
- **Not utilizing the “minor edit bypass” function treats the submission like a new submission, all approvers (faculty, department chair, divisional director, director, and Dean/AVC or their designees) will need to provide approval.**
- Submitter/Submission reviewer and Dean AP can respond to the question “Which approvers need to (re)submit approval?” with the answer “Chair,” “Dean/AVC,” “Divisional Director” and “Director” to indicate which approver(s) still needs to re-submit their approval, if applicable.
- **NEW:** Forms are being sent back because approvers are not seeing signatures submitted by the Faculty/Chair/Dean/AVC.
 - Initial signatures will get overwritten/deleted from the form if the form is sent back for minor edits.
 - **To ensure your submission is not returned inadvertently again, please indicate in the Minor Edit Report which approvers had already approved the form if they are being skipped.**
 - For example, *“Sent back for minor edits to funding, Faculty/Chair/AVC approved, signatures overwritten due to sending form back for Minor Edits only.”*
 - Background: This addition (of sending to some but not all approvers) to the bypass function was needed for early pilot period submissions when in scenarios where a form had to be withdrawn/duplicated in the middle of the workflow and the form received some but not all needed approvals but a duplicated/re-submitted version of the form did not change substantially.
 - For Summer Session Program teaching recalls, only “Chair” (for SIO, “Divisional Director” and “Chair”) is functional.

To Dean AP Reviewers

Submitters/Submission Reviewers are using the "minor edit bypass function" because this (or a withdrawn) RTAD form already obtained one or more approvals. This form will bypass documented approvers to avoid requesting re-approvals from documented approvers. The selection below indicates who still needs to either approve or re-approve.

If no approver needs to submit an approval, "no" should be selected to the question, "Does any approver need to re-approve or resubmit their approval?"

Submitters must not use this bypass function for **substantial edits**.

Was this form sent back for minor edits? *

Indicating "Yes" will trigger the bypass function. If this form was advanced inappropriately, or lacks sufficient information explaining what changes were made, APS reviewers will return the form.

Note: only submitters and submission reviewers can make edits to the content of the RTAD form.

☒ Yes
☐ No

Does any approver need to re-approve or are there approvers who had not yet submitted their approval? *

☒ Yes
☐ No

Which approvers will need to submit/re-submit approval? *

If all approvers (faculty member, department chair/Director and Dean/AVC) must approve, go back to the question "Was this form sent back for minor edits," and click "No" to the minor edit question. Substantial edits should not be handled with this bypass function.

Re-submitted RTAD forms lacking evidence of previous approvals, eg Faculty, Chair and Dean/AVC, will be sent back to the submitter. Please reference "withdrawn" case numbers if approvals were already received.

☐ Dept Chair
☐ Dean/AVC
☐ SIO - Section Head
☐ SIO - Division Director
☐ SIO - Director's Office

This form may not progress until text is entered in the Minor Edit Report

Minor Edit Report *

Please list all items that required correction. If this information is missing or not clear, APS analysts will return the RTAD form.

Also include a listing of who approved the form already; forms sent back will make previously obtained signatures disappear.

If this case was withdrawn/duplicated and re-submitted, please indicate the number of the withdrawn case.

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- **SIO only** - adding an approver to the minor edit report function who did not review the form previously will create an error in the workflow. For example, asking the SIO Dept Chair to re-approve a non-teaching RTAD.
- **Note:** Faculty notification/approval is always skipped with this bypass function. **If faculty must re-approve, do not use the "minor edit" function, faculty re-approval implies substantial edits were needed and must be reviewed again by all approvers (Chair, Dean/AVC).**
- **NEW:** Dean AP can make edits to **pre-retirement questions** responses. Dean AP can note changes they've made in the Minor Edit Report.
- **NEW:** Dean AP can change the selection of which approvers would get bypassed (i.e. who would get skipped, e.g. Chair).

APS analysts will verify that there are existing approvals on the form from the faculty member, chair, and Dean/AVC based on the status log (or referenced withdrawn case).

- Best practice: when sending back and forth (submitter to Dean AP and/or APS), clearly indicate on the "minor edit report" what errors were corrected.
 - **New:** Approver roles and date approved will be added by the user in a separate box to standardize responses.
- **Signatures will get overwritten/removed from the form if the form is sent back for edits. Always indicate in the Minor Edit Report who signed the form if signatures got overwritten, see above.**
- If you must withdraw/duplicate the form to resolve an error, indicate the submission number (eg 0124) in the minor edit report so that APS can look at that submission in case there were signatures received there.
- *If this minor edit report is lacking sufficient information, requires clarification, or the errors were determined to be substantial, APS/Summer Session Program analysts will ask for more information and/or return the form to the Dean's AP office and/or require faculty/chair/dean/AVC to resubmit their approval.*

Q. What is a "minor edit?"

Minor edit examples include, but are not limited to, incorrect salary scale(s), retirement date, titles/job code pre-retirement, missing range adjusted salary (particularly for 0%

appointments), miscellaneous typos, removing an exception to policy request when an exception request was not needed (eg, renewing an RTAD appointment for a faculty member who had served more than three (3) cumulative years - ***not an exception***).

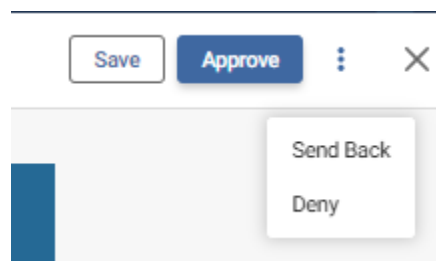
Please reach out to APS if you have a question as to whether an edit is considered minor or not.

Q. What isn't a "minor edit?"

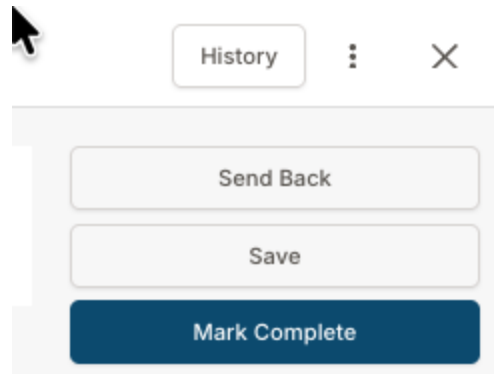
Edits that are beyond "minor" include, but are not limited to, omitting an exception to policy request (eg. 0% teaching as instructor of record), increasing/decreasing the proposed salary, increasing/decreasing the percentage of effort, modifying the recall purpose(s), modifying features of the recall (e.g. space assignment, students supported, class titles to be taught), changing the start/end date. Please reach out to APS should you have a question as to if an edit is substantial or not.

If the start/end date or other substantial detail must be updated on an already EVC approved RTAD, please reach out to your APS analyst for further assistance.

Q. What are the common actions that happen to the Kualu RTAD form?



- When a form gets **saved** it will appear in the submitter/reviewer/approver's queue but not get submitted. Saving a form keeps your progress up to date but will not advance the form.
- When a form gets **sent back**, the form moves to whichever step was indicated by the last reviewer/approver. For example, if the form gets sent back by the Chair to the original submitter for *substantial* edits, the form will return to the original submitter who will then make edits and then advance the form to the Faculty and then the Chair again. **Do not use the "minor edit bypass" function for substantial edits.**



- When a form gets **denied**, the original submitter will get a notice saying which approver denied the form. If the RTAD is still needed, the original submitter will need to make a new submission.
 - Denial may only be performed by the faculty, Dean, Dean-UE (Summer Session) and EVC.
- When a form gets **approved** by the Faculty, Dept Chair/Head (or designee), Division Director, Director and Dean/AVC (or designee) then the original submitter will get notifications of the approvals.
 - Faculty will get notification after they sign their own form telling the faculty the form is now being routed ahead to higher level approvers.
- When a form gets **mark completed** by a staff reviewer, the form is moved forward to the next step, usually an academic approver.
- When a form gets a **final decision (approval or denial)** by the Chancellor, EVC or Associate Dean of Undergraduate Education (Summer Session Program only) then all reviewers (submitter, Dean AP office, APS analyst) as well as the faculty member (excluding Summer Session Program teaching) will receive a notification with a copy of the completed form with signatures.
- When a form **skips** an approver, the form is making use of the bypass function whereby one or all documented approvers are not being routed to again if only minor edits were made to the form.
- When a form is **saved** changes to the form are applied; however, the form remains on the current step without advancing.

Q. There's an error/mistake on my RTAD form. Should I send the form back or just withdraw/duplicate and try again?

- "Sending back" an RTAD form to any step of the routing means that whoever the approver/reviewer is at that step will need to review the form again. (Eg, Dean's AP office sends a form back to the original submitter if a form needs minor fixes.)
- **The original submitter can "withdraw" a form at any time**, this pulls the form out of the routing workflow so that no further review/approval can be done. Submitters can then "duplicate" their withdrawn forms to copy over all entered data and make changes as needed.
- An additional benefit of withdrawing and duplicating is that if there may have been updates/improvements to the Kuali RTAD form since the original submission, the newly duplicated form would have the latest updates implemented.
 - New: you can now withdraw a submitted form and then make edits to re-submit the form. This will allow you to benefit from changes made since the form got withdrawn as well as avoiding creating duplicate forms in your "my documents."
- If a form received only partial approval due to a Kuali coding error, withdrawing and re-submitting an RTAD with the bypass function can send the form directly to the appropriate approver/reviewer without delay. Be sure to indicate that the form was previously withdrawn and resubmitted to overcome a Kuali coding error.
 - You cannot withdraw a completed Kuali form.

The screenshot shows the Build system interface. At the top, there's a header with 'Build' logo, navigation links (Home, Action List, My Documents), and a 'What's New?' notification. Below the header, there's a section for 'Submitted' and 'Drafts' forms. A specific form is highlighted with details: ID 0426, Submitted Feb 22, 2024 at 8:10 AM, Status IN PROGRESS, and buttons for 'Withdraw' and 'Duplicate'. Below this, there's a 'View' button and a 'Review' toggle switch. At the bottom, there's a table listing multiple submissions of the 'Return to Active Duty (RTAD) - Recall' form. The table has columns for Form, Title, Date Submitted, Time Elapsed, Status, and Actions. The first row shows the form is 'IN PROGRESS' and has a red arrow pointing to the 'Withdraw' button. The second row shows the form is 'COMPLETE' and has a 'Withdraw' button. The third row shows the form is 'WITHDRAWN' and has a 'Duplicate' button.

Form	Title	Date Submitted ↓	Time Elapsed	Status	Actions
Return to Active Duty (RTAD) - Recall	0426	Feb 22, 2024 - 8:10am	40 minutes	IN PROGRESS	Withdraw
Return to Active Duty (RTAD) - Recall	0362	Feb 12, 2024 - 1:52pm	10 days	COMPLETE	Withdraw
Return to Active Duty (RTAD) - Recall	0360	Feb 12, 2024 - 1:43pm	10 days	WITHDRAWN	Duplicate

Q. I accidentally submitted multiple Kuali RTAD forms for one faculty member to cover the same time period. What should I do to resolve this error?

- Decide which submission you wish to remain active and recorded in the system. For all other duplications/erroneous submissions, be sure to "withdraw" those forms so that that

Kuali form is not in the queue of a reviewer/approver and could be inappropriately routed concurrently alongside the *correct* RTAD form.

- You will see all your submissions in the “My Documents” portion section of your Kuali dashboard.
- Note the correct form’s individual number so you can distinguish which erroneous form(s) will be withdrawn.

Q. I accidentally withdrew the wrong RTAD document. Can I reverse this withdrawal?

- NEW: Yes, you can make edits to a withdrawn form and re-submit it. You can also duplicate the document and re-submit it.
- Please indicate what is the RTAD document number (eg #0153) that contains documented approvals/signatures in the minor edit report and indicate which approver did not yet provide their signature.

Q. Who is a Kuali RTAD “submission reviewer?”

- If the original submitter needs/wishes to add another staff member as a reviewer of the Kuali RTAD form before the form advances to the faculty member, another staff member can be indicated on the RTAD form.
- Adding a submission reviewer is *optional*. Please follow your department/area's practices.
- The submission reviewer can edit/overwrite all entries on the RTAD form, send the form back to the original submitter, upload documentation, and advance the form forward to the faculty member (or Dean AP reviewer if conducting minor edits).
- If the submitter uses the minor edit bypass, if the submission reviewer is in the routing, they too will get routed to. If the submitter does not wish to route back to the submission reviewer again, indicate “no” to the question of including a submission reviewer.

Q. Who gets notified and when?

- After each action (review and/or approval), the **original submitter** gets a notification of the RTAD’s status. Original submitters/APS can view the current status of the form by navigating to <https://ucsd.kualibuild.com/build/space>
- After the Faculty approves their own form and after the final decision is made, the **faculty member** will receive a notification that they approved their step.
- After the Dean and EVC/Chancellor’s review (if exceptional), the **Dean’s AP office** will receive status notifications.
- If a form is bypassing the faculty/department chair/Dean/AVC for only minor edits, the faculty, Chair, and Dean/AVC will not get notified when the revised RTAD form is sent back and forth between original submitter/submission reviewer and their respective Dean’s AP reviewer, APS or Summer Session Program AP.

- Special case: If a submitter indicates that some but not all approvers are to be bypassed, only the approver(s) who will (re)submit their approval will get notifications.
- Automatic reminders to review/approve an RTAD form are sent every 7 days after the initial notification.
- APS can re-send notifications if you think an approver has lost their email notification.
- Submitters do not get recurring reminder notifications if a form was returned to them and remains in their queue, that is, the first step in the form submission process.

Q. Who can be a designee as alternate approver for the Department Head/Chair, Division Director, Director, and/or Dean/AVC?

- Only academic appointees may fill these roles.

Q. I see the Department Head/Chair and/or Dean/AVC approver information is outdated, i.e. a new or interim Chair or Dean was appointed. How can that information get updated?

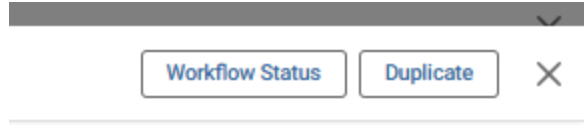
- APS regularly reviews updated department and dean appointments. If any information is not updated as expected, please send an email to your APS analyst to get this information updated before you submit your form.
- Email Nick Erickson at nsericks@ucsd.edu to get Chair/Dean/Div Director/Director updated if the role has permanently changed.
- Dept Chairs and Interim Department Chairs are added as the automated approver for their respective areas. Temporary or acting department chairs are not typically added as automated approvers given their temporary status.
- For temporary or one-time recusals, indicate an alternate approver for that routing step.

Q. How do I see where my form is and at what approval/review step? (Submitter/APS)

- From the main page, <https://ucsd.kualibuild.com/build/space>, navigate to your documents here:

Build					
Home		Action List 1	My Documents	What's new? 1	NS
Submitted		Drafts (50)			
Form ↓	Title	Date Submitted	Time Elapsed	Status	Actions
Return to Active Duty (RTAD) - Recall	0032	Sep 25, 2023 · 4:52pm	about 1 month	COMPLETE	⋮

Look to the upper right corner to see "Workflow Status"



- Submitters, Submission Reviewers, and Dean AP staff may see submissions in their area by checking this Document List:
<https://ucsd.kualibuild.com/app/6340a178f37d0325968fe933/page/6340a178f37d0325968fe933/document-list?id=6aa1840956c64502987b224a>
- Other staff who were not indicated in the RTAD form as any of the three categories above will not be able to view the status of an RTAD form in their area.
- Alternatively, if you wish to know the current status of a form, please reach out to either the submitter or [their designated APS analyst](#).
- Unfortunately, should a submitter leave an department/unit, and a form is returned to them, the form cannot be duplicated and re-submitted. A new form will need to be submitted. Kuali software will soon address the issue of “multiple submitter” who can work on the same form.

Q. I think my form is stuck on an approver/reviewer. Do they get reminders? How can I get the form to move forward again?

- If you are concerned that your form is not being viewed by the current approver/reviewer, there are a few ways to get the individual’s attention:
 - Kuali RTAD sends automated weekly reminders (every 7 days) to reviewers/approvers if no action has been taken.
 - Approvers (eg Faculty, Dept Chair) will see an email with the subject: “Your approval is required...”
 - Reviewers (eg Submission Reviewers, Dean AP) will see an email with the subject: “Kuali task...”
 - **Kuali does not send reminders to submitters when a form has been stuck with a particular reviewer/submitter.**
- Submitters/APS can see where the form is by checking the status page, they may email that individual/group to ask about their status.
<https://ucsd.kualibuild.com/build/my/submissions>
- If you are concerned that the reviewer/approver has lost the email containing the Kuali notification to approve/review, APS analysts Nick Erickson (nsericks@ucsd.edu) or Nicole Hendricks (n2hendricks@ucsd.edu) can re-send a Kuali approval/review email to the current approver/reviewer.
- **When the submitter searches for a Faculty Member, Designated Chair or Designated Dean/AVC, be mindful of the active directory entry. There may be multiple entries for the same individual and therefore selecting an incorrect one will prevent Kuali emails from reaching the individual’s email inbox.**
 - Best practice is to search using the prefix of the faculty's UCSD email address. For example: **JDOE** @ucsd.edu

- Refer to the [Blink look-up tool](#)
- **If you notice an issue for one you have already submitted, reach out to Nick or Nicole to get the step re-assigned to the individual's current email address or troubleshoot any other issues.**

Q. I realized late that I either entered an incorrect alternate approver for Department Head/Chair and/or Dean/AVC, or that person is no longer available to perform this role. How do I pull back the form to my step, or can I reassign that review step to a different person?

- The current approver/reviewer can send the form back to the original submitter/submission reviewer (if applicable) to make the change.
- If the current approver/reviewer cannot perform this action, reach out to APS analysts Nick Erickson (nsericks@ucsd.edu) or Nicole Hendricks (n2hendricks@ucsd.edu) and we will either return the form to the submitter step so that a new alternate approver can be added.
- Department Head/Chair designees and/or Dean/AVC designees themselves must be academic appointees.
- SIO Section Heads do not have the option for alternate approvers. If this individual is unavailable, please reach out to Nick or Nicole to initiate an administrative bypass.

Q. Who at the Dean AP office gets notifications/tasks to review? Who at the APS office?

- All Dean AP contacts receive a notification when a Kuali form reaches their step. The notification email will specify the name of the faculty, the respective department, and the effective date.
- Forms will be sent to the [designated APS analyst](#) and their backup based on the RTAD appointing department.

Q. Can a separate UCSD email account get notifications?

- Yes, with the question asking about "additional email accounts," indicate Yes and then manually enter the email inbox that should receive approval notifications.

Q. I submitted a Kuali RTAD form during the early period of the Kuali RTAD pilot and do not see the option to bypass the Faculty's/Department Chair's/Dean's/AVC's approval steps for "minor edits." What should I do to see the bypass options?

- Unfortunately, updates/Improvements made to the Kuali RTAD form implemented after a preparer submits their RTAD form are not retroactive.
- If your Kuali RTAD form needs to use the minor edit function and you do not wish for the form to require faculty/chair approval again, you can withdraw the form, duplicate it, and then re-submit the form and indicate "minor edits" to bypass the faculty/chair/dean.
 - Be sure to [note to your designated APS analyst](#) that you received faculty/chair approval before, but could not bypass them due to your form being part of the early Pilot group.

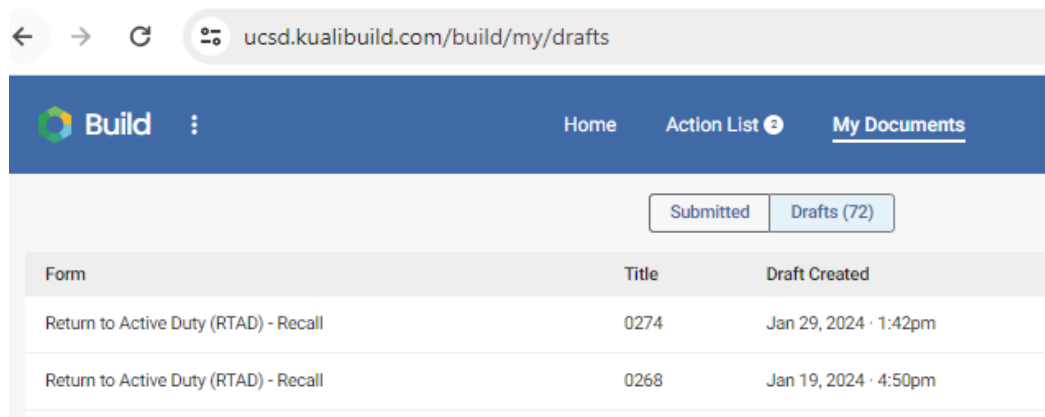
- The withdrawn/duplicated RTAD form will now have the bypass fields. You can indicate the RTAD application number in the “minor edit report” to allow the APS analyst reviewers to quickly refer to the old faculty/chair approved RTAD form.

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Submission Questions:

Q. I worked on and saved a few Kuali RTAD forms, but where are they saved?

- Navigate to My Documents in the Kuali Dashboard, here: <https://ucsd.kualibuild.com/build/my/submissions>. You will see your submitted documents and any Drafts that have not yet been submitted.
- Unfortunately, submitters/Dean AP cannot adjust their view of the Dashboard beyond seeing the following headings “Form,” “Title,” “Date Created,” and “Time Elapsed.”



The screenshot shows a web browser window with the URL ucsd.kualibuild.com/build/my/drafts. The page header includes the 'Build' logo and navigation links for 'Home', 'Action List', and 'My Documents'. Below the header, there are tabs for 'Submitted' and 'Drafts (72)'. The main content area displays a table with three columns: 'Form', 'Title', and 'Draft Created'. The table contains two rows of draft entries.

Form	Title	Draft Created
Return to Active Duty (RTAD) - Recall	0274	Jan 29, 2024 · 1:42pm
Return to Active Duty (RTAD) - Recall	0268	Jan 19, 2024 · 4:50pm

- You can also see all submissions and their status on the Document List: <https://summersession.ucsd.edu/documents/index.html#appointment-payroll-documents>

Q. When will the Kuali RTAD form be fully rolled out across campus?

- Beginning Winter Quarter 2024 (1/1/2024), all RTADs must be submitted with the Kuali RTAD form.
- RTADs following standard processing, i.e. no exceptions associated, will be delegated to Dean authority as of 10/1/2026.

Q. My Department will recall a faculty member for the Summer Session Program. Should I use the Kuali RTAD form?

- Yes, go ahead and submit their form for the Summer Session Program. Be sure to only select “Teaching (Summer Session Program)” for the recall purpose. The dean of undergraduate education will serve as final approver. Please follow summer session guidance for entering information: <https://summersession.ucsd.edu/documents/index.html#appointment-payroll-documents>

Q. My Department will propose a recall of one faculty member with the appointment split with another department (joint recall). Is there anything different for these requests?

- Each department who will support the recall will need to submit their own Kuali RTAD form. Please work with your counterpart to ensure that both departments submit their own forms in a timely manner.
- The combined percentage of effort cannot exceed 43%.

Q. My Department intends to recall a faculty member who retired from a different UC (e.g. UC Irvine). Do I still need to submit a [Multi-Location Appointment \(MLA\) Form](#)?

- Yes, if a department proposes to recall an academic who retired from another UC campus, the department should notify the home campus of the proposed appointment and obtain the necessary information to complete the Employee Information and Status at Time of Retirement sections. Coordination between campuses is imperative to ensure that the maximum annual compensation limit is not exceeded.
- Give yourself enough time for the MLA form to process, usually 1 to 4 months in advance of the start of the proposed service period.
- Note: Presently, non-UCSD Retirees cannot access the Kuali RTAD form as an approver, the original submitter will need to work with the non-UCSD retiree closely and submit acknowledgement of the retiree terms & conditions on their behalf.
- Non-UCSD retirees also need to submit an [Employee Misconduct Disclosure Kuali form](#). If recall titles are not listed, they should select “other” and then write
 - “Recall Teaching - 1700”,
 - “Recall Teaching Non-Senate - 1699”,
 - “Recall Faculty - 1701 or 1702,” or
 - “Recall Non-Faculty - 3802 or 3812”

Q. I see new fields/questions on a recent RTAD form compared to one I worked on previously. Where did these new fields come from and will the new fields/questions also appear on my old submissions?

- During this early stage of implementation, the Kuali RTAD will see some minor adjustments to improve the experience and transmission of necessary information for seamless routing and processing.
- Changes implemented are not retroactive. If you find an “in process” form that would benefit from having the new fields/questions, you can withdraw a form, duplicate it, and then re-submit it so that you would see the new fields/questions on the refreshed RTAD form.

Q. The RTAD form prevents me from submitting because it says there are errors present. What should I do?

- The errors are likely caused by a required field not being answered or having data entered. Double check all entries to ensure you have answered all required questions that have a **red asterisk (*)**, eg “School” field is often left blank.

- Kuali Forms occasionally have data validation requirements that prevent the user from submitting a form if an answer is insufficient or inappropriate to what is being asked for, for example: answering “No” to all Recall Role questions.

Q. I see a prompt when I open a saved draft saying “this form is out of date,” what should I do?

- APS analysts occasionally make updates to the Kuali form/workflow. When you start a draft and then open it back up again after an update has been implemented, you will see this “out of date” prompt. Not to worry, you will not lose any progress or saved data.
- Updating a form is a required step before you can submit a Kuali RTAD form.

Q. I need to update the start/end date, percentage of effort, or duties on an already approved Kuali RTAD submission. What should I do?

- Kuali RTAD does not permit edits to approved RTADs. Please contact your APS analyst to notify them that a change is needed. The APS analyst will route to the submitter/Dean AP an annotated RTAD form which will require the appointee to sign/approve.

Q. How soon do I need to submit RTADs? What should I do if the proposed start date has already passed and the form has not yet been approved?

- **Note:** To ensure reviewers have sufficient time to review RTAD requests, each request should be submitted to Academic Personnel Services (that is, Kuali RTADs have received approval by the Dean/AVC or their alternate) **no less than 30 days** in advance of the proposed effective date.
- **Note:** Non-standard (exceptional) RTAD requests as defined in the [RTAD guidelines](#) (or includes a different exception to policy) should be submitted **no less than 60 days** in advance of the proposed effective date.
- Consider changing the start date of the proposed recall.
- Contact your [designated APS analyst](#) if the start date cannot be moved out later.

Q. The appointing department/School is different from the recalled faculty’s pre-retirement home department/School. Do I need to get the approval of the pre-retirement home department/School as well?

- No, pre-approval is not needed from the pre-retirement location.
- If the recalled faculty will have a joint or separate appointment with another department, each location will submit their own individual RTAD form.
- Joint RTAD appointments’ combined % cannot exceed 43% per [APM 205-16.a](#).

Q. My form got returned back to me by accident and it already has signatures/approvals, how should I handle this scenario?

- If the form had no changes **and** the faculty/chair/dean already approved the form, say “yes” to the minor edit bypass question, and say “no” to the question does anyone need to submit approval so that the form skips those approvers.
- If the form had no changes **and** some of the approvers (but not all) approved the form, say “yes” to the minor edit question, and “yes” to the re-submit approval question. Indicate who needs to submit their approval still (eg case never hit Dean)
- Not triggering the minor edit bypass function treats the form like a new submission, therefore all approvers will get asked to approve once more even though nothing has changed.

Q. My School (e.g. School of Social Sciences, Jacobs School of Engineering) rather than a Department itself will be the appointing department/authority. Or, we want to appoint for a Specialized Program. Who serves as Dept Head/Chair?

- Approvers may only be academics, not staff. A staff member will automatically appear when you select the School’s name rather than the Department in the “Appointing Department” question. You will need to replace the Dept Chair approver role by selecting “Yes” to the question, “Is an alternate approver needed...?” Then, select “Dept Head/Chair” and then enter the academic’s name.
- For specialized programs that occur at the School (Summer Programs that are not in the undergraduate Summer Session Program, or Executive Education programs), input the Dean/AVC as the approver in both the Dept Chair and Dean roles. Please ensure the RTAD is addresses that the submission is for a specialized program.
 - You will see a notice about having the same alternate dept chair as the Dean/AVC, dismiss the notice if you are proceeding as advised above.

Q. What do I do about “Pathways to Retirement” submissions?

- The Pathways to Retirement now has its own Kuali form. You can submit here: <https://ucsd.kualibuild.com/app/63d49c4dd454fc8a3121632a/run>
- This Kuali form is administered by Heather Zion. Reach out to hzion@ucsd.edu if you have any questions about a “Pathways to Retirement” submission.

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RTAD Form Content:

Q. I uploaded a few documents in the “additional documents” sub-section in the Employee Pre-Retirement section. Some of these documents have information/data that

answer RTAD form questions. Could I just write, “see attached” in fields that have their answers in uploaded PDFs?

- No, the additional document sub-section allows submitters to supplement the RTAD submission and provide documents required per departmental/area procedures.
- This additional document section does **not** replace answering required questions on the RTAD section.
 - Forms that indicate only “see attached” for required questions will get sent back for revisions and may delay overall processing time.
- Best practice: provide the direct answer to a question, and include “see attached” if further elaboration is necessary.

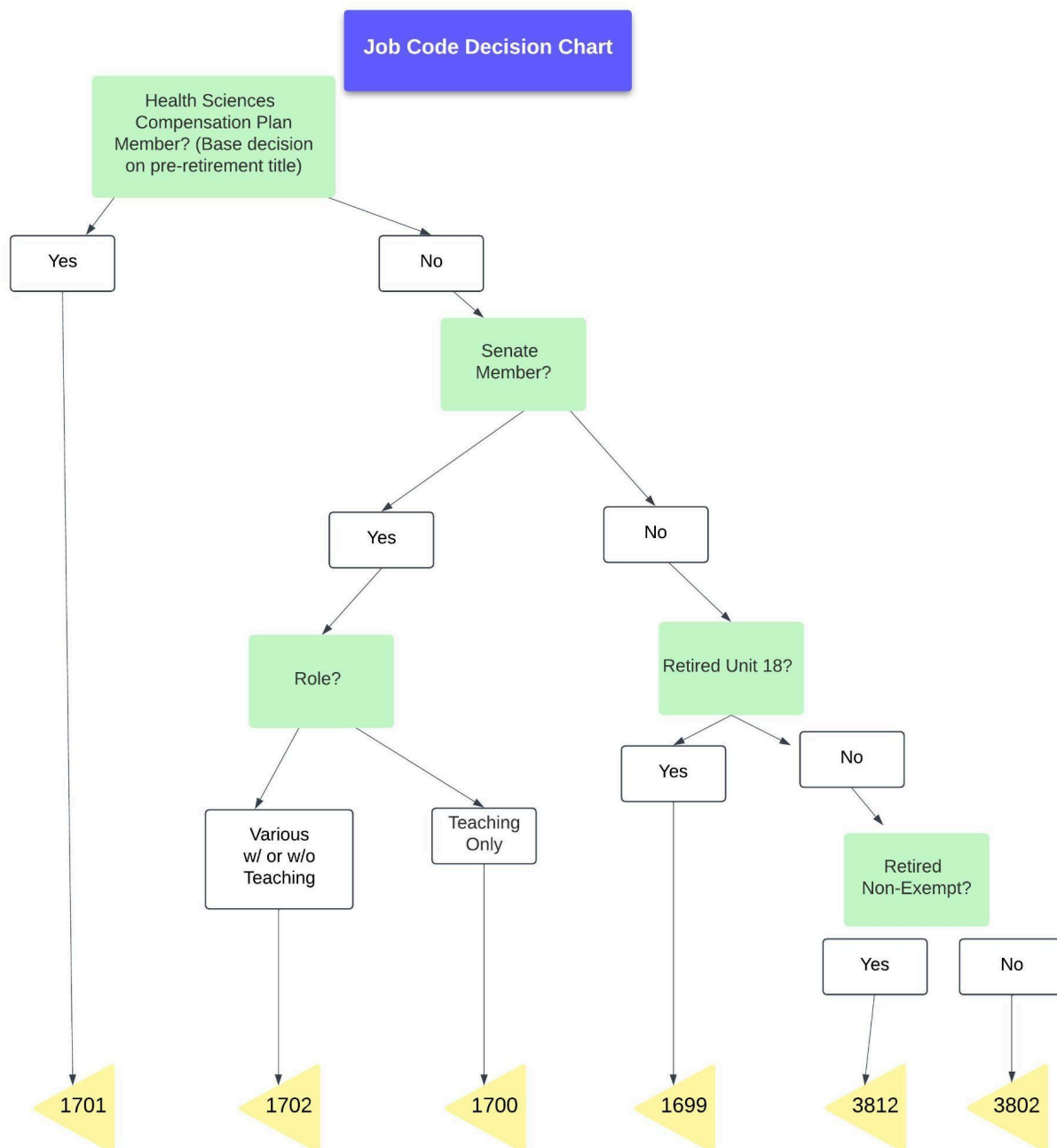
Q. What should I write in the “department long-term plans” section?

- Please provide a full description of the department’s plan for covering the teaching and/or administrative responsibilities provided by the recalled faculty member. Should a faculty member not be recalled to that role in future academic years, what will the department do to adjust to the vacancy? If recruitment is being pursued, please elaborate on that effort. If a different faculty member will be assuming the responsibilities held by the faculty member, please provide that information.

Q. What should I write in the question, “By what process/criteria were such allocations determined?”

- How does your department/area make decisions on how a lab/office/space is allocated? Is there a space committee? Is there some other authority making the decisions? How are they making the decision?

Q. Which recall title code should I choose?



- **Senate Member:** (See [APM 110-4\(4\)](#)) Prof, Prof-in-Res, Prof Clin X, (S)LSOE (Teaching Professor)
- **Non-Senate Member:** (See [APM 110-4\(27\)](#)) HS Clin Professor, Adj Professor, Specialist, Researcher, Proj Scientist, Unit 18 (Sr.) Cont. Lecturer, Continuing Educator, Academic Coordinator, Academic Administrator, Librarian, UNEX Teacher
- **HSCP Members** (See [APM 670-14](#), 50% or higher, funded by one or more participating HS unit): Professor, Professor in Residence, Professor of Clin X, Adj Professor, Acting

Professor, Visiting Professor, Health Sciences Clinical Professor, Health Sciences School Dean titles

Q. My recall faculty appointee tells me their name does not appear correctly on the RTAD form. How do I edit how the name appears?

- On the form, answer “No” to the question “Did the name display correctly.” If the name did not display correctly, then you would manually enter the name in the space provided.

The screenshot shows a form with the following sections:

- UC San Diego retiree? ***
 - ☒ Yes
 - ☐ No
- Faculty Name *** (with a help icon) and **Email**
 - Faculty Name: A dropdown menu showing "Export Control" with a close icon.
 - Email: A text input field containing "export@ucsd.edu".
- Employee ID (auto-filled)**: An empty text input field.
- Did the name display as preferred? ***
 - ☒ Yes
 - ☐ No
- Did the employee ID display correctly? ***
 - ☒ Yes
 - ☐ No

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Q. We intend to recall our faculty with a by-agreement (BYA) payment for teaching or other work. Is that possible?

- Yes, after indicating “yes” to teaching or “other” as a recall duty, indicate the amount for the by-agreement salary to be paid.
- This by-agreement salary component does not get range adjusted, it is an agreed upon amount established when the recall appointment is offered.
- If the recall is combined with a non-paid recall duty, e.g. research, indicate that the full recall appointment will be 0%, but provide the amount that will be paid via the by-agreement salary component.
- The total by-agreement salary component and other compensation provided to the recalled faculty cannot exceed 43% of the faculty’s range adjusted annual salary at the time of offer.

Q. How do I determine the range adjusted salary of my recall appointee?

- For academics who previously held a represented title, the recall title is non-represented. As such, for each year the prospective appointee was retired, you would range them following the general campus ranges rather than their respective represented title’s salary ranges.
 - Eg. Retired Cont. Lecturer, Step 25 - \$100,000, 6/30/2023; range will move this way: (Stay consistent with guidance in UCOP memo regarding specific title series, e.g. **Policy-Covered Faculty**)
 - Recall Appt as Teaching, Non-Senate - 1699

- Effective **10/1/23** - $\$100,000 * 1.046$ (i.e. 4.6% increase) = \$104,600 [**do not** round up to nearest \$100]
- Effective 10/1/24 - $\$104,600 * 1.042$ (i.e. 4.2% increase) = \$108,993 [**do not** round]
- Effective 10/1/25 - $\$109,000 * 1.032$ (i.e. 3.2% increase) = \$112,481 [**do not** round]
- For former faculty who had an off-scale salary component, follow the same above guidance and range accordingly for each year since retirement
- E.G. Retired Professor, Step 6 with MOS (\$100,000 + \$50,000), 6/30/23. (Stay consistent with guidance in UCOP memo regarding specific title series, e.g.

Policy-Covered Faculty)

- Recall Appt as Senate Faculty, W/ or W/O teaching - 1702
- Effective 10/1/23 - Salary summed together: $\$150,000 * 1.046$ (i.e. 4.6% increase) = \$156,900 [round to nearest \$100]
- Effective 10/1/24 - $\$156,900 * 1.042$ (i.e. 4.2% increase) = \$163,500 [round to nearest \$100]
- Effective 10/1/25 - $\$163,500 * 1.032$ (i.e. 3.2% increase) = \$168,700 [rounded to nearest hundred]
- If a range does not yet exist because it has not yet been published, use the current salary scale/range adjustment % for the applicable series.
- E.G. Retired Researcher, Step 6 with MOS (\$100,000 + \$50,000), 6/30/23. (Stay consistent with guidance in UCOP memo regarding specific title series, e.g.

Policy-Covered Non-Faculty)

- Recall Appt as Research, Non-Senate, Exempt (3802)
- Effective **7/1/23** - Salary summed together: $\$150,000 * 1.046$ (i.e. 4.6% increase) = \$156,900 [round to nearest \$100]
- Effective 7/1/24 - $\$156,900 * 1.042$ (i.e. 4.2% increase) = \$163,500 [round to nearest \$100]
- Effective 7/1/25 - $\$163,500 * 1.032$ (i.e. 3.2% increase) = \$168,700 [rounded to nearest hundred]
- If a range does not yet exist because it has not yet been published, use the current salary scale/range adjustment % for the applicable series.
- E.G. Retired Proj Scientist, Step 6 **without** MOS (\$100,000), 6/30/23. (Stay consistent with guidance in UCOP posted salary scales regarding specific title series, e.g. **non-rep**

Project Scientist (b/e/e or non-b/e/e)

Effective Date (For Policy covered Faculty or Researcher, or Proj Scientist or Specialist)	Increased by %
10/1/2026	4.00%
10/1/2025	3.20%
10/1/2024	4.2%

10/1/2023	4.6%
10/1/2022	4.00%
10/1/2021	3.00%
10/1/2019	5.33%

Q. The retired Unit 18 lecturer I wish to recall held appointments at different departments (department A and department B) with different salary points (salary point 12 and salary point 17) at each respectively. Which salary point should our department use?

- If Department A wishes to recall a Unit 18 lecturer as a 1699, Department A will note the individual retired in their department at salary point 12 and then use that same salary point again when recalling back as a 1699.
- If Department B wishes to recall a Unit 18 lecturer as a 1699, Department B will note the individual retired in their department at salary point 17 and then use that same salary point again when recalling back as a 1699.

Exceptions to Policy:

Q. Do I still need to provide an exception memo if my recalled faculty has greater than 3 cumulative years of service?

- **No**, the updated RTAD guidelines ([link](#)) effective October 1, 2023 indicate that only exceptional recall requests which propose a percentage of effort greater than 43% will require an exception memo addressed to the Chancellor.
- Cumulative years of service in a recall title can be understood in this way:
 - 1st year: 1/1/20 - 12/31/20
 - 2nd year: 1/1/21 - 12/31/21
 - 3rd year: 1/1/22 - 12/31/22 ← three cumulative years have been attained.

Q. Do I need to do anything special for a recall that extends beyond a 1 year period? Do I need to provide an exception memo?

- Please ensure that it is clear that the funding, if applicable, is in place and will cover the entire proposed period.
- No exception memo is needed.
- One recall appointment submission may not exceed a duration of **3 calendar years (36 months)**.

Q. My Department proposes a 0% recall for a teaching role where the faculty will be listed as “instructor of record.” Do I need anything extra for this request?

- **Yes**, non-salaried teaching proposals would require an exception to policy memo addressed to the EVC ([PPM 230-255–4](#)) as well as an [exception analysis form](#)

- The EVC will review this exception to policy and RTAD as long as it does not also include a percentage of effort greater than 43%.
- The department needs to provide a memo clearly outlining the type and amount of teaching the candidate will do, as well as the effectiveness of their teaching in any previous period of appointment.
- When preparing a non-salaried appointment, range adjust their “Annual Salary Rate” to the current salary scale. Because the appointment is non-salaried, for “Total Annual Compensation,” please enter \$0.

Q. My recall appointment request will likely be a different exception to policy. Who should I reach out for more information on how to proceed?

- Start with your Dean AP office for guidance on recall appointment policies.
- If an exception to policy is needed, you would need to fill out an [exception analysis form](#) as well as have a department memo addressed to the EVC.

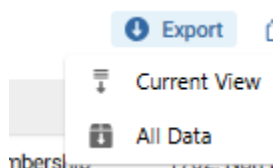
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Kuali Document List

- **NEW:** submitters have visibility of all of their submissions in the Document List: <https://ucsd.kualibuild.com/document-list/6340a178f37d0325968fe933>.
- Dean/VC AP analysts have visibility of all submissions in their School in the Document List
- Submission Reviewers have visibility of all submissions they were indicated on as “submission reviewer.” They may have lost this visibility on forms that were sent back for minor edit and the submission reviewer was removed.
- Only “in progress,” “complete” and “denied” forms may be seen. Withdrawn forms are not presently available in this Document List. Submitters however may see their “withdrawn” forms in their “My Documents” page on the Kuali homepage
 - Columns may be changed based on data points desired.
 - Select “columns,” then search the data point you need to find. Common ones include “CompTitleSIOGC” or “HSCompTitleCode” or “HSCompTitleCodeNonHSCP.” Use “CTRL + F” to open a search window and type in the desired data point

GO	Sort (2)	Columns	Views	Filter
Submitted At	META_DATA	👁		
Submitter	META_DATA	👁		
Workflow Status	META_DATA	👁		
FacultyName	SUBMISSION_DATA	👁		

- Click the eye to show the column in your list. Drag the 6 dots to the left to re-order the list. If a column is very low in the list it'll show at the bottom, you'll need to drag it up to make it appear before earlier listed columns.
- Click the eye again to hide the column in your list.
- Click "Export" to download a CSV file containing the data you have access provided for



- Feel free to contact nsericks@ucsd.edu if you cannot find the data point you would like to include in your document list.

Submitter RTAD Guide

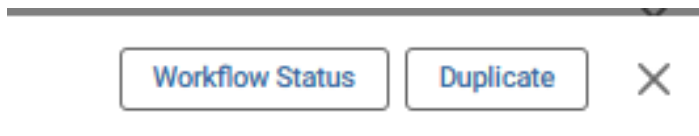
Original Submitter's Process

New: Note for new emeriti being recalled; you will need to input an I-9 for them in UCPATH

- Submitter Instructions:

- Indicate Yes/No to whether you would like to suppress notifications. Selecting "Yes" will prevent Kuali from sending notifications of approvals received at each step. You will still receive a notification on final approval or if there are send backs.
- Indicate Yes/No to whether you would like a 2nd staff member (aka Submission Reviewer) to review the RTAD request before the faculty views the form for their approval
 - Later, indicate No to this question if you are sending forward a form for minor edits and do not want the submission reviewer to see the form again.

- Indicate Yes/No to whether your area would like additional email recipients to receive status notifications.
 - If Yes, indicate the email address. Please indicate addresses used by UCSD only
- Indicate Yes/No to whether this form was sent back for just minor edits. (**The default response is “No.” Leave this answer as “No” if this is a new submission or if substantial edits were needed.**)
 - If Yes, then if the form needs to get reapproval by certain approvers, excluding the faculty.
 - Double-check the workflow status to see if the Dept Chair and/or Dean/AVC or other approver did not approve the form.
 - If an approver did not submit their approval, ensure that a box is checked next to their title to ensure the form gets routed to them (and skips those who already approved).
 - If no one needs to reapprove, then write “No” for “Does any approver need to re-approve or resubmit their approval?”
 - If Yes to the minor edit question, please indicate who approved the form in the “Documented Previous Approvals” and brief summary of change in the “minor edit report.”
 - If faculty/chair/Dean/AVC had already approved the form, please write, for example, “**faculty, Chair and Dean/AVC approved form**” in the Minor Edit Report.
 - **When forms get sent back for minor edits, signatures from Faculty, Chair, and Dean/AVC do get overwritten.**
 - To avoid delays with forms being sent back inappropriately, make sure it is clear on the form which approvals were received, see above.
 - These approvals can be verified by checking “workflow status” located here



- If changes are determined to be **substantial**, change the selection to “No” to “was this form sent back for minor edits” so that Faculty, Chair and Dean can submit their approval once more.
 - If Minor Edits are not fully documented/clarified, APS will return the form to the submitter
 - Minor Edits need not be reported if the form is moving between just the Submitter and Submission Reviewer because no approver would have seen the form.

To Dean AP Reviewers
 Submitters/Submission Reviewers are using the "minor edit bypass function" because this (or a withdrawn) RTAD form already obtained one or more approvals. This form will bypass documented approvers to avoid requesting re-approvals from documented approvers. The selection below indicates who still needs to either approve or re-approve.

If no approver needs to submit an approval, "no" should be selected to the question, "Does any approver need to re-approve or resubmit their approval?"

Submitters must not use this bypass function for [substantial edits](#).

Was this form sent back for minor edits? *

☒ Yes
☐ No

Does any approver need to re-approve or are there approvers who had not yet submitted their approval? *

☐ Yes
☐ No

This form may not progress until text is entered in the Minor Edit Report

Documented Previous Approvals

Approver Role *	Date Approved *
---	MM/DD/YYYY

+ Add Another Row

Minor Edit Report *

Sans Serif Normal B I S U A Normal

- If the **Faculty** must submit approval again, do not use the "minor edit" selection, click "No" to the question "was this form sent back for minor edits."
 - Please reference withdrawn case number(s) in the Minor Edit Report, if applicable.
- Employee Instructions:**
- Indicate Yes/No if the faculty member is a UCSD retiree
 - If Yes, search for the faculty member's name in the search box
 - If the name does not match what the faculty member wishes their name to appear as, enter No for the question, "Did the faculty's name appear as preferred?" Then, manually enter the preferred faculty member's name.

Employee Pre-Retirement Information			
UC San Diego retiree? * ☒ Yes ☐ No	Preferred Faculty Name (manual entry) *	Did the name display as preferred? * ☐ Yes ☒ No	Email
	Faculty Name * Q JDOE@UCSD.EDU		

- If Yes to UCSD retiree, then, enter Home Department
 - Best practice is to search using the prefix of the faculty's UCSD email address. For example: **JDOE** @ucsd.edu
 - Refer to the [Blink look-up tool](#)
 - Confirm the employee ID displayed correctly. If not, manually enter the ID number.

- If No, candidate is not a UCSD-Retiree, enter their name and email address, and Employee ID.
 - Enter Home UC Campus, Non-UCSD Location (ie General Campus or Health Sciences), Other UC's Home Department (type out its name)
 - Note, non-UCSD faculty members should have a concurrent [Intercampus Appointment Form](#) processed as has been standard practice.
 - The maximum of 43% percentage of effort restriction applies to all UC appointments summed together.
 - Indicate Retirement date
 - If the retirement date is in the future, indicate Yes to the future-dated question
 - If the retirement is future-dated, confirm that the faculty meets the Terms and Conditions specified in [APM 205-20a](#).
 - Indicate Pre-Retirement UC San Diego Location (ie GC, HS, SIO)
 - Indicate Yes/No if a Kualii Pathways to Retirement was prepared for this appointee
 - Indicate Yes/No if a Pathways to Retirement was created via the paper form
- GC/SIO Pre-retirement Information (*if retired from GC or SIO location*)**
- Indicate Yes or No to whether you will use pre-populated information from a previous Kualii RTAD submission
 - Enter the 4 digit document number of the last RTAD form for this same recall appointee. Or, search for the last form by entering the appointee's active directory name, eg **jdoe**. Choose the lowest doc number.
 - If all blanks show, confirm that that doc number is lowest, that the Proposed area is correct (HS/SIO/GC).
 - Title will not autocomplete at this time.
 - "Other" scale/date fields will display automatically even if not used on the last form.
 - Title: select the name of the title, eg Professor-AY
 - Title Code: this should be automatically populated
 - If not found, select XXXX-Other
 - Step: Provide step information (e.g. I, IX, AS)
 - Retirement Annual Salary: indicate the dollar amount the retiree had upon retirement
 - Scale Date: indicate the accurate scale date, be mindful of retirement dates and last scale used
 - If scale date is not listed, click "Other" and enter the date in the next space provided
 - Scale Type: indicate the appropriate scale type

- If old/outdated scale type, eg Minimum Scale for Professional Researchers, select “old/outdated” then enter a description.
- **Health Sciences Pre-retirement Information (*if retired from HS location*)**
 - Indicate Yes or No to whether you will use pre-populated information from a previous Quali RTAD submission
 - Enter the 4 digit document number of the last RTAD form for this same recall appointee. Or, search for the last form by entering the appointee’s last name.
 - Title will not autocomplete at this time.
 - “Other” scale/date fields will display automatically even if not used on the last form.
 - Title: select the name of the title, eg Professor-AY
 - Title Code: this should be automatically populated
 - Step: Provide step information (eg I, IX, AS)
 - Total Negotiated Salary: indicate the dollar amount the retiree had upon retirement
 - Scale Date: indicate the accurate scale date, be mindful of retirement dates and last scale used
 - If scale date is not listed, click Other and enter the date in the next space provided
 - Scale/APU: indicate the appropriate scale type
 - If old/outdated scale type, eg Minimum Scale for Professional Researchers, select “old/outdated” then enter a description.
- **Non-UCSD Retiree Pre-retirement Information (*if retired from other UC*)**
 - Indicate Yes or No to whether you will use pre-populated information from a previous Quali RTAD submission
 - Enter the 4 digit document number of the last RTAD form for this same recall appointee. Or, search for the last form by entering the appointee’s last name.
 - Title will not autocomplete at this time.
 - “Other” scale/date fields will display automatically even if not used on the last form.
 - Title: select the name of the title, eg Professor-AY
 - Title Code: this should be automatically populated
 - Step: Provide step information (eg I, IX, AS)
 - Retirement Annual Salary (if General Campus) or Total Negotiated Salary (if Health Sciences): indicate the dollar amount the retiree had upon retirement
 - Scale Date: indicate the accurate scale date, be mindful of retirement dates and last scale used
 - If scale date is not listed, click Other and enter the date in the next space provided
 - Scale Type (if GC) or Scale/APU (if HS): indicate the appropriate scale type

- **Note:** Because of Kualii access limitations, the original submitter will need to work directly with the retiree to submit approval on their behalf.
- **Note:** the 43% restriction applies to all UC appointment percentages of effort combined, see [Guidelines](#) and [APM 205-16.a](#).
- **Proposed Recall Appointment**
 - Proposed UCSD location: indicate GC, SIO or HS
 - Appointing Dept: indicate to appropriate department
 - If the recall appointment is a joint appointment, each location will submit their own individual RTAD form.
 - Note: Joint appointments combined % cannot exceed 43%, per [APM 205-16a](#)
 - SIO *only*: Indicate appropriate SIO Section, eg Earth, O&A, Biology
 - School: indicate the appropriate School
 - For HS, only select “Health Sciences-VCHS Academic Affairs”
 - Is an alternate approver needed? If the Department Chair/Head, Divisional Director, SIO Director, and/or Dean/AVC cannot serve in the role as approver, indicate the appropriate academic appointee who will serve in this role.
 - Best practice is to search using the prefix of the Chair/Dean/AVC’s UCSD email address. For example: **JDOE** @ucsd.edu
 - Refer to the [Blink look-up tool](#)
 - Dean/AVC will disappear if Teaching (Summer Session Program) is selected, this will be replaced by the Associate Dean of Undergraduate Education.
 - **New:** if the Appointing Department is actually a School itself, e.g. Jacobs School of Engineering, ensure that an academic is slotted in as the Dept Chair/Head. These roles are automatically populated with staff names because those staff serve in those roles in *other* Kualii forms.
 - Only academics may serve as approvers on a Kualii form.
 - Start Date: when will the recall appointment begin?
 - Start date must be 30 days after the retirement date.
 - If you attempt to input a date earlier than 30 days after the retirement date, Kualii Build will not allow the date to be input
 - End Date: when will the recall appointment end?
 - End date must not exceed 36 months from the start date.
 - If you attempt to input a date later than 36 months after the RTAD start date, Kualii Build will not allow the date to be input
 - Recall Purpose - indicate which responsibilities the appointee will have.
 - If the appointee will teach during Summer Session Program, select only “Teaching (Summer Session Program)” and no other recall purposes.
 - Summer Session Program RTADs should be handled as standalone requests due to Kualii’s routing and approval authority over Summer Session Program teaching.

- **If the appointee will teach during Summer months, but not in the Summer Session Program, select “Teaching.”**
- **Note:** For SIO, if Teaching is selected, the SIO Department Chair will also review these requests. Confirm if an alternate approver is needed if the SIO Chair is not available.
- If the appointee has an Administrative role, indicate Yes/No if this is a Faculty Administrator role (See [APM 246](#), eg College Provost, Assoc Dean, Vice Chancellor)
 - If Yes, select the role from the dropdown menu. If appropriate title is not listed, select “other” then manually enter the role.
- Description of Recall Duties: provide a short description of the duties the appointee will be performing in the recall appointment.
 - For teaching roles that do not have a set class for the appointee (e.g. clinical teaching), use this space to describe the teaching role.
 - For research roles
 - Answer Yes or No to whether the recall appointee holds a position at an organization outside the UC. If Yes, then follow up with the [RCI office](#) for further guidance.
- Does this recall appointment include measurable goals? Yes/No
 - Answer if this is a requirement for your department, consult local practices/procedures.
- Does this teaching and/or administrative recall exceed 6 years of cumulative recall service in teaching/administrative role? Indicate Yes/No
- Joint appointment: indicate Yes/No
- Fund Source(s): provide the project/task numbers that will fund this RTAD, if none or n/a, indicate as such. Writing n/a will make some questions disappear.
- Fund Source type: indicate core or non-core, both, or N/A
- How much external funding does the candidate have in place? Indicate the amount
- Confirm that there is sufficient non-core funding to support the RTAD
- How much indirect cost recovery will the individual generate?
- Is a space allocated (eg space/lab/office)?
 - If Yes, indicate where this will be
 - If Yes, indicate whether the unit has sufficient space to provision all of its in-service faculty including new hires.
 - If no and a non-office space is assigned, please provide an explanation.
 - If Yes, indicate what process/criteria were used to make the allocation
- Will graduate students/postdocs be supported?
 - If Yes, indicate how many
- Long term plans: For teaching and/or administrative roles, the area must provide a description of the department’s long term plans for the role.
 - Insufficient description of long term plans may result in the form being returned.

- If this admin/teaching recall is for a faculty who exceeded 6 years of service in such a role, you will need to answer two more questions:
 - Why is this function still being assigned to an RTAD appointee?
 - What is the long-term sustainability plan for this function?
- Teaching assignments: provide course information if applicable
- Indicate Yes/No if additional documents are needed.
 - Uploads are not required. Consult with your appointing department to know what documents are needed.
 - Uploaded documents' content does not replace required entries on the RTAD form. Please provide answers to the questions on the RTAD form and include "see attached" if further elaboration is necessary.
- **General Campus/SIO compensation (if GC or SIO appointment)**
 - Indicate if this is a variable percentage
 - If yes, confirm if the percentage exceeds 43%
 - Indicate the percentage range (or highest expected percentage rate, eg 43%)
 - Indicate % time (if not variable)
 - Indicate number with 0.1256 for 12.56%. If paid by-agreement only, indicate 0%.
 - Indicate Yes/No if paid by-agreement (for teaching/summer teaching only)
 - Indicate total by-agreement salary value
 - Indicate Yes/No if appointment is Non-Exempt (NEX).
 - If NEX, then input the range adjusted hourly rate. Refer to the latest [UCOP salary scales](#). Be careful which Scale date you'll use.
 - This will hide annual salary rate.
 - Annual Salary Rate: What is the range adjusted salary? (if applicable)
 - Even if % is 0% and the recall will be non-salaried, please still indicate the range-adjusted salary as well as the current salary scale
 - Range adjustment must follow [UCOP posted salary scale tables and percentage movements](#)
 - For recall academics who were in a represented position prior to retirement, upon retirement they will follow non-represented salary range adjustments.
 - Indicate whether there is an NIH salary cap
 - If Yes, indicate the effective start date of the salary cap, see the [NIH website](#), select from the dropdown menu
 - If another date is needed, or the most up to date values are not available on the Kuali form, select "Other." This will allow you to enter a new salary cap and corresponding date.
 - Select No if the proposed salary is less than the NIH cap, or the NIH cap does not apply.
 - Indicate the NIH salary cap, select from the dropdown menu

- Indicate the total salary based on NIH salary cap and the percentage of effort
 - If there is a difference between total compensation X percentage and NIH cap salary X percentage, the difference, if paid, would need to come from non-NIH sources.
- Total compensation: enter the range-adjusted salary reduced by the percentage of effort (and number of months if not a yearlong appointment)
 - If non-salaried, enter \$0.
 - Eg. \$100,000 range adjusted with a 12.56% percentage for a 10 month appointment comes to \$10,466.67/year
 - $[\$100,000 * 0.1256 * (10/12)] = 10466.67$
 - Eg. \$250,400 range adjusted with a 43% percentage for a 12 month appointment comes to \$107,672/year
 - $[\$250,400 * 0.43 * (12/12)] = 107,672$
 - Eg. \$150,000 range adjusted with a 0% percentage for a 12 month appointment comes to \$0/year
 - $[\$150,000 * 0.00 * (12/12)] = 0$
 - Eg. \$175,000 range adjusted with a 43% percentage for a 36 month appointment comes to \$75,250/year
 - $[\$175,000 * 0.43 * (12/12)] = \$75,250$
 - Note, you need not range adjust future years on multi-year appointments, information on future scales is not available
 - Note, this total compensation must also include by-agreement teaching payment, if applicable.
- If applicable, Administrative Compensation
 - Input the amount that the Administrative role will be compensated for
- Title Code: [indicate the appropriate code](#)
- **HS compensation (if HS appointment)**
 - Indicate if this is a variable percentage
 - If yes, confirm if the percentage exceeds 43%
 - Indicate the percentage range
 - Indicate % time (if not variable)
 - Indicate number with 0.1256 for 12.56%
 - If by-agreement teaching only, write 0%
 - Indicate Yes/No if appointment is Non-Exempt (NEX).
 - If NEX, then input the range adjusted hourly rate. Refer to the latest [UCOP salary scales](#). Be careful which Scale date you'll use.
 - Indicate Yes/No if teaching will be paid via by-agreement payment (teaching/summer teaching only)
 - Covered compensation: enter the range-adjusted salary (X, X')
 - Even if % is 0% and the recall will be non-salaried, please still indicate the range-adjusted salary as well as the current salary scale

- Range adjustment must follow [UCOP posted salary scale tables and percentage movements](#)
 - For recall academics who were in a represented position prior to retirement, upon retirement they will follow non-represented salary range adjustments.
 - Indicate whether there is an NIH salary cap
 - If Yes, indicate the effective start date of the salary cap, see the [NIH website](#), choose from the drop down menu
 - Select No if the base salary is less than the NIH cap, or NIH cap does not apply.
 - Indicate the NIH salary cap, choose from the drop down menu
 - Indicate the total salary based on NIH salary cap and the percentage of effort. If there is a difference between Total Negotiated Salary X percentage and NIH salary cap X percentage, any amount of this difference to be paid out to the appointee would need to come from non-NIH sources.
 - If another date is needed, or the most up to date values are not available on the Kuali form, select "Other." This will allow you to enter a new salary cap and corresponding date.
 - Requested Negotiated Salary
 - If non-salaried, enter \$0.
 - Eg. \$100,000 range adjusted with a 12.56% percentage for a 10 month appointment comes to \$10,466.67/year
 - $[\$100,000 * 0.1256 * (10/12)] = 10466.67$
 - Eg. \$250,400 range adjusted with a 43% percentage for a 12 month appointment comes to \$107,672/year
 - $[\$250,400 * 0.43 * (12/12)] = 107,672$
 - Eg. \$150,000 range adjusted with a 0% percentage for a 12 month appointment comes to \$0/year
 - $[\$150,000 * 0.00 * (12/12)] = 0$
 - Eg. \$175,000 range adjusted with a 43% percentage for a 36 month appointment comes to \$75,250/year
 - $[\$175,000 * 0.43 * (12/12)] = \$75,250$
 - Note, you need not range adjust future years on multi-year appointments, information on future scales is not available
 - Requested salary must also include by-agreement salary components, if applicable.
 - If applicable, Administrative Compensation
 - Input the amount that the Administrative role will be compensated for
 - HS Title Code: [if w/ HSCP membership, indicate](#)
 - If non-HSCP, indicate the appropriate code
- EVC Exceptional Request (if applicable)**

- Indicate if an exception to policy is being requested (excluding >43% effort), eg non-salaried teaching
- If there will be an exception, fill out the first page of the [exception analysis form](#) and provide the Department Chair memo with justification of the exception request.
 - *Greater than 3 years of cumulative recall service is not an exceptional request per the updated [Academic Recall Guidelines](#), as of 10/1/2023.*
- **Chancellor Exceptional Request (if applicable)**
 - For requests for percentages greater than 43%, the department will need to provide a memo addressed to the Chancellor.
- After you submit your RTAD form, you will receive an email from Kualu with information about the submission and where to check on the submission's current status.

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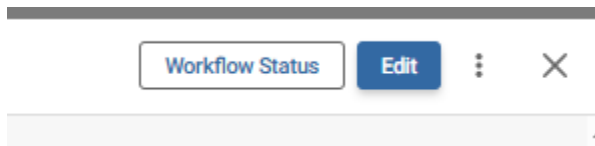
Submission Reviewer Process (if applicable)

- Review all entries made by the original submitter.
- The Submission Reviewer can make edits to all sections of the RTAD form.
 - For best practice, communicate to the original submitter what changes needed to be made. These changes need not be entered in the "minor edit report" because the next reviewer, the faculty, will see it for the first time
 - If the submission reviewer makes an edit to a form *after* the form had been routed to the faculty member, then minor edits must be documented in the minor edit report box.

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Dean AP Reviewer Guide

- **Minor Edit bypass:** If a form is received in your office after having the Minor Edit function applied, double-check that all signatures are present. If signatures do not show (they can get overwritten if minor edit is used), check the Workflow Status in the upper right side.



To Dean AP Reviewers
Submitters/Submission Reviewers are using the "minor edit bypass function" because this (or a withdrawn) RTAD form already obtained one or more approvals. This form will bypass documented approvers to avoid requesting re-approvals from documented approvers. The selection below indicates who still needs to either approve or re-approve.

If no approver needs to submit an approval, "no" should be selected to the question, "Does any approver need to re-approve or resubmit their approval?"

Submitters must not use this bypass function for **substantial edits**.

Was this form sent back for minor edits? ***** **?**

☒ Yes
☐ No

Does any approver need to re-approve or are there approvers who had not yet submitted their approval? ***** **?**

☐ Yes
☐ No

This form may not progress until text is entered in the Minor Edit Report

Documented Previous Approvals **?**

Approver Role *	Date Approved *	
---	MM/DD/YYYY	

+ Add Another Row

Minor Edit Report ***** **?**

Sans Serif ***** Normal ***** **B** **I** **U** **A** **||** **||** **||** Normal ***** **I_x**

- If missing, enter in the approval role and date approved in the “documented previous approvals” box and a brief summary of the changes the form needed to have in the “minor edit report” box.
- Review all entries made by the original submitter and submission reviewer (if applicable)
- Confirm - Pre-retirement information
- **NEW:** Dean AP can make changes to **pre-retirement question** responses. You can note changes in the Minor Edit Report.
 - Retirement Date
 - Employee ID displays correctly
 - Title
 - Step
 - Retirement Annual Salary/Total Negotiated Salary
 - Scale Date (**be mindful of 10/1, 7/1 or other dates**)
 - Scale Type/APU (**be mindful of B/E/E or other**)

- Non-UCSD retiree
 - If non-UCSD retiree, is there an [Intercampus Appointment Form](#) in process?
 - Note: For non-UCSD retirees, Original submitters will submit approval on their behalf due to Kuali access limitations.
- Confirm - Proposed Recall Appointment
 - Proposed location
 - Appointing Department
 - SIO Section (SIO only)
 - School
 - Alternate approvers are appropriate, if applicable
 - Start Date
 - End Date
 - Recall Purpose
 - If recall duties include Research, check on if the recalled faculty concurrently holds a position at an organization outside the UC. If yes, seek guidance with the RCI office.
 - Description of Recall Duties
 - Measurable Goals (if applicable)
 - Whether admin/teaching role has exceeded 6 years
 - Joint appointment (if applicable) - confirm if other department has started/routed theirs - joint RTADs must be submitted by each appointing department.
 - Combined together, Joint RTADs' % cannot exceed 43%
 - Fund Source
 - Fund Source Type (if applicable)
 - How much external funding
 - Sufficient non-core funding
 - Indirect cost recovery
 - Space allocated to support individuals
 - Is location provided if Yes?
 - If a space is allocated, is the non-office space question answered?
 - If "no" to the non-office question is indicated, is there an explanation?
 - Is the process/criteria on how the allocation was determined described adequately?
 - Grad students/postdocs
 - Is the number accurate?
 - Teaching/Administrative duties
 - Are the long-term plans for the role(s) adequately clarified? If no explanation is provided, APS will return for additional information.
 - If greater than 6 years in a teaching/admin role
 - Why is this function still being assigned to an RTAD appointee?
 - What is the long-term sustainability plan for this function?

- Teaching assignment (if applicable)
 - Are the courses in the appropriate quarter, # listed accurately, and titled appropriately?
- Confirm - GC/SIO/HS Compensation
 - Variable Percentage?
 - Does it exceed 43%?
 - Percent time is expressed appropriately?
 - Is NEX? If so, confirm the right hourly rate.
 - Annual Salary/Covered Compensation (X, X')
 - Is it ranged appropriately? (Even if 0%, current salary should be expressed appropriately as a range adjusted value from the retirement salary)
 - Scale Date
 - Total Compensation/Requested Negotiated Salary - calculated correctly?
 - Title Code
- Confirm - EVC Exceptional Request (if applicable)
 - Confirm Dept memo/analysis is accurate and complete
 - Provide the Dean's endorsement/justification memo in the applicable section.
- Confirm - Chancellor Exceptional Request (if applicable)
 - Confirm Chancellor Memo is correct
- Confirm - Faculty Signature, Dept Chair Signature are input/affixed
 - If faculty/chair/Dean/AVC are not present but the form did get approval, their signatures were overwritten because the form was sent back for edits.
 - If the submitter/submission reviewer had not already, please write "faculty, chair and Dean approved form" in the Minor Edit Report.
 - These approvals can be verified by clicking the toggle on the View "Review/Status" button located here in the upper left of the form (top of the page).

0659
Submitted May 9, 2024 · 1'

View

Review ☒ Status

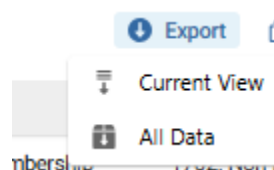
- Once review is finished, mark select "Mark Complete," enter comments if needed, then click "Complete."
 - Do not put in "minor edit report" comments in this box. Minor edit comments go in the **Minor Edit Report** box.

- **Best Practice:** download Outcome Letter and final/approved RTAD form for your archives.
- **NEW:** Dean AP/VC analysts have visibility of all submissions in their School/area: <https://ucsd.kualibuild.com/document-list/6340a178f37d0325968fe933>.
 - Columns may be changed based on data points desired.
 - Select “columns,” then search the data point you need to find. Common ones include “CompTitleSIOGC” or “HSCompTitleCode” or “HSCompTitleCodeNonHSCP.” Use “cntrl + f” to open a search window and type in the desired data point



	GO	Sort (2)	Columns	Views	Filter
Submitted At			META_DATA		
Submitter			META_DATA		
Workflow Status			META_DATA		
FacultyName			SUBMISSION_DATA		

- Click the eye to show the column in your list. Drag the 6 dots to the left to re-order the list. If a column is very low in the list it'll show at the bottom, you'll need to drag it up to make it appear before earlier listed columns.
- Click the eye again to hide the column in your list.
- Click “Export” to download a CSV file containing the data you have access provided for



- Feel free to contact nsericks@ucsd.edu if you cannot find the data point you would like to include in your document list.

AP Data Process Guide

As of **October 1, 2026**, standard RTADs are delegated to Dean level review. Dean AP will enter dean authority AP Data entries for each Recall appointment using the following step-by-step guide. Exceptional and EVC authority or higher Recall appointments will be reviewed after Dean approval; these exceptional and higher level approval RTADs will be entered in AP Data by APS.

No Appointment Summary is needed given no Interfolio file is being prepared. Select “Add Action” on the “Review History” tab. Here is a step-by-step guide for all data points:

- Review Year: Select the review year for when this Recall Appointment occurs. For example, a 10/1/26 appointment start would be AY26-27; a 6/1/27 file would still be AY26-27. A 7/1/27 file would be AY27-28.
- Begin date: enter first date of RTAD appointment
- End date: enter last date of RTAD appointment
- File Number: Select “1” unless there have been multiple actions within the same academic year
- Title: enter recall job code (1701, 1702, etc.)
- Step: Enter Step last achieved upon retirement
- Appointment: Select “A” or other letter if submitting a subsequent appointment.
- Appointing Department: Select name of appointing department for RTAD
- Action is “Appointment”
- Primary Appointment: “Yes”
- Authority “Dean”
 - If EVC authority, APS will enter the AP data entry.
- Salary Type: “Annual”
- Percentage: enter percentage listed on recall form, if variable enter highest value
- Percentage type: Enter “variable” if mentioned “up to 43%” or “variable %”
- Skip Market OS + BOS
- Scale Date: select salary scale on RTAD form
- De-select “from scale,” manually enter annual salary rate.
- Click “Save”

Current file actions

View / Edit	Review year	Action	Begin date	End date	Department	Title / Rank	Step	%	Total salary	Scale date	Status	View details	Delete action
	2026-2027	APPOINTMENT	7/1/2026	6/30/2027	CELL & DEVELOPMENTAL BIOLOGY	001701 - RECALL HCOMP	5	43	\$120,000	10/1/2025			

Final action

File routing

The action now appears in the “current file actions.”

- Click the blue bars under “view details”
- Click “initialize final action”
- Update action information
 - Status: “final”
 - Result: “approved”
 - Outcome letter date: date recall was approved by Dean
 - Outcome released: same as above, or skip

Click “save”

- New RTAD appointment will now show in AP Status.

If the appointment must change after approval, e.g. new percentage of effort, or changed start/end date, make changes to the AP Status page only.

If the appointment must be withdrawn and will not occur, go to the Review History tab and click on the RTAD appointment. Change “Status” from “final” to “withdrawn.”

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Minor Edit Routing - Submitter/Submission Reviewer

- **Only use the minor edit function if approvers have already seen the form and some or all approvers can be skipped.**
 - The Submission Reviewer can make changes to the whole form (before faculty views the form) without needing to send back the form to the original submitter.
- Make minor edits where needed by changing field values.
- Enter in “previous documented approvals” this should at least have faculty, dept chair, and dean/avc. Enter a brief summary of changes made in the “minor edit report.”
- Submitting the form again at this point will skip all notifications/approval requests to the faculty, Chair, Dean/AVC, unless Chair and/or Dean/AVC are marked as requiring re-approval (or haven’t yet approved).
 - **Note for Summer Session Program Teaching:** If the form must be re-submitted after a minor edit, select “Chair only.” (SIO can also select Div Director)
- Should the form need substantive edits, the faculty, Chair, Dean/AVC will need to review the RTAD again, do not use the minor edit routing function when **substantial edits** were made.

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Minor Edit Routing - Dean AP

- If the form requires minor edits, please send back the form to the original submitter or submission reviewer.
- **NEW:** Dean AP can make minor edits to pre-retirement question responses. Be sure to note changes in the Minor Edit Report
- Upon receipt, confirm that edits are implemented and the “documented previous approvals” and a brief summary of changes is in the “minor edit report.”
- If edits were needed on the EVC/Chancellor exception analysis form, this would not normally be viewable by the faculty member, therefore utilize the minor edit routing to skip the faculty and department chair’s approval/notifications.
- If substantive edits were needed, e.g. negotiated salary, duties, etc., the form will need re-approval by both the faculty member and the department chair and Dean/AVC again.
- **Summer Session Program requests will not route to the School's Dean AP office.** After receiving Department Chair approval, Summer Session Program Dean AP officers will review the Summer Session Program RTAD submission.

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To Dean AP Reviewers
Submitters/Submission Reviewers are using the "minor edit bypass function" because this (or a withdrawn) RTAD form already obtained one or more approvals. This form will bypass documented approvers to avoid requesting re-approvals from documented approvers. The selection below indicates who still needs to either approve or re-approve.

If no approver needs to submit an approval, "no" should be selected to the question, "Does any approver need to re-approve or resubmit their approval?"

Submitters must not use this bypass function for [substantial edits](#).

Was this form sent back for minor edits? ?

☒ Yes
☐ No

Does any approver need to re-approve or are there approvers who had not yet submitted their approval? ?

☐ Yes
☐ No

This form may not progress until text is entered in the Minor Edit Report

Documented Previous Approvals ?

Approver Role *	Date Approved *
---	MM/DD/YYYY

+ Add Another Row

Minor Edit Report ?

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New Features added/fixes to Kualii RTAD after initial launch

If you submitted an RTAD form early in the pilot period, here are a few features that your form may be missing when compared to a newly started form. (Note you can withdraw an existing form, duplicate and re-submit it to take advantage of these features)

- Bypass feature - If minor edits are needed, Faculty and Dept Chair approvals/notifications can be skipped

- Bypass feature - If minor edits are needed, Dean/AVC approvals/notifications can be skipped
- Bypass feature - Submitter/Submission Reviewers can indicate who needs to re(submit) their approval, e.g. Chair & Dean, Chair only, Dean only, or none (i.e. bypass all approvers if approval was already granted). - 12/8/2023
- Submission Reviewer - If the original submitter would like another staff person to review the submission before it reaches the faculty, they may indicate the person.
- Workflow status - viewable for original submitters/APS only
- Dept Memo/Exception Analysis form uploads for Dept Submitters and Dean AP offices for EVC exceptions
- [Emeritus/Emerita title code guidance](#)
- Designate an alternate approver for Department Head/Chair and/or Dean/AVC
- Variable percentage entry
- Clarification on proposed salary/compensation (especially toward 0% appointments)
- New section for non-UCSD retiree home location information - 12/8/2023
- Submitters can upload additional candidate documents (not required) - 12/13/2023
- Clarification on faculty/chair/Dean/AVC look-up, prefer active directory entry - 1/8/2024
- Summer Session Program RTADs can now be handled by the system. - 1/19/2024
- Clarification of the "minor edit" bypass function. - 1/19/2024
- Additional questions related to space assignments - 1/22/2024
- Answer to question on how to handle revised start/end dates on approved Kuali RTADs - 1/24/2024
- Clarification on faculty workflow/approval process for non-UCSD retirees 1/29/2024
- Clarification on submission deadlines for RTADs received via Kuali by APS (standard/non-standard) - 1/31/2024
- Added selections to account for NIH salary cap - 1/31/2024
- Inclusion of Non-Senate Teaching Only TC 1699 (eg Retired Unit 18) - 2/12/2024
- Dean AP can make edits to pre-retirement question responses and Minor Edit Report - 2/14/2024.
- Improved Minor Edit Bypass questions 2/21/2024
- Implemented SIO Routing to include Divisional Director, SIO Chair, and SIO Director 2/21/2024
- Added automated Title/Title Code lookup (multiple can be selected) 2/21/2024
- Case #s will now appear in email notifications to Submitters and Dean AP 2/23/2024
- Clarifying questions for teaching/admin recalls that exceed 6 years 2/26/2024
- Clarifying "additional document" sub-section 2/27/2024.
- Submitters get "submission notification" giving a short overview of their submission and reminder on where to look to see current status of the form - 3/13/2024.
- Administrative roles will need to have the amount paid for the Administrative role written out separately. - 3/13/2024
- Elimination of Rank and Basis questions for GC, SIO and non-UCSD retiree pre-retirement sections. Rank and Basis information is automatically provided with the title code lookup tool. -3/27/2024
- Questions and information optimized for using Dark Mode - 3/27/2024

- Added functionality to manually enter the faculty member's preferred name - 4/5/2024
- Clarified scenario where form gets sent back to submitter and no edits were actually needed but approvals had already been received. - 5/6/2024
- Added failsafe to prevent recalled appointees from submitting their own forms - 5/10/2024
- Clarified how to handle "overwritten signatures" and what submitter/submission reviewer/Dean AP should write in the Minor Edit Report. - 5/14/2024
- Note on new emeriti (never been recalled) having the new requirement for an I-9 in UCPATH - 5/21/2024
- Added link and explanation for handling "Pathways to Retirement" submissions - 6/4/2024
- Standardized email notifications will display as "Kuali RTAD Notification" or "Kuali RTAD Task" for high volume recipients (ie submitters, Dean AP, APS) - 6/4/2024
- Added instructions for when a School (i.e. Jacobs School of Engineering, Social Sciences or Arts & Humanities, excl. Rady/GPS/Skaggs, etc.) serves as the "appointing department." 6/20/2024
- Cleaned up Form header to include Name, Title Code, appointing Dept, Start/End Date, Doc Number. 7/11/2024
- Added clarification for Specialized Programs where the appointing department is the School and who should serve as Chair/Dean. 7/22/2024
- Added feature for "role accounts" to receive approval notifications. 7/26/2024
- Updated Action Sequence with clarified Action Key - 8/22/2024
- Added option to pre-populate pre-retirement data from a previously submitted form - 9/11/2024
- Clarification on workflow errors, fix to the three year cumulative example, various description updates - 10/11/2024
- Added answer validation for certain scenarios to stop forms from being advanced until errors are resolved - 11/20/2024.
- Added decision tree to explain appropriate job code proposals - 12/11/2024
- Added explanation for a scenario for when an approved teaching RTAD must be cancelled after the RTAD was approved - 12/13/2024
- Added guidance on entering by-agreement payments for teaching recalls. -1/24/2025
- Submitters can now suppress notifications of approvals. Submitters can still navigate to their documents list to see where a form is in the process - 2/27/2025
- Send back comments now will display in an email sent to the recipient - 2/27/2025
- Added SIO Section Head to workflow - 3/19/2025
- Added options to indicate NEX hourly salary - 5/29/2025
- Added option to indicate measurable goal, if applicable by department practice - 5/29/2025
- Enabled option for APS/Dean AP to make changes to minor edit bypass routing - 7/2/2025
- Separated box for "Documented Previous Approvals" and "Minor Edit Report" to standardize use and content of responses. 7/10/2025

- Kuali RTAD form will not allow RTAD start date to be earlier than 30 days after retirement date. The form will automatically delete incompatible dates - 8/14/2025
- Added option to use "other" duty when paying on BYA basis (not to be confused with "additional pay" in UCPATH - 9/30/25
- Added clarification toward "variable percentage," as the "highest expected variable percentage" - 11/19/25
- Re-work of NIH CAP interaction with total compensation/negotiated salary. NIH CAP values will show from a dropdown. NIH CAP salary will need to be multiplied against the percentage, this will show alongside the total compensation/negotiated salary multiplied by the percentage. Any difference (that will be paid to the appointee) where the total compensation is higher than NIH capped salary would need to be sourced from non-NIH sources, if applicable. 11/19/25
- Added visibility on the Document List page for Submitters, Submission Reviewers, and Dean/VC AP analysts 12/5/25.
<https://ucsd.kualibuild.com/document-list/6340a178f37d0325968fe933>
- Updated Summer Session Teaching Routing to include UE-staff review and Assoc Dean -UE approval 1/27/26
- Added dropdown menu for specific Faculty Administrator Role - 3/3/26
- Updated Kuali form for new NIH caps and provided guidance in case Kuali form NIH caps are out of date, i.e. use "other" for manual entry - 3/3/26
- Moved Additional Documents to be added to the case out of "pre-retirement" information to Proposed Recall appointment section. - 3/20/26
- Added conditional question with accompanying notification, if applicable, for recall appointees who have a research duty. Submitters must check if the appointee holds a position at an organization outside the UC. If Yes, the submitter is recommended to seek guidance with the RCI office - 3/20/26
- Added guidance for calculating range adjusted salary for recall appointees who were retired in represented titles (e.g. Researcher, Unit 18 lecturer). - 3/20/26
- Due to Kuali software update, withdrawn forms can now be edited and re-submitted - 6/25/26
- Added guidance for 1699s as to what salary point to use if the former Unit 18 lecturer held appointments at two different departments and their salary point was different in each department. - 7/22/26
- Substantial overhaul to workflow to support new delegation of Dean approving standard recalls. - 10/7/26
- Exceptional and higher level approval will continue to require EVC approval. - 10/6/26
- Changed "role account" gadget to "addl email" gadget to accommodate multiple recipients. - 10/7/26
- Changed format of RTAD form due to Kuali gadget visibility issues. - 10/7/26
- Added AP Data entry guide for Dean authority RTADs. - 10/7/26

Is there a feature/improvement/fix you think we should consider? Please send a message to Nick Erickson at nsericks@ucsd.edu.

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