

## Pre-approval for Essential Travel During the COVID 19 Pandemic: Case Creation Process

Academic appointees must contact their departmental Academic Personnel staff when they need to submit a request for pre-approval for essential travel during the COVID 19 pandemic. Interfolio will be used to facilitate the routing and approval of these request. A special template has been set up for this process. **Due to the sensitive nature of these requests, following submission, approval will be provided as soon as possible.**

**Policy reference:** <http://adminrecords.ucsd.edu/PPM/DOCS/1-1.html>

To create a case for pre-approval for essential travel during the COVID 19 pandemic, follow the steps below.

1. Login to Interfolio at [review.ucsd.edu](http://review.ucsd.edu)
2. Click on “Cases” in the left-hand navigation menu on the left hand side of the screen.
3. Click on the “Create Case” button.
4. Select home department or ORU for the academic appointee who is requesting pre-approval.
5. Choose the “Pre-Approval Process For Essential Travel During the COVID-19 Pandemic” template by clicking on the template name.
  - i. **Note:** Unlike the other templates created for your department, this template is not department specific

<b>Pre-Approval Process For Essential Travel During the COVID-19 Pandemic</b>	University of California-San Diego	Other	No	Options ▼
Use if an academic appointee is requesting essential travel during the COVID-19 pandemic.				

6. Search for a Candidate or enter their name and email address
  - If you are unable to find the academic appointee after searching, please email Julia Partridge at [jkpartridge@ucsd.edu](mailto:jkpartridge@ucsd.edu). Mark your message as urgent and include in the subject line: Add academic for pre-approval for essential travel.
7. Select “Yes” to the question “Will the candidate be involved in this evaluation?”
8. Scroll down and click the “Save & Continue” button.
9. On the candidate requirements page, scroll down and click the “Continue” button.
10. On the internal case sections page, scroll down and click the “Continue” button.
11. Click “Continue”.
12. On the Case Review Steps page, click on the edit hyperlink on the first step of the workflow, “Department Chair Review”
  - i. **Note:** The pre-existing Department Chair Standing Committee is a placeholder and you will not be able to add individuals to it.

## Case Review Steps

[+ Add Step](#)

[Additional Options](#) ▾

1 Department Chair Review

[Edit](#) | [Delete](#)



Department Chair (0)

⊖ No Instructions ⊖ No Required Documents

13. Click the “Add Committee” button.

## Edit Details

### Step Details (Step 1 of 3)

**Step Name**

Department Chair Review

**Due Date**

—

[Edit Step Details](#)

**18** people can administer the case at this step.

**0** administrators are recused at this step.

[Manage](#)

### Reviewers

[+ Add Committee](#)

▾ **Department Chair**

Standing Committee (0)

[Options](#) ▾

[Manage Members](#) [Instructions](#) [Required Documents](#) [Required Forms](#) [Settings](#)

No Members

[Add Members](#)

[Return to Case Review Steps](#)

14. Click on “Individual User” then search for your department chair’s name, select, and click the “Add” button.

15. Delete the pre-existing Department Chair Standing Committee by clicking options and selecting remove. Click the “Yes” button the confirmation pop-up window.

16. If you want to get notifications that the academic appointee has submitted their request form, follow steps 13-14 to add yourself as an additional individual user committee.

17. Click on the required forms tab within the newly added individual committee that shows your department chair’s name. Then, click the “Add Required Form” button.

18. Select “Department Chair Travel Endorsement” in the form name field, “Endorsements & Approvals” in the Internal Section for Response field, and “Administrators & Entire Committee” in the response visibility field. Then, click the “Add Form” button.

▼ **Brandy Cheshire** Options ▼  
 Individual User (1)

[Instructions](#) [Required Documents](#) [Required Forms](#) [Settings](#)

Add required Committee Forms to be completed as part of the work for this committee. All forms must be completed or bypassed by an Administrator before the case can advance to the next step.

**Add Committee Form**

**Form Name \***

Department Chair Travel Endorsement ▼

**Internal Section for Responses \***

Endorsements & Approval ▼

**Response Visibility \***

Administrators & Entire Committee ▼

**Who submits the form? \***

Brandy Cheshire

+ Add Form
Cancel

19. Once that has been completed, click the “Return to Case Review Steps” button on the bottom of the page.
20. On the Case Review Steps page, click on the “Edit” hyperlink on the second step of the workflow, “Dean Review”
  - **Note:** The pre-existing Dean Standing Committee is a placeholder and you will not be able to add individuals to it.
21. Click the “Add Committee” button.
22. Click on “Individual User” then search for your Dean’s name, select, and click the “Add” button.
23. Delete the pre-existing Dean Standing Committee by clicking options and selecting remove. Click the “Yes” button the confirmation pop-up window.
24. Add your dean’s AP staff committee by repeating steps 20 and 21. Instead of selecting “Individual User”, select “Standing Committee” and select the appropriate dean’s AP staff committee.
25. Click on the required forms tab within the newly added individual committee that shows your dean’s name. Then, click the “Add Required Form” button.
26. Select “Dean Essential Travel Pre-approval endorsement” in the form name field, “Endorsements & Approvals” in the Internal Section for Response field, and “Administrators & Entire Committee” in the response visibility field. Then, click the “Add Form” button.

▼ **Brandy Cheshire** Options ▼  
 Individual User (1)

[Instructions](#) [Required Documents](#) [Required Forms](#) [Settings](#)

Add required Committee Forms to be completed as part of the work for this committee. All forms must be completed or bypassed by an Administrator before the case can advance to the next step.

**Add Committee Form**

**Form Name \***

Department Chair Travel Endorsement ▼

**Internal Section for Responses \***

Endorsements & Approval ▼

**Response Visibility \***

Administrators & Entire Committee ▼

**Who submits the form? \***

Brandy Cheshire

+ Add Form
Cancel

27. Once that has been completed, click the “Return to Case Review steps” button on the bottom of the page.
28. Complete the case creation process by clicking the “Continue” button at the bottom of the screen.
29. Return to the newly created case and notify the candidate by clicking the “Send Case” button and clicking “Notify Candidate”.

After the candidate submits their form, your Department Chair will receive an automated email from Interfolio alerting them that a form for the academic appointee is pending their review. **Your department chair MUST complete their review of the request in Interfolio and must complete the endorsement form.** No one may submit the endorsement form on their behalf.

After Departmental Chair review, the form will be routed to your divisional dean for review. The dean will review the request and submit to APS for EVC review and approval.