

Tips on Annual Certification Processing (for APM 025 Approvers)

Basics

- **Compliance with APM 025:** Faculty are responsible for submitting annual reports of all Category I and II outside professional activities (OPA) by 11/1.
- **Pending Approval Forms:** Faculty will not be able to complete the annual certification *until all* prior-approval forms (e.g., Category I) have been approved.

Getting Started

1. **Log into OATS:** Log into OATS using your e-mail address as your user name and your password. You can log in to the UC OATS website by visiting the following link: <https://ucsd.ucoats.org>

Reviewing Annual Certification Forms

2. **Use the arrow buttons** to navigate to the fiscal year reporting period for which you are approving annual certifications. Then **click the ANNUAL CERTIFICATIONS tab.**

Note: if you don't see the screen above, you may be in the Faculty view. Click on the blue **Approver's View** button to see the Approver View.

3. Once you are in the Annual Certification screen, you can use the radio buttons to select filtered views of annual certification forms:

- Not Submitted: *Waiting for faculty to certify*
- In queue (with no activities): *Pending your approval – no OPA*
- In queue (with activities): *Pending your approval – with OPA*
- In process: *Pending submission or review by department reviewer*
- Accepted: *Approved by Chair/Director*

4. To review and approve forms in your queue with no activity, **select the “In queue (With No Activities)” radio button.** You can *bulk* approve all forms from faculty who did not engage in any outside professional activity. **Check the box in the header row** to select all forms and **click the “Sign rows that are checked” button.** This will approve all the annual certification forms that were checked.

UID	Faculty	Department	Signed Date	# Activities	Total Hours	Total Earnings	Due To Plan	Actions
<input type="checkbox"/>	88888876 Lin, Maya	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approve
<input type="checkbox"/>	88888875 Novello, Antonia	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approve
<input type="checkbox"/>	88888857 Sak, Jonas	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approve
<input type="checkbox"/>	88888881 Stanton, Elizabeth	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approve
<input type="checkbox"/>	88888883 Wu, Chien-Shung	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approve

5. To review annual certification forms with activities, **select “In queue (With Activities).”** Then **click the Annual Certification button** to review an *individual* faculty report. Click [here](#) for more detailed instructions on how to approve annual certifications. if you have any questions, send an e-mail to: esr-oats@ucsd.edu

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