Tips on Annual Certification Processing (for APM 025 Approvers)



Basics

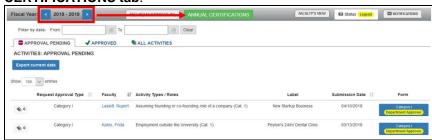
- **Compliance with APM 025:** Faculty are responsible for submitting annual reports of all Category I and II outside professional activities (OPA) by 11/1.
- **Pending Approval Forms:** Faculty will <u>not</u> be able to complete the annual certification *until all* prior-approval forms (e.g., Category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

FACULTY: ANNUAL CERTIFICATIONS Filter forms: Olio Submitted Olin queue (With No Activities) Olin queue (With Activities) Olin process OAccepted

- 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 <u>not</u> 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 III	Faculty	Là Department	IT Signed Date	# Activities	Total Hours	Total Earnings	Due To Plan	Actions
	888888876	Lin, Maya	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approver
	888888875	Novello, Antonia	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approver
	88888857	Salk, Jonas	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approver
	888888881	Stanton, Elizabeth	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approver
	88888883	Wu, Chien-Shiung	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approver
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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 <u>here</u> 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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888888875	Novello, Antonia	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approver
888888857	Salk, Jonas	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Approver