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](https://ucsd.ucoats.org)

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.

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.

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](https://ucsd.ucoats.org) for more detailed instructions on how to approve annual certifications. If you have any questions, send an e-mail to: esr-oats@ucsd.edu

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.