

# Academic Personnel Data Management System

## Department Staff User Manual

Academic Personnel Services

Updated June 2017

# Table of Contents

<b>Accessing AP Data</b> .....	<b>4</b>
<b>Assignment of roles in AP Data</b> .....	<b>4</b>
<b>How to get more help with AP Data</b> .....	<b>5</b>
<b>Academic Employee Report Tool</b> .....	<b>5</b>
Creating ad-hoc reports .....	6
Generating canned reports.....	8
Available canned reports .....	8
Probationary Period Reports .....	9
<b>Replacement AP Queries</b> .....	<b>10</b>
File Routing Status- replaces the Academic Personnel File Tracking Query .....	10
Next Review Due Report: replaces the Academic Personnel Next Review Due Query .....	11
Academic Appointee’s History Report- replaces the Academic Personnel History Query.....	12
Leave and Service Modification History: replaces the Academic Personnel Leaves and Duty Modification Query .....	13
<b>Employee Record Data Screen</b> .....	<b>14</b>
Navigating to the Employee Record Data Screen .....	15
Option 1 .....	15
Option 2 .....	16
Option 3 .....	16
Personal Information Section .....	17
Home Department Section .....	18
Current Appointment Section.....	19
Degree/Prior Service Section .....	19
Career Milestones Section .....	20
Probationary Period Section .....	20
Separation Section .....	21
<b>Review History Data Screen</b> .....	<b>22</b>
Current file actions.....	23
File & Appointment Section .....	23
Action Section .....	24
Salary Section.....	25
Vote Section .....	26
Publication Section.....	27

Routing Records .....	27
Review Outcome History .....	28
<b>Unit 18 Data Screen .....</b>	<b>30</b>
Mentoring meeting status data entry.....	30
Non-reappointment reason disposition data entry.....	32
<b>AP Status Data screen .....</b>	<b>33</b>
<b>Leaves &amp; Service Modification Screen.....</b>	<b>34</b>
Leave or Service Modification Records.....	35
Sabbatical/Administrative/Leave in Lieu Credit Records.....	37
<b>Appendix A: File Actions.....</b>	<b>38</b>

## Accessing AP Data

In order to access *AP Data*, you must be registered for UCSD's Single Sign-On (SSO), UCSD's authentication system for campus business systems. If you are not yet registered, instructions for registering are available on Blink at: <http://blink.ucsd.edu/technology/network/access/business-systems/access.html>

You also need to be assigned a "role" in AP On-line *Review* (see below), which tasks you can perform and which screens you can see.

Once you are registered for Single Sign-On and have been assigned a role, you may access the application by clicking the AP Data tab in APOL Review or directly at the following link:

<https://academicaffairs.ucsd.edu/Modules/APS/Admin/Input.aspx>

Training materials and video tutorials can be found at <https://academicaffairs.ucsd.edu/aps/apol/AP-Data-Training.html>

General information: <http://academicaffairs.ucsd.edu/aps/apol/index.html>

## Assignment of roles in AP Data

The role you are assigned in AP On-Line *Review* determines which tasks you can perform and which screens you can see.

Department Security Administrators (DSAs) are responsible for assigning the roles of Department Chair, Department Staff, Dean, and Dean Staff.

The roles relevant to AP Data are listed below.

Department Staff: The role assigned to department academic personnel staff. More than one person in a department may be assigned this role. Department staff can only access records and run reports for individuals associated with their assigned unit(s). Department staff have read only access to the Employee, Review History, and AP Status data screen and limited editing permissions on the Unit 18 data screen.

Department Chair: The role assigned to the actual Department Chair. Department Chairs may only access records and run reports for individuals associated with their assigned unit. Department staff have read only access to the Employee, Review History, and AP Status data screen and limited editing permissions on the Unit 18 data screen.

Dean Staff: The role assigned to Deans' staff members responsible for academic personnel affairs. Dean staff can run reports for individuals associated with their assigned division and have global access to the data entry screens. More than one person in a Deans' office may be assigned this role.

Dean: The role assigned to the actual Dean. The Dean can run reports for individuals associated with their assigned division and have global access to the data entry screens.

CAP Staff: The role assigned to Academic Senate personnel who assist the Committee on Academic Personnel. CAP staff have read-only global access to the data entry screens.

APO: The role assigned to Academic Personnel Services staff members. APO staff have global access to the data entry screens and reporting. More than one person in Academic Personnel Services may be assigned this role.

## How to get more help with AP Data

If you have general questions regarding academic personnel policy, please contact your divisional dean's office.

If you have questions regarding technical issues or error messages in *AP Data* please contact Academic Technology Services (ATS), [ats@ucsd.edu](mailto:ats@ucsd.edu)

To submit general questions, feedback, suggestions for improvements or future enhancements, please contact Brandy Cheshire, [bmisquez@ucsd.edu](mailto:bmisquez@ucsd.edu)

## Academic Employee Report Tool

This tool provides the capability to run ad-hoc and canned reports on current academic personnel within your assigned unit(s). Enhanced reporting features will be introduced in future phases.

ACADEMIC PERSONNEL DATA MANAGEMENT SYSTEMUC San Diego

### Academic Employee Report

You may use this report for general information on academic employees in your unit(s). The information displayed in this report comes from PPS, so any errors should be corrected there.

Records displayed with a gold background exist in PPS, but corresponding records do not exist in the APOL database. You may click the "Add" link to add an employee to the APOL database. Click "View" to see the data currently stored in the APOL database for that employee. An initial check will be done to see if any changes have been made to that person's PPS record, and any updates will be automatically made in the APOL database. You may experience a slight delay while this validation occurs.

Please select your search criteria

Go to AP Admin

Saved Searches

Presets

Select one

My saved searches

Select one

Choose Unit

Select a unit

Search

Academic Groups

- Regular Teaching Faculty - Ladder Ranks
- Regular Teaching Faculty - Acting Ranks
- Lecturers with (Potential) Security of Employment
- Unit 18
- Other Faculty
- Administrative Titles
- Other Academic Personnel and Pay Codes
- Student Assistants
- Librarians
- Researchers
- Cooperative Extension
- University Extension


## Creating ad-hoc reports

The screenshot shows a web interface for creating ad-hoc reports. At the top is a button labeled "Go to AP Admin". Below it is a "Saved Searches" section with two dropdown menus: "Presets" (with "Select one" as the current selection) and "My saved searches" (also with "Select one"). The "Choose Unit" section contains a dropdown menu labeled "Select a unit" and a "Search" button, which is circled in red. An orange callout with the number "1" points to the "Select a unit" dropdown. Below the "Choose Unit" section is the "Academic Groups" section, which has a list of checkboxes next to various academic group names. An orange callout with the number "2" points to this list. The groups listed are: Regular Teaching Faculty - Ladder Ranks, Regular Teaching Faculty - Acting Ranks, Lecturers with (Potential) Security of Employment, Unit 18, Other Faculty, Administrative Titles, Other Academic Personnel and Pay Codes, Student Assistants, Librarians, Researchers, Cooperative Extension, and University Extension.

1. Select the desired unit from the “unit” drop down menu. You will only have access to units assigned to you via AP On-Line Review.
2. Select the academic group(s) you would like to include on the report by clicking the checkbox next to the academic group name. If you would like to see all academic groups on the report, do not click any check boxes.
3. Click the “search” button.

The main report will contain the following default information for each academic employee: Name, Title, Rank, Step, OS indicator, and Home department.

## Current Academic Employees (37)


 Export as spreadsheet

Show/Hide salary info  Show/Hide reviews due  Show/Hide hire date



View	Name	Title	Rank	Step	OS	Home Department
	[REDACTED]	1100 - PROF-AY	Full Professor	2	0	Music
	[REDACTED]	1100 - PROF-AY	Full Professor	9		Music
	[REDACTED]	1100 - PROF-AY	Full Professor	9	0	Music

If you choose to include only Unit 18 appointees on your report, the default report will contain the following information: Name, Title, Home Department, Total Quarters, and Quarter Count Details.

## Current Academic Employees (21)

 Export as spreadsheet

Show/Hide salary info  Show/Hide reviews due  Show/Hide hire date

View	Name	Title	Home Department	Total Quarters	Quarter Count Detail
	[REDACTED]	1630 - LECT-AY	Basic Writing Program	3	Basic Writing Program (3)
<b>Add</b>	[REDACTED]	1632 - LECT-AY-1/9	Basic Writing Program		
	[REDACTED]	1630 - LECT-AY	Basic Writing Program	2	Basic Writing Program (2)

You may choose to add additional information to reports or filter results by selecting one or more of the following options:

### Report Filters

Title:

Rank:

Career Status:

Only missing from APOL database  Only in selected home department  Senate titles only

Only Unit 18 lecturers eligible for mentor meeting  Only Unit 18 lecturers missing mentor meeting status

Only Unit 18 lecturers missing non-reappointment reason  Only Unit 18 lecturers eligible for 10th quarter salary increase

Only Unit 18 lecturers eligible for excellence review

To save your query for future use, enter a name in the provided text field and click "Save current search". Your saved query will now be accessible via the "My saved searches" drop down menu for future use.

### Saved Searches

Presets

Select one ▾

My saved searches

Test query ▾

Enter a name for your search

Save current search

### Generating canned reports

1. Select the desired report from the “Presets” drop down menu.
2. Select the desired unit from the “Unit” drop down menu. You will only have access to units assigned to you via AP On-Line Review.
3. Click “Search”

### Available canned reports


Report title	Description
Unit 18 Eligible for 10 <sup>th</sup> Quarter Salary Increase	Report will show all individuals who have earned 9 quarters in the specified unit and upon reappointment, are eligible for a 10 <sup>th</sup> quarter salary increase.
Unit 18 Eligible for Excellence Review	Report will show all individuals who have earned 17 quarters in the specified unit and upon reappointment, are eligible for an excellence review
Unit 18 Eligible for Mentor Meeting	Results will show individuals who have been appointed to a 9th quarter in the specified unit.
Unit 18 Missing Mentor Meeting Status	Results will show all individuals who have been appointed to a 9th quarter in the specified unit and are missing a mentor meeting status data entry.
Unit 18 Missing Non-Reappointment Reason	Results will show all individuals who are currently appointed in a Unit 18 title who do not have a subsequent reappointment record in the database and are missing a non-reappointment reason data entry.




## Probationary Period Reports

One probationary period report is currently available, accessible by clicking the Probationary Period Reports button on Employee tab on the data entry screens.

**Probationary Period**

 [Probationary Period Reports](#)

Clock Start  

Clock Length

Years of Prior UC Service

Clock End

Must Be Promoted by July 1 of

Report title	Description
End Date Approaching	Results will show all individuals who are approaching the end of their 8-year probationary period in a selected academic year.

## Replacement AP Queries

The Academic Personnel Queries accessed through EmployeeLink and QueryLink have been retired and are no longer accessible. The AP Data Management system can be used to replicate results generated from the old queries.

### File Routing Status- replaces the Academic Personnel File Tracking Query

1. Search for the individual in the “employee lookup” tool.
2. Select the desired individual and click the “Review History” tab.
3. In the Current File Actions section, click the “view details” icon within the active proposed file action record.

ACADEMIC PERSONNEL DATA MANAGEMENT SYSTEM
UC San Diego

### AP Admin

AP Management

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Employee Record

---

Unit 18

---

**2** Review History

---

AP Status

---

APOL

---

Evals

**GREEN, Academic 3** (0GREEN113 // APOL ID 100109)

next review due: 7/1/2017

Current appointments

Title	Step	Full Time %	Department	OS	Base Salary	Market OS	Bonus OS	Total Salary	Scale Date
1100 - PROF-AY	2	100	GRAY [234]	O	\$90,600	\$12,400	\$0	\$103,000	7/1/2014

Current file actions

View / edit	Review year	Action	Begin date	End date	Department	Title code	Title / Rank	Step %	Total salary	Scale date	Status	View details	Delete action
	2016-2017	MERIT + OFF SCALE - DEAN'S AUTH	11/7/2016		GREEN	1100	PROF-AY	3	100 \$112,700	7/1/2016	<b>3</b>		

[+ Add action](#)

Review outcome history [Export as spreadsheet](#)

### RED, Candidate ( / )

next review due: 7/1/2017

#### Current appointments

Title	Step	Full Time %	Department	OS	Base Salary	Market OS	Bonus OS	Total Salary	Scale Date
1100 - PROF-AY	2	100	RED [239]	O	\$90,600	\$12,500	\$0	\$103,100	7/1/2014

#### Current file actions

View / edit	Review year	Action	Begin date	End date	Department	Title code	Title / Rank	Step %	Total salary	Scale date	Status	View details	Delete action
	2016-2017	ACCEL MERIT + OFF SCALE	7/1/2017	1/1/2079	RED	1100	PROF-AY	4	100 \$120,000	7/1/2016			

[+ Add action](#)

File routing

View action	To/For	Out Recommend Date	Rec'd back in APO	Result	Title Code	Title/Rank	Step	OS	Total Salary	Scale Date	Appraisal
	DEAN-BLUE RECOMMENDATION			-	-	-	-	-	-	-	-
	CAP RECOMMENDATION			-	-	-	-	-	-	-	-

4. Once expanded, you will see which campus reviewers the file has been sent to. Department staff will not yet have access to the reviewers’ recommendations. Only after the outcome has been issued will a department have access to the full recommendation data.

## Next Review Due Report: replaces the Academic Personnel Next Review Due Query

1. From the Academic Employee Report tool, select the desired unit from the “unit” drop down menu. You will only have access to units assigned to you via AP On-Line Review.
2. Select the academic group(s) you would like to include on the report by clicking the checkbox next to the academic group name. If you would like to see all academic groups on the report, do not click any check boxes.
3. Click the checkbox next to “Show/Hide reviews due”.
4. Click the “search” button.
5. Click the “export as spreadsheet” button to further manipulate the data. Within the excel sheet, you can filter the data to only display the desired next review due year.

### Academic Employee Report

You may use this report for general information on academic employees in your unit(s).

Records displayed with a gold background exist in PPS, but corresponding records do not exist in the APOL database. You may click the "Add" link to add an employee to the APOL database. Click "View" to see the data currently stored in the APOL database for that employee. An initial check will be done to see if any changes have been made to that person's PPS record, and any updates will be automatically made in the APOL database. You may experience a slight delay while this validation occurs.

Go to AP Admin

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**Saved Searches**

Presets  
Select one

My saved searches  
Select one

Enter a name for your search

[Save current search](#)

---

**Choose Unit**

1

4

---

**2 Academic Groups**

- Regular Teaching Faculty - Ladder Ranks
- Regular Teaching Faculty - Acting Ranks
- Lecturers with (Potential) Security of Employment
- Unit 18
- Other Faculty
- Administrative Titles
- Other Academic Personnel and Pay Codes
- Student Assistants
- Librarians
- Researchers

**Report Filters**

Title: All titles Rank: All Ranks Career Status: All Career Statuses

Only missing from APOL database  Only in selected home department  Senate titles only

Only Unit 18 lecturers eligible for mentor meeting  Only Unit 18 lecturers missing mentor meeting status

Only Unit 18 lecturers missing non-reappointment reason  Only Unit 18 lecturers eligible for 10th quarter salary increase

Only Unit 18 lecturers eligible for excellence review

---

**Current Academic Employees (74)**

Show/Hide salary **3**  Show/Hide reviews due **5**  Show/Hide hire date [Export as spreadsheet](#)

View	Name	Title	Rank	Step	OS	Home Department	Review Due
		1143 - PROF.-AY-B/E/E	Full Professor	9			7/1/2020
		1143 - PROF.-AY-B/E/E	Full Professor	9	O		7/1/2020
		1143 - PROF.-AY-B/E/E	Full Professor	9	O		7/1/2020
		1143 - PROF.-AY-B/E/E	Full Professor		A		7/1/2020
		1143 - PROF.-AY-B/E/E	Full Professor	9	O		7/1/2020
		1143 - PROF.-AY-B/E/E	Full Professor		A		7/1/2020
		1143 - PROF.-AY-B/E/E	Full Professor		A		7/1/2020
		1143 - PROF.-AY-B/E/E	Full Professor		A		7/1/2019
		1143 - PROF.-AY-B/E/E	Full Professor	9	O		7/1/2019
		1143 - PROF.-AY-B/E/E	Full Professor	1	O		7/1/2019

## Academic Appointee's History Report- replaces the Academic Personnel History Query

1. Search for the individual in the “employee lookup” tool.
2. Select the desired individual and click the “Review History” tab.
3. Click on the “export as spreadsheet” button located in the Review Outcome History section located on the “Review History” tab.

ACADEMIC PERSONNEL DATA MANAGEMENT SYSTEM
UC San Diego

### AP Admin

AP Management

Employee Record

Unit 18

2 **Review History**

AP Status

APOL

Evals

---

Employee Lookup

Back to APS Home

#### GREEN, Academic 3 (0GREEN113 // APOL ID 100109)

next review due: 7/1/2017

#### Current appointments

Title	Step	Full Time %	Department	OS	Base Salary	Market OS	Bonus OS	Total Salary	Scale Date
1100 - PROF-AY	2	100	GRAY [234]	O	\$90,600	\$12,400	\$0	\$103,000	7/1/2014

#### Current file actions

View / edit	Review year	Action	Begin date	End date	Department	Title code	Title / Rank	Step %	Total salary	Scale date	Status	View details	Delete action
	2016-2017	MERIT + OFF SCALE - DEAN'S AUTH	11/7/2016		GREEN	1100	PROF-AY	3 100	\$112,700	7/1/2016			

[+ Add action](#)

#### Review outcome history

3 Export as spreadsheet

View action	Review Year	Action	Begin Date	End Date	Department	Title Code	Title	Step %	Total Salary	Scale Date	Status	View details	Delete action
	2014-2015	MERIT + OFF SCALE - DEAN'S AUTH	7/1/2014	1/1/2019	GRAY	1100	PROF-AY	2 100	\$105,800	7/1/2016	FINAL		
	2011-2012	APPOINTMENT	7/1/2011	11/7/2016	GRAY	1100	PROF-AY	1 100	\$99,200	7/1/2016	ACCEPTED		

4. The approved final outcomes\* of previous appointment and review actions will be downloaded into an excel sheet for further manipulation.

View action	Review Year	Action	Begin Date	End Date	Department	Title Code	Title	Step %	Total Salary	Scale Date	Status	View details	Delete action
	2014-2015	MERIT + OFF SCALE - DEAN'S AUTH	7/1/2014	1/1/2019	GRAY	1100	PROF-AY	2 100	\$105,800	7/1/2016	FINAL		
	2011-2012	APPOINTMENT	7/1/2011	11/7/2016	GRAY	1100	PROF-AY	1 100	\$99,200	7/1/2016	ACCEPTED		

\* Results after approximately 1995.

Leave and Service Modification History: replaces the Academic Personnel Leaves and Duty Modification Query

1. Search for the individual in the “employee lookup” tool.
2. Select the desired individual and click the “Leave and Service Modification” tab.
3. Click on the “export as spreadsheet” button located in the Leave and Service Modification History section.

ACADEMIC PERSONNEL DATA MANAGEMENT SYSTEM UC San Diego

### AP Admin

AP Management

Employee Record

Unit 18

Review History

AP Status

**Leaves & Service Modifications**

APOL

Evals

---

Employee Lookup

Back to Reporting Tool

**GREEN, Academic 1** (0GREEN111 / A00000000 / APOL ID 100111)

**Sabbatical Credits**

Number of Credits:  Credits as of:

Comments:

[Save](#) [Cancel Edits](#)

---

**Leave and service modification history** [+ Add record](#) [Export as spreadsheet](#)

View / Edit	Status	Start	End	Kind	Description	Exception Desc	FMLA	% Pay	APM 025 Cat	APM 025 Activity
	Approved	7/1/2017	6/30/2018	APM 025	APM 025 ONLY			100	1	Executive Role
	Approved	7/1/2014	10/31/2014	Sabbatical	SABBATICAL FULL			100		

4. The leave and service medication records\* records will be downloaded into an excel sheet for further manipulation.

View / Edit	Status	Start	End	Kind	Description	Exception Desc	FMLA	% Pay	APM 025 Cat	APM 025 Activity
	Approved	7/1/2017	6/30/2018	APM 025	APM 025 ONLY			100	1	Executive Role
	Approved	7/1/2014	10/31/2014	Sabbatical	SABBATICAL FULL			100		

\* Results after approximately 1995.

## Employee Record Data Screen

This screen is the default screen in the academic's profile and contains personal, home department, appointment snapshot, degree/prior service, career milestones, and other special designation data.

Department Staff and Department Chairs have read only access to any information entered in Employee data screen limited to those appointees who have appointments in their assigned units.

Dean Staff and APO staff may add new records and edit existing records in the Employee data screen.

### AP Admin

#### AP Management

- Employee Record
- Unit 18
- Review History
- AP Status
- APOL
- Evals

Employee Lookup

[Back to APS Home](#)

### Employee Record

**PLEASE NOTE**  
Some information on this page is synchronized with the system of record (PPS). Those fields are not editable on this page for existing employee records, and any corrections should be made in PPS.

Please use the form below to edit an employee's information. Use the "Employee Lookup" form on the left of the page to find an employee's record.

#### Personal Information

Last Name	Employee Number	Gender
<input type="text"/>	<input type="text"/>	<input type="text" value="Please Choose..."/>
First Name	PID	Ethnic Group
<input type="text"/>	<input type="text"/>	<input type="text" value="Select an ethnic group"/>
Preferred Name	Employment Status	Ethnicity
<input type="text"/>	<input type="text" value="Please Choose..."/>	<input type="text" value="Select an ethnicity"/>

Citizen Status	Visa Type:	Partner/Spouse:
<input type="text" value="Please Choose..."/>		

#### Home Department

Sub Campus	Division/School	Department
<input type="text" value="Select a sub-campus"/>	<input type="text" value="Select a division"/>	<input type="text" value="Select a department"/>
College Affiliation	Affiliated Program	APO
<input type="text" value="Please Choose..."/>	<input type="text" value="Select one (if applicable)"/>	<input type="text" value="Select an APO unit"/>

#### Current Appointments

<h4>Degree/Prior Service</h4>	<h4>Career Milestones</h4>
Highest Degree	Hire Date
<input type="text" value="Please Choose..."/>	<input type="text"/>
Degree Year	LRF Hire Date
<input type="text"/>	<input type="text"/>
Degree Institution	Year Achieved Assistant Rank
<input type="text"/>	<input type="text"/>
Prior Service Description	Year Achieved Associate Rank
<input type="text" value="Please Choose..."/>	<input type="text"/>
Prior College/Univ	Year Achieved Full Rank
<input type="text"/>	<input type="text"/>

#### Other

HHMI/Ludwig	30 Day Leave Eligible	Special Designation
<input type="text" value="Please Choose..."/>	<input type="text" value="Please Choose..."/>	<input type="text" value="NONE"/>

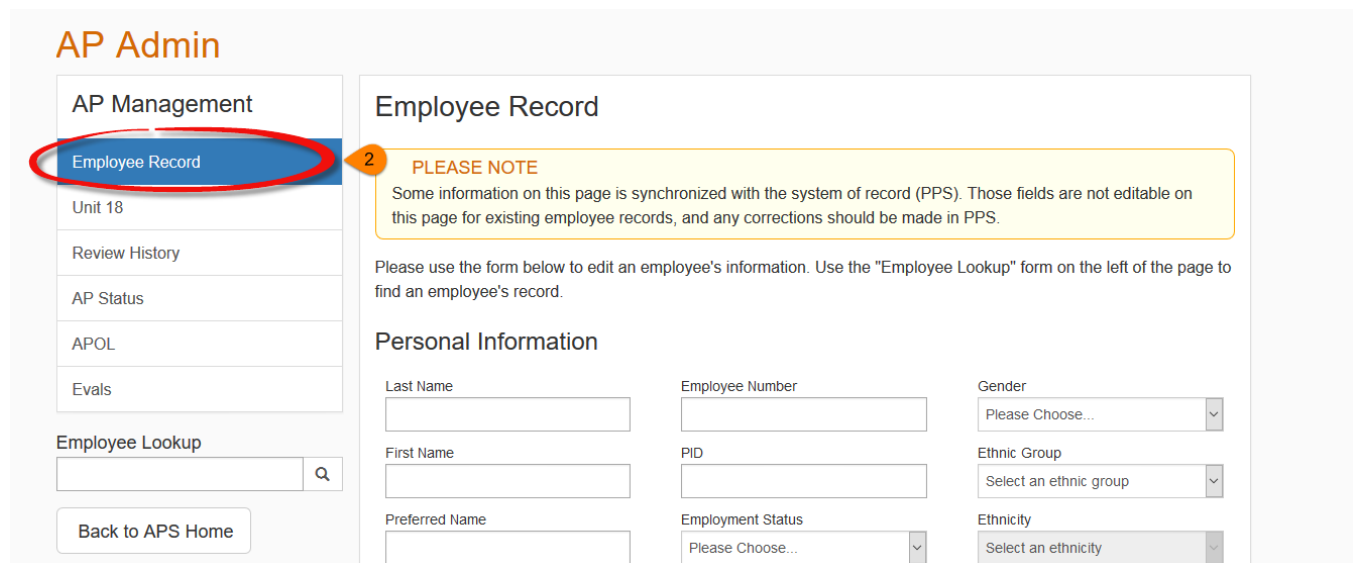
## Navigating to the Employee Record Data Screen

### Option 1

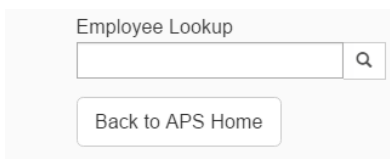
1. Click on the AP Data tab in APOL Review to enter the data entry screens.



2. Click on the Employee Record tab.



You may search for candidates by typing their first or last name in the “Employee Lookup” search bar located under the menu on the left side of the screen. You’ll see a list of like names appear from which you can click. For quicker results, the preferred method is to search by last name or partial last name.



Alternatively, you can search by name or employee ID number and click the search icon. A list of results will appear on top of the screen from which you can click the “view” button next to the appropriate individual.



## Option 2

1. From an on-screen report, click “view” next to the appointee’s name. You will be redirected the selected appointee’s employee record data screen.

### Current Academic Employees (29)

[Export as spreadsheet](#)

Show/Hide salary info  Show/Hide reviews due  Show/Hide hire date

Action	Name	Title	Rank	Step	OS	Home Department
<a href="#">view</a>	1	1100 - PROF-AY	Full Professor	1	O	Philosophy

## Option 3

1. From the Academic Employee Report page, click the “Go to AP Admin” button.

### ACADEMIC PERSONNEL DATA MANAGEMENT SYSTEM

UC San Diego

## Academic Employee Report

You may use this report for general information on academic employees in your unit(s). The information displayed in this report comes from PPS, so any errors should be corrected there.

Records displayed with a gold background exist in PPS, but corresponding records do not exist in the APOL database. You may click the "Add" link to add an employee to the APOL database. Click "View" to see the data currently stored in the APOL database for that employee. An initial check will be done to see if any changes have been made to that person's PPS record, and any updates will be automatically made in the APOL database. You may experience a slight delay while this validation occurs.

Please select your search criteria

[Go to AP Admin](#)

2. Click on the Employee Record tab.

### AP Admin

AP Management

[Employee Record](#)

Unit 18

Review History

AP Status

APOL

Evals

Employee Lookup

[Back to APS Home](#)

### Employee Record

#### PLEASE NOTE

Some information on this page is synchronized with the system of record (PPS). Those fields are not editable on this page for existing employee records, and any corrections should be made in PPS.

Please use the form below to edit an employee's information. Use the "Employee Lookup" form on the left of the page to find an employee's record.

#### Personal Information

Last Name

First Name

Preferred Name

Employee Number

PID

Employment Status

Gender

Ethnic Group

Ethnicity



You may search for candidates by typing their first or last name in the “Employee Lookup” search bar located under the menu on the left side of the screen. For quicker results, the preferred method is to search by last name or partial last name.

For your reference, a description of the type of data entered into each field is provided below.

## Personal Information Section

### Employee Record

[+ Add new record](#)

Some information on this page is synchronized with the system of record (PPS). Those fields are not editable on this page for existing employee records, and any corrections should be made in PPS.

Please use the form below to edit an employee's information. Use the "Employee Lookup" form on the left of the page to find an employee's record.

#### Personal Information

1	Last Name *	4	Employee Number	7	Gender *
2	First Name	5	PID	8	Ethnic Group *
3	Preferred Name	6	Employment Status *	9	Ethnicity
10	Citizen Status *		Visa Type:		Partner/Spouse:

- 1) **Last Name:** The candidate’s Last Name.
- 2) **First Name:** The candidate’s First Name.
- 3) **Preferred Name:** The candidate’s preferred name, if applicable.
- 4) **Employee Number:** The candidate’s employee ID number, if known.
  - Withdrawn or declined candidates are entered with 999999 as the employee id.
- 5) **PID:** If know, enter the candidate’s Personal Identification Number. Otherwise, the information will be pulled from other campus systems if generated.
- 6) **Employment Status.** Available selections:
  - ACTIVE
  - DECLINE
  - EMERITUS
  - DECEASED
  - NOT IN AP; STILL @UCSD (e.g. candidate is in a staff title)
  - NEED NEW STATUS-don’t use
  - PROSPECTIVE/PRE-EMPLOYEE (e.g. appointment candidate who does not have an employee ID yet)
  - SEPARATED

- WITHDRAWN
- NOT ACTIVE FOR VARIOUS REASONS-don't use

7) **Gender:** Candidate's gender.

8) **Ethnic Group:** Candidate's ethnic group. Available selections:

- AFRICAN AMER
- ASIAN
- HISPANIC
- NATIVE AMER
- OTHER NON-WHITE
- PACIFIC ISLANDER
- TWO OR MORE RACES
- UNKNOWN
- WHITE

Note: this field will no longer be editable once the record is cross-matched to PPS.

9) **Ethnicity:** Candidate's ethnicity. Choices vary based on the ethnic group selected in step 8.

10) **Citizen Status:** Candidate's citizenship status. Available selections are:

- CITIZEN
- NON-CITIZEN
- PERM RESIDENT
- UNKNOWN

## Home Department Section

The screenshot shows a form titled "Home Department" with the following fields and callouts:

- 11** Sub Campus \*: Select a sub-campus
- 12** Division/School \*: Select a division
- 13** Department \*: Select a department
- 14** College Affiliation \*: NONE
- 15** Affiliated Program: Select one (if applicable)
- APO: Select an APO unit

11) **Sub Campus:** Sub-campus for the candidate's home department. Available selections are:

- GC (General Campus)
- HS (Health Sciences)
- SIO (Scripps Institute of Oceanography)

12) **Division/School:** Division or school for the candidate's home department. Available selections are:

- A&H: Arts & Humanities
- APO: Academic Personnel Services
- BIO SCI: Biological Sciences
- ENG: Engineering
- GRAD STUDIES: Graduate Division
- LIBRARY
- PHYS SCI: Physical Sciences
- PROVOST
- SOC SCI: Social Sciences
- UNEX: University Extension

13) **Department:** Candidate's home department.

14) **College Affiliation:** College assignment.

15) **Affiliated Program:** An affiliated program, if applicable.

## Current Appointment Section

The current appointment section will be populated by PPS data once the two systems cross-match records.

## Degree/Prior Service Section

Degree/Prior Service	Career Milestones
16 Highest Degree * UNKNOWN	Hire Date * <input type="text"/>
17 Degree Year *	LRF Hire Date <input type="text"/>
18 Degree Institution *	Year Achieved Assistant Rank <input type="text"/>
19 Prior Service Description * UNKNOWN; TEST	Year Achieved Associate Rank <input type="text"/>
20 Prior College/Univ	Year Achieved Full Rank <input type="text"/>

16) **Highest Degree:** Candidate's highest earned degree.

17) **Degree Year:** Year that the candidate earned their highest degree.

18) **Degree Institution:** Institution where the candidate earned their highest degree.

19) **Prior service description:** Candidate's prior service description. Available selections are:

- EMPLOYED BY COLLEGE OR UNIV (INCL ANY UC CAMPUS)
- EMPLOYED BY DOE LABS
- EMPLOYED BY INDUSTRY
- EMPLOYED BY OTHER GOVERNMENTAL AGENCY
- EMPLOYED BY STATE OF CALIFORNIA
- NEED NEW CODE; EXISTING DOES NOT MEET NEEDS- rarely used
- NOT EMPLOYED
- SELF EMPLOYED
- STUDENT
- TESTING – do not select
- UNKNOWN; TEST– do not select

20) **Prior College or University:** If the candidate was previously employed by another college or university, the name of the institution will be entered here.

## Career Milestones Section

Degree/Prior Service	Career Milestones
Highest Degree * UNKNOWN	Hire Date * 21
Degree Year * 	LRF Hire Date 22
Degree Institution * 	Year Achieved Assistant Rank 23
Prior Service Description * UNKNOWN; TEST	Year Achieved Associate Rank 24
Prior College/Univ 	Year Achieved Full Rank 25

- 21) **Hire Date:** The date the candidate was hired into an academic appointment.
- 22) **LRF Hire Date:** If the candidate is appointed as a ladder-rank faculty (LRF), the start date of their LRF appointment. This field may differ from the Hire Date field.
- 23) **Year Achieved Assistant Rank:** The year the candidate achieved the “assistant” or LPSOE/Senior LPSOE rank in any series while at UCSD.
- 24) **Year Achieved Associate Rank:** The year the employee achieved the “associate” or LSOE in any series while at UCSD.
- 25) **Year Achieved Full Rank:** Enter the year the employee achieved the “full” or Senior LSOE rank in any while series at UCSD.

## Probationary Period Section

Probationary Period		
26	Clock Start 27	28
29	Clock End 30	Must Be Promoted by July 1 of
31	Title Please Choose...	32
		Reason for Extended Clock Please Choose...

- 26) **Clock Start:** The calendar date in which the appointment subject to the probationary period began.
- 27) **Clock Length:** Length of probationary period. Default value is 8, with options to extend to 9 or 10 years.
- 28) **Years of Prior UC Service:** Number of years of service in one or more series that that count towards the current 8-year probationary period. Values are 1-8, selected via a drop-down menu. The default entry is blank.
- 29) **Clock End:** the calendar date in which the individual’s probationary period ends. Automatically calculated based on the Clock Start date and the Clock Length.
- 30) **Must Be Promoted By July 1 of:** The year of which this person should be promoted by July 1.
- Note that the year corresponds to the start of the academic year that the clock end date falls within. For example, if the clock ends 6/30/2020, the must be promoted by July 1 field will show 2019 (i.e. July 1, 2019). This logic was specifically designed for reporting purposes and to ensure that proper notice is given to the

candidate should they not be promoted to the associate rank in time. In reality, the last possible promotion effective date for the example listed above is 7/1/2020.

- 31) **Title:** Title Code and Title Name, selected from drop down menu. Automatically pulled over from the final action record.
- 32) **Reason for Extended Clock:** Reason this person’s clock may not appear to be “normal”. Selections include:
- Childbearing extension
  - Parental Bonding extension
  - Family Leave
  - ASMD
  - Exception Extension

### Separation Section

If the academic is an active employee, the separation section will appear as follows:

The screenshot shows a form titled "Separation". At the top left is a blue button with a play icon and the text "Initialize Separation". Below this is a section titled "Other" containing three dropdown menus. The first is labeled "HHMI/Ludwig" and has "Please Choose..." as its selected value. The second is labeled "30 Day Leave Eligible" and also has "Please Choose...". The third is labeled "Special Designation" and has "NONE" selected. At the bottom left of the form are two buttons: a green "Save" button and a blue "Cancel" button.

If the academic is separated from UCSD, their separation section will contain the following data:

The screenshot shows a "Separation History" table. The table has the following columns: Title, Step, Department, Effective Date, Reason, Destination, and Future Institution. A single row of data is displayed: Title "1100 - PROF-AY", Step "2", Department "Computer Science and Engineering", Effective Date "6/30/2017", Reason "Resigned", Destination "Employed by college or university (including UC campus)", and Future Institution "DUKE U". There are callout bubbles with numbers 33 through 37 pointing to the Title, Effective Date, Reason, Destination, and Future Institution cells respectively. A blue "Rehire" button is located in the top right corner of the section.

Title	Step	Department	Effective Date	Reason	Destination	Future Institution
1100 - PROF-AY	2	Computer Science and Engineering	6/30/2017	Resigned	Employed by college or university (including UC campus)	DUKE U

33) **Title, Step, Department:** The primary title, step, and department at the time of the academic’s separation from UCSD.

34) **Effective Date:** Effective date of the separation

35) **Reason:** Reason this employee is leaving UCSD. Selections include:

- Death
- Medical Separation
- Resigned
- Intercampus Transfer
- Retirement
- Series Change from LRF/LSOE
- Series change to non-APO title
- Series change to non-academic
- Terminal/Denied Tenure
- Layoff

- Visa expired
  - Appointment expired
  - Dismissal-no longer certified/license
  - Unknown
- 36) Destination:** The academic's employment status following separation from UCSD. Selections include:
- Employed by industry
  - Student
  - Employed by State of California
  - Employed by DOE Labs
  - Employed by other governmental agency
  - Self-employed
  - Not employed
  - Employed by college or university (including any UC campus)
  - Not applicable (death or retirement)
  - Unknown
- 37) Future Institution:** If the academic will be employed by another college or University, the institution name will be displayed.

## Review History Data Screen

This tab contains information about the candidate's next review due date, their current appointment, any current proposed file actions, and a history of all prior file actions.

Department Staff and Department Chairs have read only access to any information entered on the Review History data screen and may only view records for appointees who currently have or previously held appointments in their assigned unit.

### AP Admin

**AP Management**

Employee Record

Unit 18

Review History

AP Status

APOL

Evals

Employee Lookup

## GRAY, Academic 3 (00GRAY165 // APOL ID 100146)

next review due: **7/1/2016**

### Current appointments

Title	Step	Full Time %	Department	OS	Base Salary	Market OS	Bonus OS	Total Salary	Scale Date
1100 - PROF-AY	2	100	GRAY [234]	O	\$90,600	\$9,500	\$0	\$100,100	7/1/2014

### Current file actions

View / edit	Review year	Action	Begin date	End date	Department	Title code	Title / Rank	Step %	Total salary	Scale date	Status	View details	Delete action
	2016-2017	ACCEL MERIT + OFF SCALE	7/1/2017	1/1/2079	GRAY	1100	PROF-AY	3 100	\$109,800	7/1/2016			

### Review outcome history

View action	Review Year	Action	Begin Date	End Date	Department	Title Code	Title	Step %	Total Salary	Scale Date	Status	View details	Delete action
	2014-2015	MERIT - DEAN'S AUTHORITY	7/1/2014	1/1/2079	GRAY	1100	PROF-AY	2 100	\$94,600	7/1/2013	FINAL		
	2011-2012	PROMOTION + OFF SCALE	7/1/2011	1/1/2079	GRAY	1100	PROF-AY	1 100	\$89,600	10/1/2011	FINAL		
	2008-2009	MERIT - DEAN'S AUTHORITY	7/1/2008	11/2/2016	GRAY	1200	ASSOC PROF-AY	4 100	\$87,200	10/1/2008	FINAL		
	2006-2007	APPOINTMENT	7/1/2006	1/1/2079	GRAY	1200	ASSOC PROF-	3 100	\$82,700	10/1/2007	ACCEPTED		

## Current file actions

To view current file actions and associated routing records, click the “view details” icon to expand the record.

### WHITE, Candidate (TRN000149 // APOL ID 100131)

next review due: 7/1/2017

#### Current appointments

Title	Step	Full Time %	Department	OS	Base Salary	Market OS	Bonus OS	Total Salary	Scale Date
1300 - ASST PROF-AY	2	100	WHITE [209]		\$61,100	\$0	\$0	\$61,100	7/1/2014

#### Current file actions

View / edit	Review year	Action	Begin date	End date	Department	Title code	Title / Rank	Step	%	Total salary	Scale date	Status	View details	Delete action
	2016-2017	PROMOTION	10/29/2016	1/1/2079	WHITE	1200	ASSOC PROF-AY	1	100	\$73,800	7/1/2016			

[+ Add action](#)

You may also click the “view button” to review more of the current file action proposal data.

For your reference, a description of the type of data entered into each field is provided below.

## File & Appointment Section

(00024: / A0178: )

### File & Appointment

1	Lead analyst Select one	4	Appointment Select one	7	Appointing department Select one
2	Review year Select one	5	Begin date [calendar icon]	8	Title Select one
3	File number [text input]	6	End date [calendar icon]	9	Step Select one
10	Post auditor Select one	11	Post audit date [calendar icon]	12	Recruitment number [text input]
				13	File received [calendar icon]

- 1) **Lead Analyst:** This field is used by AA&T to record the analyst who took the lead on this review file.
- 2) **Review Year:** Review year that corresponds to the appropriate review cycle.
- 3) **File number:** The file number is a numbering convention for the distinct review files received in a given review year. Every person reviewed will have a '1' and only those with subsequent review files submitted in the same review year will have a '2' or greater.

- For example, the home department submits a file in July to appoint a Lecturer for Fall quarter. This file would be '1'. Then, in December, another department submits a file to appoint the same person for Spring quarter. This file would be '2'.
- 4) **Appointment:** The appointment code is a labeling convention for the distinct department/title code combination of a review file. Every file will have an 'A' and only those appointed to a different title or by a different department in the same review year would have subsequent letters.
    - For example, if Professor Xavier is appointed 50% in Electrical and Computer Engineering and 50% in Nanoengineering, he would have two "appointments", and he would require 2 proposed records; one would be an 'A' (file # 1, Appointment A) and the other would be a 'B' (file #1, Appointment B). This same logic applies for someone appointed with a Professor and Researcher title in the same department.
  - 5) **Begin date:** Effective date for the proposed action.
  - 6) **End date:** End date for the proposed action.
    - Tenured or indefinite end dates are entered as 01/01/2079.
  - 7) **Appointing Dept.:** Department name in which this appointment is being made.
  - 8) **Title:** Proposed 4-digit numeric title code and title.
    - A list of title codes may be found at <http://ucop.edu/academic-personnel-programs/files/acad-title-codes/acad-titles-sorted-title-code.pdf>
  - 9) **Step:** Numerical step for this proposed action.
    - For Above Scale, A is entered in the step field.
    - For non-salaried appointments, NS is entered in the step field.
    - For titles without associated steps, None is entered in the step field.
  - 10) **Post auditor:** If the action was post audited by AA&T, the analyst's name who conducted the audit will appear in this field.
  - 11) **Post audit date:** This field is used by AA&T to record the date the file was post audited.
  - 12) **Recruitment number:** Affirmative action recruitment or waiver number.
  - 13) **File received:** The date file was received in the Dean's office for dean's authority files or the date received in AA&T for campus review files.

## Action Section

The screenshot shows a form titled "Action" with five dropdown menus. Each dropdown menu is highlighted with an orange circle containing a number: 14 for "Action", 15 for "Years accelerated", 16 for "Appraisal", 17 for "Retention case", and 18 for "Career equity review". The "Action" dropdown shows "Select one", "Appraisal" shows "Select one", "Years accelerated" is empty, "Retention case" shows "No", and "Career equity review" shows "No".

- 14) **Action:** Proposed file action by. See appendix A for a list of acceptable action types.
- 15) **Years accelerated:** If the proposal includes acceleration, the number of years that this proposed action is being considered in advance of when it normally would have been proposed.
  - For example, Professor Stark is currently an Associate Professor, Step 1 and is being proposed for an accelerated merit to Associate Professor, Step 3. This is two-year acceleration, so '2' should be entered into the Years accelerated field.
- 16) **Appraisal:** If the action includes an appraisal of an assistant rank or LPSOE, the department's appraisal rating outcome. Available selections are:



- FAVORABLE
- FAVORABLE W/RESERVATIONS
- PROBLEMATIC
- UNFAVORABLE

17) **Retention Case:** If this file is being processed in an attempt to retain an employee, “Yes” is entered in retention case drop down menu.

18) **Career Equity Review:** If the file proposed is coupled with a career equity review”, “Yes” is entered in the Career equity review drop down menu.

## Salary Section

The screenshot shows a 'Salary' form with the following fields and callouts:

- 19:** Salary type (dropdown menu)
- 20:** Market offscale disposition (dropdown menu)
- 21:** Market offscale amount (text input with '\$' prefix)
- 22:** Bonus offscale disposition (dropdown menu)
- 23:** Bonus offscale amount (text input with '\$' prefix)
- 24:** Range taper (dropdown menu)
- 25:** Percentage (text input with '0')
- 26:** Percentage type (dropdown menu)
- 27:** Scale date (dropdown menu)
- 28:** Scale rate (text input with '\$' prefix and '0')
- 29:** From scale (checkbox)
- 30:** Total salary (text input with '\$' prefix)

19) **Salary type:** Salary type code from the drop-down menu. Available selections are:

- Annual
- Hourly
- Monthly
- Weekly

20) **Market offscale disposition:** If the proposed salary includes a market off-scale component, a market off scale disposition is entered. Selections include:

- LIB OS
- COMBO EQ RESET
- COMPRESS RESET
- INCR AND RESET
- NEW
- PRE-EMP RESET
- PROMO RESET
- RESET
- TAPERED
- AC PERM: used for those Academic Coordinators who now have a permanent OS- rarely used
- PS PERM: used for those Project Scientists who now have a permanent
- OS- rarely used

21) **Market Offscale Amount:** Market off-scale amount.

22) **Bonus Offscale Disposition:** If the proposed salary includes a bonus off-scale component, a bonus off scale disposition is entered. Selections include:

- NEW
- PRE-2016

- TAPERED

- 23) **Bonus Offscale Amount:** Bonus off-scale amount.
- 24) **Range Taper:** This is an indicator of whether or not the tapered off-scale will be affected when the salary as a whole is ranged when a new salary scale is implemented.
- 25) **Percentage:** Percentage of effort, if applicable.
- 0 is entered for non-salaried appointments
- 26) **Percentage type:** Percentage type if applicable. Selections include:
- By agreement salary rate
  - Non-salaried
  - Variable percentage
- 27) **Scale Date:** Date of the salary scale used to determine the salary
- 28) **Scale Rate:** Scale rate for the rank and step proposed.
- 29) **From Scale:** If the scale rate is from the published scale, the “from scale” checkbox is selected.
- 30) **Total Salary:** The total salary rate based on the sum of the market offscale amount, bonus offscale amount, and the scale rate.

## Vote Section

**Votes** allow Senate and non-Senate voting

**Reviews**

Yes	No	Abstain	Absent	Eligible
31 0	32 0	33 0	34 0	35 0

**Appraisals**

Favorable	Favorable w/ reservations	Problematic
36 0	37 0	38 0
Unfavorable	Abstain	Absent
39 0	40 0	41 0
		Eligible
		42 0

43 Explanation of absent and/or abstain votes

- 31) **Yes:** number of “yes” votes.
- 32) **No:** number of “no” votes.
- 33) **Abstain:** number of “abstain” votes.
- 34) **Absent:** number of “absent” votes.
- 35) **Eligible:** The sum of all entered votes will generate a total eligible count.

If the proposed action included an appraisal:

- 36) **Favorable:** the number of “favorable” votes.
- 37) **Favorable w/reservations:** the number of “favorable with reservation” votes.

- 38) **Problematic:** the number of “problematic” votes.
- 39) **Unfavorable:** the number of “unfavorable” votes.
- 40) **Abstain:** the number of “abstain” votes.
- 41) **Absent:** the number of “absent” votes.
- 42) **Eligible:** sum of all entered votes will generate a total eligible count.

For all votes:

- 43) **Explanation of Abstain or Absent Voters:** Any explanation(s) given for any of the abstaining or absent voters, if provided.

### Publication Section

This section of the screen is optional and may be used to help keep track of publications received with a file.

- 1) **Publication type:** Type of publications submitted with the file. Choices are:
  - E-pubs (for electronic publications)
  - Paper
  - Mixed (for both electronic and paper publications)
  - None
- 2) **Publication comments:** Optional field used to describe the publications in detail. For example, you may see descriptions of the box or folder that the publications were received in to better identify them when they are ready to be returned to the candidate, or you may see a list the total number and type of publications received.
- 3) **Publication return date:** Date that the publications were returned to the department and/or candidate.

### Routing Records

Routing records are used for tracking EVC authority files and files requiring campus committee review. To view a routing record for a file that is currently undergoing campus review, click the view detail icon within the current file action record.

# GRAY, Academic 3 (00GRAY165 // APOL ID 100146)

next review due: 7/1/2014

## Current appointments

Title	Step	Full Time %	Department	OS	Base Salary	Market OS	Bonus OS	Total Salary	Scale Date
1100 - PROF-AY	2	100	GRAY [234]	O	\$90,600	\$9,500	\$0	\$100,100	7/1/2014

## Current file actions

View / edit	Review year	Action	Begin date	End date	Department	Title code	Title / Rank	Step	%	Total salary	Scale date	Status	View details	Delete action
	2016-2017	ACCEL MERIT + OFF SCALE	7/1/2017	1/1/2079	GRAY	1100	PROF-AY	3	100	\$109,800	7/1/2016			

Upon clicking, the record will expand to show the associated routing records. Please note that department staff will only see values from the To/For column. Other data is not available until the final action outcome has been released.

## Current file actions

View / edit	Review year	Action	Begin date	End date	Department	Title code	Title / Rank	Step	%	Total salary	Scale date	Status	View details	Delete action
	2016-2017	ACCEL MERIT + OFF SCALE	7/1/2017	1/1/2079	GRAY	1100	PROF-AY	3	100	\$109,800	7/1/2016			

[+ Add action](#)

### Final action

[▶ Initialize final action](#)

### File routing

View action	To/For	Out	Recommend Date	Rec'd back in APO	Result	Title Code	Title/Rank	Step	OS	Total Salary	Scale Date	Appraisal
	DEAN-A&H REVIEW		11/1/2016	11/3/2016	AS PROPOSED	1100	PROF-AY	3	O	\$109,800	7/1/2016	
	CAP REVIEW		11/9/2016	11/11/2016	MODDOWN	1100	PROF-AY	2	O	\$102,900	7/1/2016	

[+ Add routing](#)

## Review Outcome History

This section shows all actions previously approved for the selected candidate.

## WHITE, Candidate (TRN000149 // APOL ID 100131)

next review due: 7/1/2017

### Current appointments

Title	Step	Full Time %	Department	OS	Base Salary	Market OS	Bonus OS	Total Salary	Scale Date
1300 - ASST PROF-AY	2	100	WHITE [209]		\$61,100	\$0	\$0	\$61,100	7/1/2014

### Current file actions

View / edit	Review year	Action	Begin date	End date	Department	Title code	Title / Rank	Step	%	Total salary	Scale date	Status	View details	Delete action
	2016-2017	PROMOTION	10/29/2016	1/1/2079	WHITE	1200	ASSOC PROF-AY	1	100	\$73,800	7/1/2016			

[+ Add action](#)

### Review outcome history

[Export as spreadsheet](#)

View action	Review Year	Action	Begin Date	End Date	Department	Title Code	Title	Step	%	Total Salary	Scale Date	Status	View details	Delete action
	2016-2017	NO CHANGE - DEAN'S AUTH	7/1/2018	1/1/2079	WHITE	1200	ASSOC PROF-AY	2	100	\$77,300	7/1/2016			
	2016-2017	MERIT - DEAN'S AUTHORITY	7/1/2017	1/1/2079	WHITE	1200	ASSOC PROF-AY	3	100	\$85,500	7/1/2015	FINAL		
	2015-2016	APPOINTMENT	7/1/2016	6/30/2018	RED	1300	ASST PROF-AY	3	100	\$75,400	7/1/2015	ACCEPTED		

To view the proposed action and routing records for a finalized file action, click the “view details” icon. You may also see additional details on the approved final action record by clicking the “view” button.

## Unit 18 Data Screen

This screen provides data related to appointee's Unit 18 and Continuing Lecturer appointment history.

**Department staff are only responsible for entering their Unit 18 appointee's non-reappointment reason and mentor meeting status data into the AP Data Management System, no later than the last day of each quarter.** Deans AP staff and Academic Personnel Services enter other relevant data into the system.

### AP Management

- Employee Record
- Unit 18**
- Review History
- AP Status
- APOL
- Evals

Employee Lookup

(000 ) / A05 / APOL ID 1234572

Departmental staff must contact the Dean's office for updates to this section or to add records. Only the "Non-Reappointment" and "Mentor" fields are available for departmental staff to edit, after the record has been added by the Dean's office.

Click "Edit" to edit the details of an appointment listed below. Dean's office staff may click "Add" to add a listed appointment and its quarter count to the database. If a quarter count is being transferred from another UC campus, you may also [add it](#).

### Department Totals

Department	Pre-18	Cont Appt	3 Year	Total
Physics	9	0	0	9

### Unit 18 Quarter List

[Export as spreadsheet](#)

Edit	Appt #	Appointing Department	Begin Date	End Date	Title	Qtrs	Type	Hide
		PHYSICS [000220]	10/1/2006	12/31/2006	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2007	12/31/2007	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2008	12/31/2008	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2009	12/31/2009	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	4/1/2010	6/30/2010	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2010	12/31/2010	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	1/1/2011	3/31/2011	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2011	12/31/2011	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	1/1/2012	3/31/2012	1632 - LECT-AY-1/9	1	PRE-18	

## Mentoring meeting status data entry

**Departments are responsible for entering mentor meeting status data.**

- 1) Locate the appointment that contains the 9<sup>th</sup> quarter of service within the Unit 18 Quarter List and click the "edit" button.

**AP Management**

Employee Record

**Unit 18**

Review History

AP Status

APOL

Evals

Employee Lookup

Back to APS Home

(000: / A0 / APOL ID 1234572)

Departmental staff must contact the Dean's office for updates to this section or to add records. Only the "Non-Reappointment" and "Mentor" fields are available for departmental staff to edit, after the record has been added by the Dean's office.

Click "Edit" to edit the details of an appointment listed below. Dean's office staff may click "Add" to add a listed appointment and its quarter count to the database. If a quarter count is being transferred from another UC campus, you may also [add it](#).

### Department Totals

Department	Pre-18	Cont Appt	3 Year	Total
Physics	9	0	0	9

### Unit 18 Quarter List

[Export as spreadsheet](#)

Edit	Appt #	Appointing Department	Begin Date	End Date	Title	Qtrs	Type	Hide
		PHYSICS [000220]	10/1/2006	12/31/2006	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2007	12/31/2007	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2008	12/31/2008	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2009	12/31/2009	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	4/1/2010	6/30/2010	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2010	12/31/2010	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	1/1/2011	3/31/2011	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	10/1/2011	12/31/2011	1632 - LECT-AY-1/9	1	PRE-18	
		PHYSICS [000220]	1/1/2012	3/31/2012	1632 - LECT-AY-1/9	1	PRE-18	

- 1) Scroll through the expanded appointment details section and locate the Mentor section. Using the "Mentor Meeting Status" drop-down menu, select one of the following options: Completed, Declined, Postponed, and Scheduled.
- 2) If applicable, enter the date of the mentor meeting in the "Mentor Meeting Date" field using the calendar tool or by typing the date in the text field.
- 3) Upload the meeting documentation form in the "Mentor Meeting Documentation Form" section.
- 4) Click "Save".

### Appointment Details

**Appointment:**

Unknown appointment: 1632 - LECT-AY-1/9 (1/1/2012-3/31/2012)

Quarter Type \* Quarter Type Detail

PRE-18 Select one (if applicable)

[Quarter type descriptions](#)

**Appointment Quarters**

Quarter	Disposition	Cross-Listed Course
Winter Ctr 2012	MANUAL ENTRY; NOT IN FINAL ACTION	Select one (if applicable)

**Mentor**

Mentoring Meeting Status Mentoring Meeting Date

Select one (if applicable)

Mentoring Meeting Supporting Documentation

## Non-reappointment reason disposition data entry

**Departments are responsible for entering non-reappointment disposition data.**

- 1) Locate the appointment that requires a non-reappointment reason within the Unit 18 Quarter List and click "edit".

### GREEN, Academic 2 (0GREEN112 // APOL ID 100108)

Departmental staff must contact the Dean's office for updates to this section or to add records. Only the "Non-Reappointment" and "Mentor" fields are available for departmental staff to edit, after the record has been added by the Dean's office.



Click "Edit" to edit the details of an appointment listed below. Dean's office staff may click "Add" to add a listed appointment and its quarter count to the database. If a quarter count is being transferred from another UC campus, you may also [add it](#).

#### Department Totals

Department	Pre-18	Cont Appt	3 Year	Total
Anesthesiology	1	0	0	1

#### Unit 18 Quarter List

[Export as spreadsheet](#)

Edit	Appt #	Appointing Department	Begin Date	End Date	Title	Qtrs	Type	Hide
	0	ANESTHESIOLOGY [000316]	10/1/2016	12/31/2016	1632 - LECT-AY-1/9	1	PRE-18	

- 2) Scroll through the expanded appointment details section and locate the Non-Reappointment section. Using the Non-Reappointment Reason drop down menu, select one of the following options:
  - Reduced need - previous appt due to short-term need
  - Reduced need - current graduate student teaching
  - Reduced need - Senate faculty teaching
  - Reduced need - distinguished Visiting/Adjunct teaching
  - Reduced need - lack of enrollment
  - Recent graduate - preferential hire for training purposes
  - More qualified candidate selected
  - Intellectual/academic diversity
  - Programmatic change/course not offered
  - NSF did not apply
  - NSF withdrew application
  - NSF declined offer
  - NSF unable to teach due to scheduling conflict
  - NSF changed series
  - Poor performance
  - Negative excellence review
  - Inadequate visa status
  - Non-teaching quarter
  - Misconduct
- 3) Upload any non-reappointment supporting documentation, if desired.
- 4) Click "Save".



### Department Totals

Department	Pre-18	Cont Appt	3 Year	Total
Anesthesiology	1	0	0	1

### Unit 18 Quarter List

[Export as spreadsheet](#)

Edit	Appt #	Appointing Department	Begin Date	End Date	Title	Qtrs	Type	Hide
	0	ANESTHESIOLOGY [000316]	10/1/2016	12/31/2016	1632 - LECT-AY-1/9	1	PRE-18	

### Appointment Details

**Appointment:**

Unknown appointment: 1632 - LECT-AY-1/9 (10/1/2016-12/31/2016)

Quarter Type \* PRE-18 Quarter Type Detail Select one (if applicable)

[Quarter type descriptions](#)

### Non-Reappointment

Non-Reappointment Reason Select one (if applicable)

Non-Reappointment Supporting Documentation

Upload Choose File No file chosen

Upload Choose File No file chosen

Upload Choose File No file chosen

**Save** Cancel Edits

## AP Status Data screen

This tab displays the employee's current status along with the historical outcomes of prior review files and automatic salary increases (ranges). This is also where non-file entry changes such as a deferred next review date or a delayed start date to the final action are entered.

### GRAY, Academic 3 (00GRAY165 // APOL ID 100146)

### Status Records

[Export as spreadsheet](#)

View / edit	Begin date	End date	Department	Title code	Title/Rank	Step	OS	%	Salary type	Total salary	Scale rate	Market OS	Bonus OS	Scale date	Delete
	7/1/2014	1/1/2079	GRAY	1100	PROF-AY	2	O	100		\$100,100	\$90,600	\$9,500	\$0	7/1/2014	
	7/1/2011	6/30/2014	GRAY	1100	PROF-AY	1	O	100		\$89,600	\$80,100	\$9,500	\$0	10/1/2011	
	7/1/2008	6/30/2011	GRAY	1200	ASSOC PROF-AY	4	O	100		\$87,200	\$77,700	\$9,500	\$0	10/1/2008	

Changes to data once a decision on the outcome of a file has been made will be made on AP Status screen only.

The four instances where only AP status data entry is warranted (i.e. no proposed records are required):

1. Retirement of a faculty member and automatic granting of an "Emeritus" title.
2. Regularization cases where the candidate receives his/her Ph.D. and can be placed in a non-Acting title  
\*\*\* In addition update the Highest Degree information on the Employee tab.
3. Cases that are Dean's authority where an academic who is appointed to a non-salaried position will be salaried for more than 1 year of the appointment.
4. Cases that are Dean's authority where an academic who is appointed to a salaried position will be non-salaried for more than 1 year of the appointment.

Since these cases do not require a full file to be processed, all that is needed is a new AP Status record.

## Leaves & Service Modification Screen

This tab provides an academic's history of leaves and service modification. Service modifications include periods of active service-modified duties (ASMD) and periods of conflict of commitment. Leave and service modification history is limited to those that were dean or EVC authority; departments are responsible for tracking department chair authority leaves outside of AP Data at this time. The leave history records contain information back to approximately 1995 for most academics, with some histories going back further.

This tab also provides sabbatical credit accrual balance or leave in lieu "virtual credit" balance if the academic is appointed in a series eligible for sabbatical or leave in lieu of sabbatical. Those appointed in administrative titles will also have a separate administrative sabbatical credit accrual balance to reflect the number of credits that accrued while in an eligible administrative title.

Currently, the sabbatical credit balance reflects the available number of credits as of the quarter date in which the credits were last calculated. This "Credits as of Date" lets you know that.

- There has been no activity affecting the accrual since this date (e.g. leave or forfeiture).
- There has been no sabbatical credit usage recorded since this date.
- All activity affecting the accrual as well as sabbatical credit usage is accounted for through this date.

For example, if the data shows that an academic has 6 credits with a Credits As Of Date of Fall 2015, this academic has not taken any leaves since the end of Spring Quarter 2015, i.e. 06/30/2015, nor has this academic used any sabbatical credits. To determine the current available balance, add in the number of credits earned for each academic year since 06/30/2015, based upon their appointment basis, taking into consideration any leaves that have affected the quarters accrued.

Soon, the sabbatical credit balance will be updated to reflect the current balance and going forward, the sabbatical credit balance will automatically update to reflect the newly accrued credit after each academic quarter.

## AP Admin

**AP Management**

Employee Record

Unit 18

Review History

AP Status

Leaves & Service Modifications

APOL

Evals

Employee Lookup

Back to Reporting Tool

### GREEN, Academic 1 (0GREEN111 / A00000000 / APOL ID 100111)

#### Sabbatical Credits

Number of Credits:

Credits as of: Winter 2015

Comments: 

full sabbatical taken in Fal 2014.

Save
Cancel Edits

#### Leave and service modification history

+ Add record
Export as spreadsheet

View / Edit	Status	Start	End	Kind	Description	Exception Desc	FMLA	% Pay	APM 025 Cat	APM 025 Activity
	Approved	7/1/2017	6/30/2018	APM 025	APM 025 ONLY		100	1		Executive Role
	Approved	7/1/2014	10/31/2014	Sabbatical	SABBATICAL FULL		100			

For your reference, a description of the type of data entered into each field is provided below.

### Leave or Service Modification Records

### GREEN, Academic 1 (0GREEN111 / A00000000 / APOL ID 100111)

#### New Leave or Service Modification Record

1 Status \* Select one

2 Begin Date \*

3 End Date \*

# of Days

4 Kind \* Select one

5 Description \* Select one

6 Exception Description Select one

7 Sabbatical Credits Used

8 Service or Pay Select one

9 FMLA Select one

12 APM 025 Category Select one

13 APM 025 Activity Select one

10 % of Pay \*

11 FTE Reimb. Select one

14 Comments

Save
Cancel

- 1) **Status:** Status of leave or service modification request. Available selections are:
  - Approved
  - Cancelled (available when editing existing records)
  - Withdrawn (available when editing existing records)
  - Disapproved
  - Revised
  - In Process
- 2) **Being Date:** Begin date of leave. Entered as MM/DD/YYYY or selected via the calendar icon.
- 3) **End Date:** End date of leave. Entered as MM/DD/YYYY or selected via the calendar icon.

**# of Days** is automatically populated based on the Begin and End dates.

- 4) **Kind:** Type of leave or service modification. Available selections are:
 

<ul style="list-style-type: none"> <li>• APM025</li> <li>• ASMD</li> <li>• CONTINUATION OF PREVIOUS LEAVE</li> <li>• EXTENDED LEAVE</li> </ul>	<ul style="list-style-type: none"> <li>• LEAVE</li> <li>• OTHER MODIFICATION</li> <li>• SABBATTICAL</li> </ul>
--	--
- 5) **Description:** Leave or service modification description. Available selections are:
 

<ul style="list-style-type: none"> <li>• ADMIN</li> <li>• ADMIN /VACATION</li> <li>• APM025 ONLY</li> <li>• ASMD</li> <li>• CAREER DEVELOPMENT PROGRAM</li> <li>• CHANGE OF DUTY STATION</li> <li>• CHILDBEARING</li> <li>• EAP DIRECTOR</li> <li>• FIELD RESEARCH</li> <li>• FIELD RESEARCH/PROF DEVELOPMENT</li> <li>• GOVT/PUBLIC SERVICE</li> <li>• HHMI/LUDWIG</li> <li>• ILLNESS</li> <li>• LEAVE IN LIEU FULL</li> <li>• LEAVE IN LIEU PARTIAL</li> <li>• MEDICAL LEAVE (APM 710)</li> <li>• MILITARY</li> </ul>	<ul style="list-style-type: none"> <li>• OTHER</li> <li>• PARENTAL</li> <li>• PERSONAL</li> <li>• PERSONAL /VACATION</li> <li>• PRIOR EMPLOYMENT CLOSURE</li> <li>• PROF DEVELOPMENT</li> <li>• PROF DEVELOPMENT/VACATION</li> <li>• SABBATTICAL FULL</li> <li>• SABBATTICAL IN RESIDENCE FULL</li> <li>• SABBATTICAL IN RESIDENCE PARTIAL</li> <li>• SABBATTICAL PARTIAL</li> <li>• SPECIAL RESEARCH</li> <li>• SPECIAL RESEARCH /VAC</li> <li>• SWITCH PROF TO RES SCI &gt;50%</li> <li>• TEMP INTERCAMPUS TRANSFER</li> <li>• UC HUMAN RES INS (UCHRI)</li> <li>• WORKER'S COMP</li> </ul>
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- 6) **Exception Description:** Exception description. Available selections are:
 

<ul style="list-style-type: none"> <li>• &gt;1 YEAR LEAVE</li> <li>• ACCEPTED OTHER EMPLOYMENT</li> <li>• ADDITIONAL ASMD QUARTER(S)</li> <li>• ADVANCE SABB CREDITS</li> <li>• ASMD &gt;12 MOS FROM BIRTH</li> <li>• EXTENDED LEAVE &gt;30 DAYS</li> <li>• FLEXIBLE WORKLOAD</li> <li>• FORFEIT LESS</li> <li>• FORFEIT NONE</li> <li>• OUT OF COUNTRY</li> </ul>	<ul style="list-style-type: none"> <li>• PAYING FOR W/O SALARY</li> <li>• SABBATTICAL + LEAVE</li> <li>• SUB SERVICE FOR TEACHING</li> </ul>
--	--

- 7) **Sabbatical Credit Used:** The number of sabbatical credits used to take a sabbatical leave at the requested pay percentage OR the number of credits forfeited for a leave. In the future, adding a value in this field will deduct the number of credits used from the available sabbatical credit balance.
- 8) **Service or Pay:** Reflects whether the begin and end dates of the leave or service modification reflect pay dates or service dates.
- 9) **FMLA:** Indicates if the leave is designated as FMLA.
- 10) **% of Pay:** Percent of pay employee will receive while on leave or during the service modification.
- 11) **FTE Reimb:** Indicates if the request included a request for FTE reimbursement.
- 12) **APM 025 Category:** Type of APM 025 activity 1-3. Note, only Category 1 activities are entered at this time.
- 13) **APM 025 Activity:** Description of APM 025 activity. Available selections are:
  - Executive Role
  - Outside Teach/Resch
  - Salaried Employee
  - Other Potential Conflict
- 14) **Comments:** used to record additional information for the leave or service modification request.

### Sabbatical/Administrative/Leave in Lieu Credit Records

**GREEN, Academic 1** (0GREEN111 / A00000000 / APOL ID 100111)

#### Sabbatical Credits

Number of Credits	Credits as of	
3	Winter	2015
Comments		
full sabbatical taken in Fal 2014.		

Save
Cancel Edits

- 1) **Number of credits:** Number of credits accrued as of the quarter date of their last usage.
- 2) **Credits as of:** Quarter in which the credits where calculated
- 3) **Year:** Year in which the credits where calculated
- 4) **Comments:** Optional comments that provide additional information about the sabbatical credit balance.

## Appendix A: File Actions

File Actions	
ABOVE SCALE MERIT	REAPPT/MERIT/APPRaisal
ACCEL MERIT	REAPPT/MERIT/APPRaisal + OFF SCALE
ACCEL MERIT + OFF SCALE	REGULARIZATIONS
ACCEL PROMOTION	SERIES CHANGE + ACCEL MERIT
ACCEL PROMOTION + OFF SCALE	SERIES CHANGE + ACCEL MERIT WITH OFF SCALE
ACCEL REAPPT/MERIT	SERIES CHANGE + ACCEL PROMOTION
ACCEL REAPPT/MERIT + OFF SCALE	SERIES CHANGE + ACCEL PROMOTION WITH OFF SCALE
ACCEL REAPPT/MERIT/ APPRAISAL + OFF SCALE	SERIES CHANGE + MERIT
ACCEL REAPPT/MERIT/APPRaisal	SERIES CHANGE + MERIT WITH OFF SCALE
ACCELERATED ABOVE SCALE MERIT	SERIES CHANGE + PROMOTION
ACCELERATED FURTHER ABOVE SCALE MERIT	SERIES CHANGE + PROMOTION WITH OFF SCALE
APPOINTMENT	TERMINAL 1 YR REAPPT
APPRaisal	TERMINAL 2 YR REAPPT
CONTINUING APPT FOR UNIT 18	UPWARD SERIES CHANGE
CURRENT APPT DIVIDED INTO NEW TITLE/DEPT/%	
ESTABLISH STEP FOR NON-SALARIED ADJ. PROFESSOR	
FURTHER ABOVE SCALE MERIT	
LATERAL SERIES CHANGE	
LECTURER APPOINTMENT	
LECTURER APPT W/ MERIT	
LECTURER PERMANENT AUGMENTATION FOR CONT	
MERIT - CONTESTED	
MERIT - DEAN'S AUTHORITY	
MERIT + OFF SCALE - CAMPUS REVIEW	
MERIT + OFF SCALE - DEAN'S AUTH	
MERIT-CAMPUS REVIEW	
NO CHANGE - CAMPUS REVIEW	
NO CHANGE - DEAN'S AUTH	
NO CHANGE/APPRaisal	
NON-REAPPOINTMENT	
NON-SAL ADJ PROF REAPPT REVIEW EVERY SIX YEARS	
OFF SCALE SALARY INCREASE	
PROMOTION	
PROMOTION + OFF SCALE	
REAPPOINT/ESTABLISH STEP FOR (NS) ADJ. PROF	
REAPPOINTMENT - DEAN'S AUTH	
REAPPOINTMENT- CAMPUS REVIEW	
REAPPT/APPRaisal	
REAPPT/APPRaisal + OFF SCALE	
REAPPT/MERIT - DEAN'S AUTH	
REAPPT/MERIT + OFF SCALE - DEAN'S AUTH	
REAPPT/MERIT + OFF SCALE -CAMPUS REVIEW	
REAPPT/MERIT -CAMPUS REVIEW	