

2018-19 APM 025 Annual Certification in OATS

Instructions for Department Managers and Divisional Coordinators*

*Divisional Coordinators review the Annual Reports of department chairs and divisional appointees.

Reviewing Faculty Certifications for Dept. Chair or Dean Sign-off

Note: To align with the past paper process, it is recommended that you wait to "click review" on any of the certifications in your queue until all of the faculty in your department or division have certified their activities. As needed, follow up with faculty who have not submitted until everyone has submitted their report. (Only faculty who are on a medical leave may receive an extension to submit their report upon return from leave.)

Once all of the faculty in your department or division have certified their activities:

1. Log into OATS, click to **Fiscal Year 2018-19**
2. Go to ANNUAL CERTIFICATIONS and filter "in queue with no activities"
3. Select all records and bulk review these records by "sign rows that are checked"
4. Submit Action

1. to 3.

The screenshot shows the OATS Annual Certifications interface. At the top, the Fiscal Year is set to 2018-2019. There are tabs for FACULTY, AP REVIEW, and FISCAL REVIEW. A filter by date is present, and a filter by division is set to "-- Select a division --". Below these are tabs for NEEDS MY REVIEW, FORMS IN PROCESS, APPROVED, ALL ACTIVITIES, ANNUAL CERTIFICATIONS, and DELETED. The current view is ANNUAL CERTIFICATIONS. There are filter forms for Not Submitted, In queue (With no activities), In queue (With activities), In process, and Accepted. The In queue (With no activities) filter is selected. An "Export current data" button is visible. Below the filters is a table with columns: User ID, Last name, First, Department, Signed Date, # Activities, Total Hours, Total Earnings, Due To Plan, and Actions. The table shows two entries, both with 0 activities. The Actions column contains "Annual Certification Department Reviewer" buttons. At the bottom, there is a "Showing 1 to 2 of 2 entries" message and a "Sign rows that are checked" button.

4.

The screenshot shows a confirmation dialog titled "Annual Certification: Sign rows that are checked". The message inside says "You are about to sign 2 forms." At the bottom right, there are two buttons: "Submit Action" and "Close". The "Submit Action" button is highlighted with a green arrow. Below the dialog, the OATS interface is visible, showing the same filter tabs as in the previous screenshot, with the "In queue (With no activities)" filter selected.

5. Next, filter “in queue with activities”
6. Click on the Annual Certification Forms for each faculty member with activities.
7. Review (or Send Back to Faculty) and Submit Action for each faculty record with activities.

5. and 6.

Fiscal Year: < 2018 - 2019 >

Filter by date: From: To: Clear

Filter by division: -- Select a division --

★ NEEDS MY REVIEW ⚙️ FORMS IN PROCESS ✓ APPROVED 📅 ALL ACTIVITIES 📅 ANNUAL CERTIFICATIONS ✗ DELETED

FACULTY: ANNUAL CERTIFICATIONS Filter forms: Not Submitted In queue (With no activities) In queue (With activities) In process Accepted

Export current data

Show 100 entries

UID	Faculty	Department	Signed Date	# Activities	Total Hours	Total Earnings	Due To Plan	Actions
User ID	Last name, First	Department	09/09/2019	3	75.00	0.00	0.00	Annual Certification Department Reviewer
User ID	Last name, First	Department	09/09/2019	1	35.00	0.00	0.00	Annual Certification Department Reviewer

Showing 1 to 2 of 2 entries

7.

Annual Certification 2018 - 2019: Faculty Name (Department Reviewer)

ANNUAL CERTIFICATION DETAILS NOTES

Activity Label	Organization Type	Organization Name	Activity Type(s) / Role(s)	Student Involvement	Current Hrs / Earnings
my Cat. 1	Non Profit	Cat. 1	Teaching outside the University (Cat. 1)	Yes	75.00 / \$0.00

Income #	Type	Check/Transaction #/ Number of Shares	# of Reported Hours	\$ Amount Threshold	Date(s) Worked
134732	Uncompensated		10.00	0.00	10/01/2018 / 06/24/2019
134731	Uncompensated		15.00	0.00	08/20/2018 / 08/31/2018
134733	Uncompensated		50.00	0.00	10/20/2018 / 11/24/2018

Action: Reviewed Send Back To Faculty

Alternate Approver(s) Add Alternate Approver

None assigned

Historical Actions

09/09/2019 02:09:07 am Submit Laurence Andrews (lawandre@uconn.edu)

Submit Action Print Close