

eFilePlus – How eFilePlus Supports the 220 Process

This article contains information for:

- Overview of the Process
- Routing
- Documents
- Selecting the Candidate’s Response

Overview of the Process

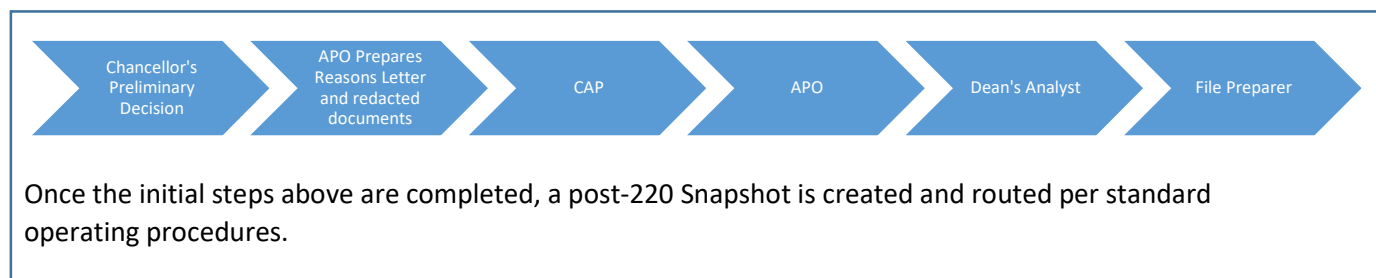
In the following situations the Chancellor’s first assessment is considered preliminary and it triggers the 220 process:

- If the Chancellor’s preliminary assessment is negative in cases for 7th year promotions, or
- If the Chancellor’s preliminary assessment is negative in cases for reappointments of Assistant Professors, or
- If the Chancellor’s preliminary assessment is contrary to the recommendation of the department, Dean or CAP.

In these cases, the Chancellor makes the final decision after the completion of the 220 process.

For more policy information refer [APM 220-80-j](#) and [The CALL](#).

Routing



The 220 process is initiated by the Academic Personnel Office (APO) based on the Chancellor’s decision.

Chancellor’s Options

Overview

Documents

Comments

Recommendations/Decisions

Actions

Action Options

☐ Action approved, Final decision is Positive

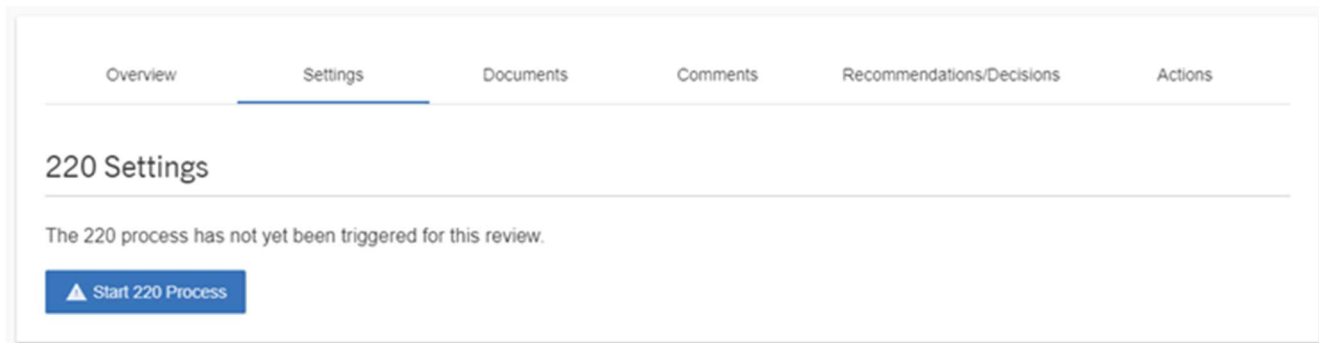
☒ Action not approved, Decision is Preliminary Negative

☐ Action not approved. Final decision is Negative

This option will invoke the 220 process. In the following situations the Chancellor’s first assessment is considered preliminary and it triggers the 220 process: (a) If the Chancellor’s preliminary assessment is negative in cases for 7th year promotions to tenure, or (b) If the Chancellor’s preliminary assessment is contrary to the recommendation of the department, Dean or CAP. In these cases, the Chancellor makes the final decision after the completion of the 220 process.

When the Chancellor selects, Action not approved, Decision is Preliminary Negative, a “Trigger 220 Process” button will be available in the “Settings” tab for APO Analysts as seen below. Once the button

is selected, the system will show a confirmation that the 220 process was started. The Snapshot is then referred to as the "pre-220" Snapshot.



Overview Settings Documents Comments Recommendations/Decisions Actions

220 Settings

The 220 process has not yet been triggered for this review.

▲ Start 220 Process

Once the appropriate documents have been added to the Pre-220 Snapshot by APO and CAP, a new routing option will become available for APO Analysts to “Return to College Review”.

A routing option will be available for the College/School to send the file for “Department Review”. A new 220 settings will become available for File Preparers. Refer to “Selecting the Candidate’s Response” below for more information.

Once the Post-220 process starts, the review can be routed back through the routing/approval process up to APO Final Review for a final review decision.

Documents

For 220 documents, users must select document types with a 220 label (ex: Department Letter-220, Advancement Summary-200, CAP Minute-220, etc.). Access to documents is based on the user’s role and the action.



Document Info X

Candidates Response to Material in File - 220

Confidentiality Statement (confidential)

Current Position Description

Departmental Letter

Departmental Letter - 220

Both the Documents and Recommendations/Decisions tabs will have Pre-220 sections to display information from the Pre-220 review state as shown below:

The screenshot shows the 'Documents' tab selected in a navigation bar with options: Overview, Settings, Documents, Comments, and Recommendations/Decisions. Below the navigation bar is a large dashed box containing the text: 'Drop file here or click to upload. Valid upload type is PDF.' Below this box, there is a section titled '220 Documents' with a message: 'No viewable documents have been uploaded'. Below that is a section titled 'Pre-220 Documents' containing four document cards. Each card has a document icon, a title, and upload information: 'Departmental Letter' (Uploaded by Brandon M Ayers, Feb 27, 2019), 'Candidates Response to Dept Letter' (Uploaded by Brandon M Ayers, Feb 27, 2019), 'Minority Report' (Uploaded by Brandon M Ayers, Feb 27, 2019), and 'Affirmative Action Statement' (Uploaded by Brandon M Ayers, Feb 27, 2019).

Selecting the Candidate's Response

Once the Snapshot has been routed back to the department File Preparer, a new 220 settings will become available for File Preparers as seen below.

The screenshot shows the 'Settings (220)' tab selected in a navigation bar with options: Overview, Settings (220), Documents, Comments, Recommendations/Decisions, and Extramural Letters. Below the navigation bar is a section titled '220 Options' containing three rows. Each row has a blue button on the left and descriptive text on the right. The first row has a 'Copy as Merit' button and text: 'Choose this option if the if the Candidate opts to proceed with a Merit without updating their Promotion Snapshot. Candidate's Response to the 220 must be included. (NOTE: Non 7th year Promotion and Promotions to Full actions may be recommended for a merit, in lieu of a promotion. The approval of the merit (with the non-updated file) will be stated in the 220 memo when the file is returned to the college.)'. The second row has a 'Copy as Updated Promotion' button and text: 'Choose this option if the Candidate opts to update his/her Promotion Snapshot and proceed with the Promotion. New information must be entered in eFile and a Candidate's Response to the 220 must be included.'. The third row has a 'No Updates' button and text: 'Choose this option if the Candidate opts not to provide a response to the 220 process. Candidate's Declination to 220 must be included.'.

The department File Preparer (working with the Candidate and Chair) can indicate the candidate's choice for how to proceed.

Important Notes

1. The eFile system will keep a detailed history of all documents, decisions and recommendations for the pre-220 and post-220 Snapshot.
2. Pre-220 Recommendations/Decisions are displayed in a separate section in the Recommendations/Decisions tab.

The screenshot shows the 'Recommendations/Decisions' tab selected in a navigation bar. Below the tab, a message states 'No approvals have been recorded'. Under the heading 'Pre-220 Recommendations/Decisions', there are two review entries. The first entry is for 'Laosheng Wu' (Chair Review) dated '02/27/2019 03:28 PM' with the action 'Accept'. The second entry is for 'Richard Cardullo' (Candidate Review) dated '02/27/2019 03:28 PM' with the action 'Accept'.

3. A “View Original Pre-220 File” link is available in the snapshot header information section as shown below.
4. The type of 220 action is displayed in red in the header information section of the review as shown below.

The screenshot displays the 'eFilePlus Academic Personnel System' interface. The top navigation bar includes 'HOME', 'CANDIDATE REVIEWS', and 'VIEW CANDIDATE REVIEW'. The main content area shows a snapshot for '2018-2019 Merit (220 - Merit in Lieu of Promotion)' with a link to 'View Original Pre-220 File'. Below this, a timeline shows the review process: Department Review (completed), College Review, APO Review, CAP Review, APO Final Review, and Complete. A 'History' button is visible on the right.