eFilePlus Snapshot Comments Tab: Guidelines for Comment Creation and Viewing

In eFilePlus, Comments are added in support of Snapshots (review files). There are two types of Comments that can be saved to a Snapshot – General Comments and Routing Comments.

Please note: Comments should be limited to general information as they become part of the electronic record. Users are encouraged to develop guidelines on the use of this feature.

General Comments
Users within the different levels of review (Department, College, AP Office, and CAP) have the ability to add comments to a Snapshot. These are added within the Snapshot Comments tab. At each level, a user has the ability to add a comment and chose the other level-specific roles that can view the comment.
- General comments made by any user at the DEPARTMENT level are NOT viewable by users at the College, APO, or CAP level.
- General comments made by any user at the COLLEGE level are NOT viewable by users at the Department, APO, or CAP level.
- General comments made by any user at the AP OFFICE level are NOT viewable by users at the Department, College, or CAP level.
- General comments made by any user at the CAP level are NOT viewable by users at the Department, College, or APO level.

The following screenshots show how General Comments are added at each level of review:

Department-level General Comment Capabilities

College-level General Comment Capabilities

Comment   ×

Add Comment (Required)

_____

Comment Viewing Permissions

☑ Select All   ☐ Deselect All

☐ Dean's Analyst

☐ Dean

☐ Associate Dean Lead

☐ Associate Dean Reviewer

Save

AP Office-level General Comment Capabilities

Comment   ×

Add Comment (Required)

_____

Comment Viewing Permissions

☑ Select All   ☐ Deselect All

☐ APO Analyst

☐ Provost & EVC

☐ Vice Provost for Academic Personnel

☐ Chancellor

Save

CAP-level General Comment Capabilities

Comment	×

Add Comment (Required)

Comment Viewing Permissions

☑ Select All   ☐ Deselect All

☐ CAP Analyst

☐ CAP Reader 1

☐ CAP Member

☐ Senate Ad Hoc Member

☐ Senate Ad Hoc Chair

☐ CAP Reader 2

☐ CAP Chair

[Save]

Routing Comments

Routing Comments are created only by roles that have the ability to route a Snapshot from one review level to the next or in reverse. These comments are optional when a Snapshot is routed forward and are required when a Snapshot is routed in reverse. ALL of the roles listed below can view ANY routing comments.

Routing Comments are displayed in the Snapshot 'Comments' tab, but are not viewable by all roles.

Routing Comments are OPTIONAL when a Snapshot is routed FORWARD. Only the roles of File Preparer, Dean's Analyst, APO Analyst, and CAP Analyst can see all Routing Comments. Snapshots are routed forward when:
- File Preparer routes forward to Dean's Analyst
- Dean's Analyst routes forward to APO Analyst
- APO Analyst routes forward to CAP Analyst

Routing Comments are REQUIRED when a Snapshot is routed IN REVERSE. Only the roles of File Preparer, Dean's Analyst, APO Analyst, and CAP Analyst can see all Routing Comments. Snapshots are routed backward when:
- CAP Analyst routes backward to APO Analyst
- APO Analyst routes backward to Dean's Analyst
- Dean's Analyst routes backward to File Preparer