How to Start and Route an Appointment in eFilePlus

An Appointment can be initiated by a File Preparer. This review type does not require any eFile data to be entered or included (e.g. Publications, Teaching, etc.). However, the required documents for an Appointment file must be included (refer to Checklists and Forms for the required documents: https://academicpersonnel.ucr.edu/checklists-and-forms#appointment_forms.

For policy information on academic Appointments, refer to the Senate CALL, Non-Senate CALL, or the Academic Hiring Toolkit. You may also consult with your Dean's office or Academic Personnel Office.

How to Create an Appointment (File Preparer Only)

1. Login to the eFilePlus system by navigating to https://efileplus.ucr.edu.

2. Go to Manage Candidate Reviews, click the yellow Plus icon ⊕ to open the dialog window for creating a new Snapshot. Enter a NetID for the candidate, and then select "Appointment" from the Action Type field.

Important Notes on NetID:

- BEFORE AN APPOINTMENT CAN BE ADDED, an affiliate role must be available AND the affiliate role must have a Faculty role in EACS.   Click on this link for information on how to request for an Affiliate account: How to Create an Affiliate Account.
- It's important to use the original affiliate id across all systems the candidate is appointed. Otherwise, the candidate will have multiple NetIDs that can potentially cause an issue. The NetID that was used to create the Appointment file must be the same NetID used once the candidate is appointed.

- For JPF/SWR number this can be found in APRecruit.

- For JPF URL, use the public URL for the recruitment which can be found here: https://aprecruit.ucr.edu/apply. There is no need to enter a URL for SWRs since these do not have a public URL.

1. Once Create is clicked, the system will create an Appointment and the following window below will be displayed.

Settings tab is where the File Preparer can select and enter the Department Chair and Faculty Reviewers information. For the Dean's Analyst, this is where they can select and enter the Dean's information. This tab is available for staff roles (File Preparer, Dean's Analyst, CAP Analyst, and APO Analyst). **Important:** Before routing, ensure that the Department Chair and Dean information have been entered.

Documents tab is where any user may upload supporting documents. For Appointments, the File Preparer has the option to upload a single PDF with all the required documents under the document type: Appointment File. Alternatively, the documents may be uploaded separately using the appropriate document type.

Comments tab is where any user can enter a general comment. For example, this is where the File Preparer can enter a note for Department Chair that the Snapshot is ready for review and approval. This tab is available for all roles.

Recommendations/Decisions tab is where the recommendations/decisions from reviewers will be displayed. This tab is available for select roles only (Department Chair, Dean, Dean's Analyst, CAP Analyst, APO Analyst, Vice Provost, Provost, Chancellor).

Actions tab is available to reviewers. This is where the candidates' acceptance, reviewers' recommendations/decisions and final decision will be recorded.

How to Route a Deferral

The following is the routing workflow for an Appointment (with VPAP, PEVC, Chancellor final decision authority). This routing path is managed through a Check Out Process.

File Preparer ▷ Department Chair ▷ Dean's Analyst/Dean ▷ APO Analyst ▷ CAP Analyst/CAP ▷ APO Analyst*

*For Appointments with VPAP, PEVC or Chancellor final decision authority, the APO Analyst will check-out the file to these roles.

For Appointments with Dean's final decision authority, the routing concludes with the Dean's office. The Dean's Analyst will forward the file to the APO Analyst for informational purposes only.

File Preparer's queue

To route the Appointment, the File Preparer will open the Checkout Process menu and click the link "Send to Chair Review".

Once the Chair completes their review and chooses Accept from the Actions tab, the Appointment goes back to the File Preparer's queue. The File Preparer can check out the file to the Dean's Office. **Important**: Remember to select a Department Chair under the Settings tab before checking out the Appointment.

Department Chair's queue

In this queue, the Department Chair must select their recommendation under the Actions tab.

Deferral Request	Documents	Comments	Recommendations/Decisions	Actions

Action Options

○ Accept
○ Return

Dean's Analyst queue

After the Dean's Analyst receives the Appointment from the File Preparer, they can check it out to the Dean for a decision. **Important**: Before checking out to the Dean, remember to do the following under Settings (1) under Dean Reviewers, select a Dean and (2) under Final Review Level, select Dean (for Dean's final decision authority) or APO (for VPAP, PEVC, Chancellor final decision authority).

Dean's queue

In this queue, the Dean must select their recommendation under the Actions tab. Once the Dean makes their recommendation or decision, the Appointment goes back to the Dean's Analyst queue.

If the Appointment has Dean's final decision authority*, the Dean's Analyst may check out the Appointment to the APO Analyst (APO Review) for informational purposes only. After the APO Analyst returns the Appointment to the College Analyst, the Dean's Analyst may (1) go to Actions tab and select a final decision and (2) go to Check Out Process and click Complete Review. **Important:** Do not enter a final decision under Actions until you are ready to close the file. This action cannot be undone.

If the Appointment is VPAP/PEVC/Chancellor final decision authority*, the Dean's Analyst may check out the Appointment to the APO Analyst.

*Refer to the Delegation of Authority Chart to determine final decision authority.

UC RIVERSIDE | Academic Personnel Office

APO Analyst queue

If the <u>Appointment is Dean's final decision authority</u>, the APO Analyst can review the recommendations/decisions and generate a comprehensive PDF. If needed, the file can be forwarded to CAP for informational purposes. After the APO Analyst completes the review, the user may return the Appointment to the College Analyst.

If the <u>Appointment is VPAP/PEVC/Chancellor final decision authority</u>, the APO Analyst can check out the Appointment to the CAP Analyst then to the VPAP or PEVC or Chancellor for a final decision. **Important**: Before checking out to any of the roles, remember to the following under Settings, select a Final Approver. Refer to the Delegation of Authority Chart to determine final decision authority


CAP Analyst queue

Once the APO Analyst checks out the file to the CAP Analyst, the CAP Analyst can open the Appointment to CAP using the Settings tab. Once the committee review is done, the CAP Analyst can do one of the following: (1) Route to APO for Final Review (use this option if there are no requested changes and/or request for additional information) or (2) Return to APO Review (use this option if there are requested changes and/or request for additional information.

How to Review an Appointment

When a Snapshot is ready for reviewers (Department Chair, Faculty Reviewers, Dean, CAP Analyst, CAP Committee, VPAP, PEVC, Chancellor), the reviewer will receive an email notification from the eFilePlus system.

The reviewer will login to the eFilePlus system by clicking in the link provided or by navigating to https://efileplus.ucr.edu.

Once logged in, the reviewer will see an "Awaiting Review" icon (called a tile). Click this icon to proceed to the Snapshot(s) waiting for review.
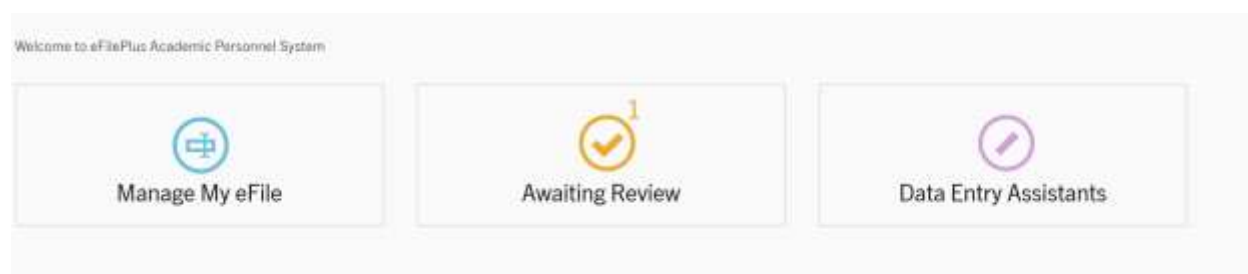
In the reviewer's screen, click three dots to open the menu and choose "Open Review".

To make a recommendation/decision, click on the Actions tab and enter a recommendation or select a decision option.

If you require further assistance, please contact the eFilePlus Subject Matter (SME) in your org Contact List or send an email to efilesupport@ucr.edu.