

The purpose of this tool is to provide a streamlined, secure channel for submitting retention data directly to the Academic Personnel Office. These tools allow colleges and schools to provide accurate, real-time data to ensure internal systems and reporting remain current.

**Colleges and Schools are encouraged to use this portal immediately upon receipt of a retention**

### I. How to use Retention Tracking tool

This guide provides descriptions and formatting details for each field used in faculty retention records. It explains the purpose of each field, acceptable values, and examples where applicable. The expectation is to complete these fields thoroughly.

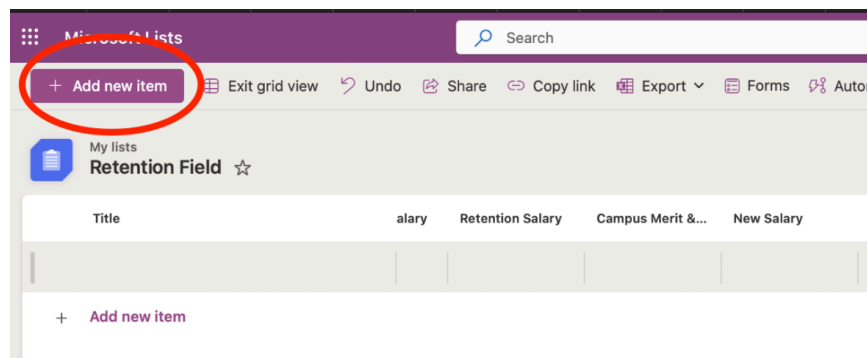
1. Go to <https://academicpersonnel.ucr.edu/college-tools>
2. Find your school and click on link for Retentions

## Reporting Tools for New Hires, Retentions and Separations

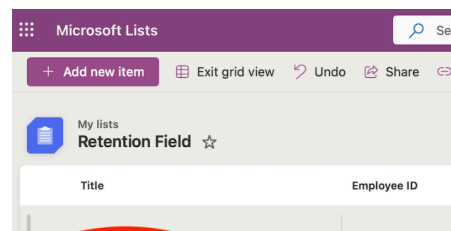
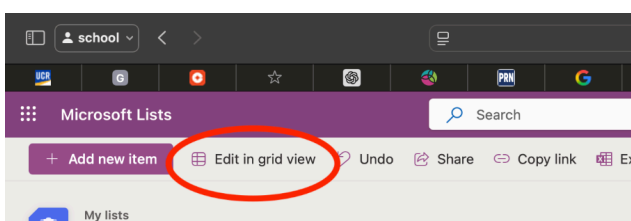
The New Hires, Retentions, and Separations reporting tools are real-time interfaces designed to monitor and track critical status changes for Senate faculty. These tools allow colleges and schools to provide accurate, real-time data to ensure internal systems and reporting remain current.



3. To add a New Entry either click:
  - a. Add new Item



- b. Edit in Grid View → Add new item





1. Enter values in following columns:

### Employee ID

<b>Description</b>	<b>Faculty's UCPATH Empl ID</b>
<b>Example Value</b>	10002345
<b>Allowed Values</b>	8 numeric characters

### Name (Last, First)

<b>Description</b>	<b>Name of the faculty member being retained</b>
<b>Example Value</b>	Smith, Billy

### Original Hire Date

<b>Description</b>	<b>Faculty's Hire Date</b>
<b>Example Value</b>	07/01/2000
<b>Allowed Values</b>	mm/dd/yyyy

### Gender

<b>Description</b>	<b>Gender of faculty member, to match UCPATH</b>
<b>Example Value</b>	Woman
<b>Allowed Values</b>	Man, Woman, Nonbinary

### Ethnic Group

<b>Description</b>	<b>Ethnicity of faculty member</b>
<b>Example Value</b>	CHINESE/Chinese American
<b>Allowed Values (Ethnic group description from HRDW)</b>	American Indian or Alaskan Native, Asian, Black or African American, Decline to state, Hispanic, Native Hawaiian or Pacific Islander, White

### Primary College

<b>Description</b>	<b>Name of faculty's primary college</b>
<b>Example Value</b>	Bourns College of Engineering
<b>Allowed Values</b>	BCOE, CHASS, CNAS, School of Business, SPP, SOE, SOM

### Department

<b>Description</b>	<b>Name of faculty's primary department</b>
<b>Example Value</b>	History
<b>Allowed Values</b>	Anthropology, Art, Biochemistry(see full list in SharePoint)

### Job Title Code (Current)

<b>Description</b>	<b>Faculty's current job title code</b>
<b>Example Value</b>	001100
<b>Allowed Values</b>	List of codes (see full list in SharePoint)

### Job Title Description (Current)

<b>Description</b>	<b>Faculty's current job title description</b>
<b>Example Value</b>	PROF-AY
<b>Allowed Values</b>	PROF-AY, ASSOC PROF-AY, ASST PROF-AY, PROF OF TEACH-AY, (see full list in SharePoint)

### Rank at Retention

<b>Description</b>	<b>Faculty's current job title description</b>
<b>Example Value</b>	Professor
<b>Allowed Values</b>	Professor, Associate, Assistant

### Step (Current)

<b>Description</b>	<b>Faculty's current step</b>
<b>Example Value</b>	I
<b>Allowed Values</b>	I, II, III, IV, V, VI, VII, VIII, IX

### Base or Above Scale Salary (Current)

<b>Description</b>	<b>Faculty's current base salary</b>
<b>Example Value</b>	\$116,600

### Off-scale (Current)

<b>Description</b>	<b>Faculty's current off-scale</b>
<b>Example Value</b>	\$10,000

### Beginning Salary

<b>Description</b>	<b>Current salary in dollars</b>
<b>Example Value</b>	\$150,000

### Retention Salary

<b>Description</b>	<b>Offered salary in dollars (base or above-scale + off-scale if applicable)</b>
<b>Example Value</b>	\$160,000

### New Salary

<b>Description</b>	<b>Faculty's new salary total based on approved review outcome</b>
<b>Example Value</b>	\$165,000

### Salary Increase %

<b>Description</b>	<b>Automatically calculated percentage increase (User may not manually enter this field- Read only)</b>
<b>Example Value</b>	3.1%
<b>Allowed Values</b>	Calculated as (New Salary - Beginning Salary) / Beginning Salary

### Year of Retention Action

<b>Description</b>	<b>Faculty's retention/review period</b>
Example Value	25-26
Allowed Values	10-11 through 25-26 (see list)

### Retention or Preemptive Retention

<b>Description</b>	<b>Action type</b>
Example Value	Retention
Allowed Values	Retention, Preemptive Retention

### Recruited By

<b>Description</b>	<b>Institution offering outside position</b>
Example Value	UCLA

### Outcome

<b>Description</b>	<b>Was UCR's offer accepted or denied</b>
Example Value	Accepted
Allowed Values	Accepted, Denied

### Outcome Details

<b>Description</b>	<b>Additional context about offer outcome</b>
Example Value	Professor Jones was offered a position at UCLA and UCR's \$10,000 counteroffer was not successful.

### Status

<b>Description</b>	<b>Status of the retention action</b>
Example Value	Pending
Allowed Values	Pending, Completed

### Campus Merit & Promotion (if applicable)

<b>Description</b>	<b>Type of faculty review in progress or completed</b>
Example Value	Merit
Allowed Values	Merit, Promotion, Advancement

### Separated

<b>Description</b>	<b>Whether faculty is separated from UCR</b>
Example Value	Yes
Allowed Values	Yes, No

### Separation Date (if applicable)

<b>Description</b>	<b>Faculty's separation date</b>
Example Value	06/30/2000
Allowed Values	mm/dd/yyyy

### Separation Reason (if applicable)

<b>Description</b>	<b>UCPath separation reason code</b>
<b>Example Value</b>	Resigned – Accept another job

### GSR Support

<b>Description</b>	<b>Number of quarters of GSR support provided over a specific time frame</b>
<b>Example Value</b>	3 quarters for 2 years

### Course Release(s)

<b>Description</b>	<b>Number of courses of teaching relied provided over a specific timeframe</b>
<b>Example Value</b>	2 courses for 2 years

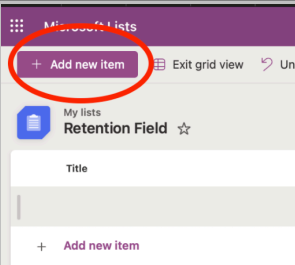
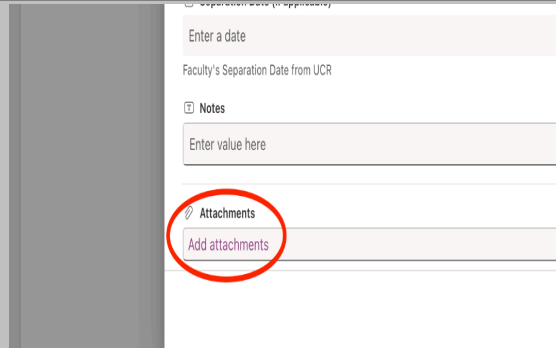
### Research Funds

<b>Description</b>	<b>Total amount of research support over a specified timeframe</b>
<b>Example Value</b>	\$50,000 annual amount for 2 years

### Notes

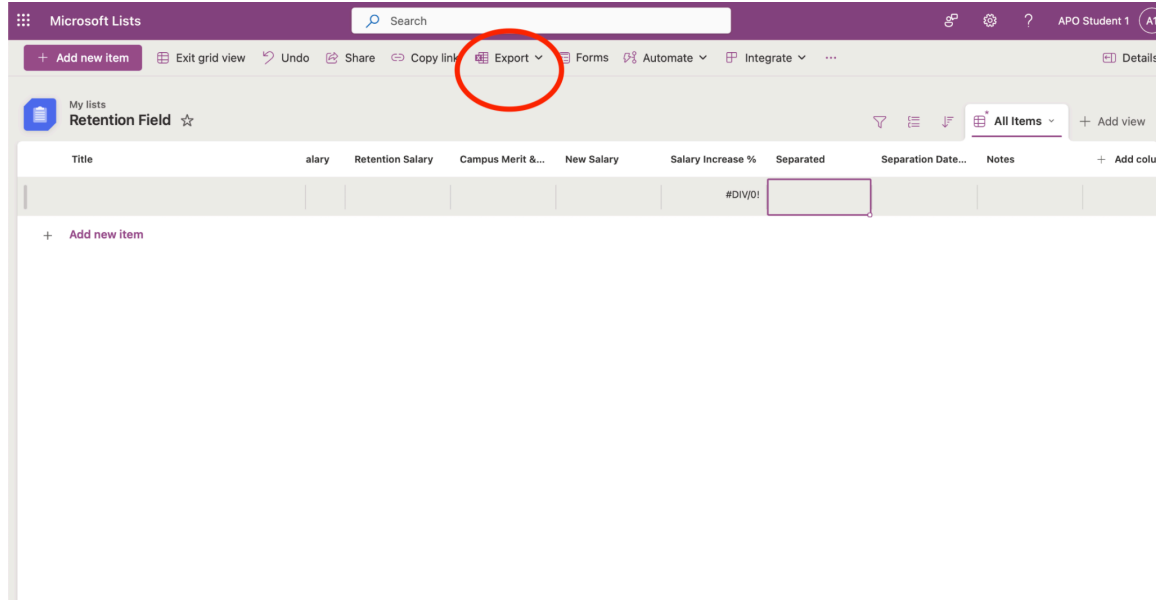
<b>Description</b>	<b>Any additional notes</b>
<b>Example Value</b>	—

### Attachments

<b>Description</b>	<p>To attach a document (e.g. copy of signed Retention/Preemptive Retention letter), user scrolls down to the bottom to Attachments. To add attachment after a record is created, the user double clicks on record and then scrolls down to the bottom to Attachments.</p>	
<b>Location</b>		

## II. How to export to excel (optional)

To export data from this list into an Excel sheet, click on 'Export' in the top menu bar and select 'Export to CSV'. This will download a copy of the list as an Excel-compatible CSV file to your computer.



### III. Who has access to Retention Tracking Tool

Retention Tool Tracking Access	
College/School	Contact
BCOE	Cecilia Gonzalez
CHASS	Susan Brown
CHASS	Briana Ellico
CNAS	Joy Salas
CNAS	Nancy Kane
SOE	Jasmine Salas
SOM	Margi Barnett
SPP	Jasmine Salas
BUS	Ana Kafie
BUS	Monica Miller

### IV. Processing Timeline

Schedule To Enter Data in the Tool	Timeline and Purpose
Friday, May 30, 2026	<ul style="list-style-type: none"> <li>Approved Senate Faculty Retentions and Preemptive Retentions for 25-26 Academic Year announced <b>up through mid-June</b> (generally effective 7/1/26) needs to be entered in the tool and the signed copy of the letter uploaded to the record.</li> <li>Data with Status-Completed APO will use to process transactions in UCPATH during Mass PayPath processing around mid-June. Please refer to APO Spring Letter for Mass PayPath processing schedule.</li> </ul>
Friday, July 10, 2026	<ul style="list-style-type: none"> <li>Approved Senate Faculty Retentions and Preemptive Retentions for 25-26 Academic Year announced <b>up through mid-July</b> (generally effective 7/1/26) needs to be entered in the tool and the signed copy of the letter uploaded to the record.</li> <li>Data with Status-Completed APO will use to process transactions in UCPATH during Mass PayPath processing around mid-June. Please refer to APO Spring Letter for Mass PayPath processing schedule.</li> </ul>
Ongoing	<ul style="list-style-type: none"> <li>Approved Senate Faculty Retentions and Preemptive Retentions for 25-26 Academic Year <b>announced after July 10, 2026</b> (generally effective 7/1/26) needs to be entered in the tool and also the signed copy of the letter.</li> <li>Data with Status-Completed needs to be coordinated with respective shared services centers to process transactions in UCPATH.</li> <li>APO will periodically pull data from tool if there is a data request and will also check in with AP Staff in case there are any records with a Status-Pending.</li> </ul>

## **V. Contact Information**

For questions related to Senate Faculty Retention and Preemptive Retention Tracking Tool and guide, please forward to:

### **Sonia Kalogonis**

*AP Policy & Compensation Analyst*

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