

Please refer to the CALL <a href="https://academicpersonnel.ucr.edu/the-call">https://academicpersonnel.ucr.edu/the-call</a> for the most current guidelines on the Deferral process.

### How to Start and Route a Deferral in eFilePlus

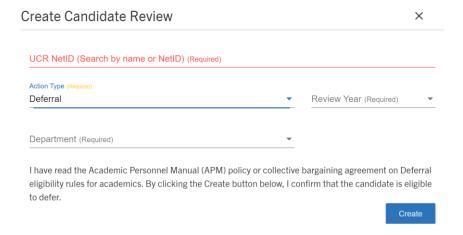
A Deferral can be requested by a File Preparer on behalf of a candidate or by an academic appointee who is eligible to defer. A deferral request does not require any eFile data to be entered or included (e.g. Publications, Teaching, etc.).

Consistent with how snapshots for other review types are set-up, the File Preparer will create a Deferral action. Candidate cannot create a Deferral snapshot.

# How to Create a Deferral (File Preparer Only)

Login to the eFilePlus system by navigating to <a href="https://efileplus.ucr.edu">https://efileplus.ucr.edu</a>.

1. 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 "Deferral" from the Action Type field.



2. Once Create is clicked, the system will create a Deferral and the following window below will be displayed.



APO:su Page 1 of 5



**Deferral Request** tab is editable by the File Preparer only. The information on this tab is taken from ACAPER. Before making any correction(s), contact your Academic Personnel Analyst for any discrepancy. This tab is available for all roles.

**Settings** tab is where the File Preparer can select and enter the Department Chair 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. Note that for Deferral, the Procedural Safeguard Statement is included within the candidate's action tab. This tab is available for all roles.

**Comments** tab is where any user can enter a general comment. For example, this is where the File Preparer can enter a note for the Candidate and 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).

**Actions** tab is available to candidates and reviewers (for Deferrals, Candidate, Department Chair, Dean, and College Analyst) and 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 a Deferral. This routing path is managed through a Check Out Process.



## File Preparer's queue

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

APO:su Page **2** of **5** 



Once the Candidate completes their review and chooses Accept from the Actions tab, the Deferral will be back to the File Preparer; from here the File Preparer can check out the file to the Chair. Important: Remember to select a Department Chair under the Settings tab before checking out the Deferral.

After Chair review, the File Preparer may check out the Deferral to the Dean's office (College Review).

## Candidate's queue

In the candidate's queue, under Actions tab, the candidate must enter the reason for the Deferral and also correction.

Deferral Request Docu	ments	Comments	Actions		
action Options					
Accept     Return					
eason for Deferral (Required)					
-	vided the opportu	unity to exercise th	ose rights at the appropriate	ights under Section 200 of the Academic Pers times during the review process. If I have not	
					Save as Draft Subm
	,				Save as Draft Subm
	•		r must select	their recommendatior	Save as Draft Subm
	•	nent Chai	r must select	their recommendatior	n under the Actions ta
chis queue, the	Departm	nent Chai			n under the Actions ta
Deferral Request  Action Options  Accept	Departm	nent Chai			n under the Actions ta
Deferral Request	Departm	nent Chai			n under the Actions ta



APO:su Page 3 of 5



#### Dean's Analyst queue

After the Dean's Analyst receives the Deferral 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.



After the Dean makes a decision, the Dean's Analyst may check out the Deferral to the APO Analyst (APO Review) for informational purposes only. After the APO Analyst returns the Deferral 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.



# APO Analyst queue

In this queue, 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 Deferral to the College Analyst.

#### How to Review a Deferral

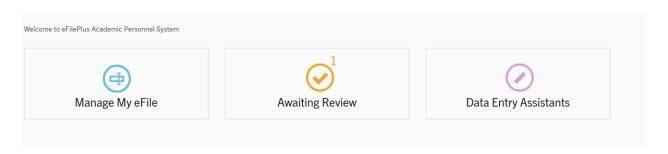
When a Snapshot is ready for reviewers (such as Candidate, Department Chair, and Dean), the reviewer will receive an email notification from the eFilePlus system.

The reviewer will login to the eFilePlus system by clicking in the link provided or by navigating to <a href="https://efileplus.ucr.edu">https://efileplus.ucr.edu</a>.

1. 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.

APO:su Page **4** of **5** 

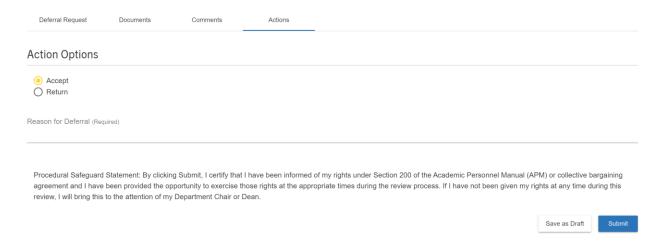




2. In the reviewer's screen, click three dots to open the menu and choose "Open Review".



To accept the Deferral or make a recommendation/decision, click on the Actions tab and select one of the options. For the Candidates, the procedural safeguard statement is included within the Actions tab.



These are general system guidelines and this document is not meant to replace policy. Please refer to the CALL for the most current policy information: https://academicpersonnel.ucr.edu/the-call.

If you require further assistance, please contact the eFilePlus Subject Matter (SME) in your org <u>Contact List</u> or send an email to <u>efilesupport@ucr.edu</u>. You may also create a ticket for support through ServiceLink: <a href="https://ucrsupport.service-now.com/ucr\_portal">https://ucrsupport.service-now.com/ucr\_portal</a> - click "Submit a Support Request".

APO:su Page 5 of 5