

HSCP Annual Certification (for approvers)

Basics

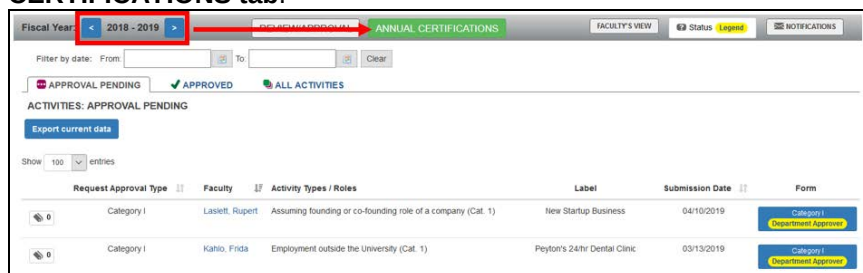
- **Compliance with APM 671:** Faculty are responsible for submitting annual reports of all Category I and II outside professional activities (OPA) and compensation earned from such activities (or the lack thereof) to the Department Chair. [APM 671-6-b-(6)]
- **Pending Approval Forms:** Faculty will not be able to complete the annual certification *until all* prior-approval forms (e.g., Category I, exceed threshold) have been approved and all payments due the Plan have been settled.

Getting Started

1. **Log into OATS:** Log into OATS using MyAccess: OATS will be listed as an application you can select; clicking on the application name will open a new browser and take you directly into the OATS system.

Reviewing Annual Certification Forms

2. **Use the arrow buttons** to navigate to the fiscal year reporting period for which you are approving annual certifications. Then **click the ANNUAL CERTIFICATIONS tab**.



Note: if you don't see the screen above, you may be in the Faculty view. Click on the blue **Approver's View** button to see the Approver View.

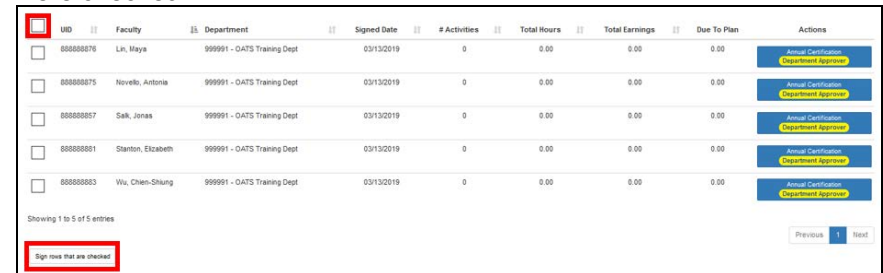


3. Once you are in the Annual Certification screen, you can use the radio buttons to select filtered views of annual certification forms:



- Not Submitted: *Waiting for faculty to certify*
- In queue (with no activities): *Pending your approval – no OPA*
- In queue (with activities): *Pending your approval – with OPA*
- In process: *Pending submission or review by department reviewer*
- Accepted: *Approved by Chair/Director*

4. To review and approve forms in your queue with no activity, **select the “In queue (With No Activities)” radio button**. You can *bulk* approve all forms from faculty who did not engage in any outside professional activity. **Check the box in the header row** to select all forms and **click the “Sign rows that are checked” button**. This will approve all the annual certification forms that were checked.



5. To review annual certification forms with activities, **select “In queue (With Activities)”**. Then **click the Annual Certification button** to review an individual faculty report. Click [here](#) for more detailed instructions on how to approve annual certifications.

