

Basics

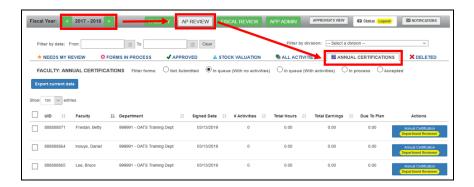
- Compliance with APM 671: Faculty are responsible for submitting annual reports of all Category I and II activities and compensation earned from such activities (or the lack thereof) to the Department Chair. [APM 671-6-b-(6)]
- Pending Approval Forms: Faculty will <u>not</u> be able to complete the 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

 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

 Use the arrow buttons to navigate to the fiscal year reporting period for which you are reviewing annual certifications. Click the AP REVIEW tab and then select the ANNUAL CERTIFICATIONS tab.

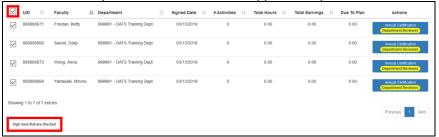


HSCP Annual Certification (for reviewers)

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 review no OPA
- In queue (with activities): Pending your review with OPA
- In process: Pending submission or Chair/Director approval
- Accepted: Approved by Chair/Director
- 4. To review forms in your queue with no activity, select the "In queue (With No Activities)" radio button. You can bulk review 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 push all the forms to the Approver's queue.



 To review annual certification forms with activities, select the "In queue (With Activities)" radio button. Click the Annual Certification button to review an *individual* faculty report. Click <u>here</u> for more detailed instructions on how to review annual certifications.

UID IT	Faculty	↓ Department	↓↑ Signed Date	# Activities	↓↑ Total Hours ↓↑	Total Earnings 🕸	Due To Plan	Actions
888888871	Friedan, Betty	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Reviewer
888888864	Inouye, Daniel	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Reviewer
888888865	Lee, Bruce	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Reviewer