



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 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 reviewing annual certifications. **Click the AP REVIEW tab** and then **select the ANNUAL CERTIFICATIONS tab**.

Fiscal Year: 2017 - 2018

AP REVIEW

ANNUAL CERTIFICATIONS

Filter by date: From To Clear

Filter by division: -- Select a division --

NEEDS MY REVIEW FORMS IN PROCESS APPROVED STOCK VALUATION ALL ACTIVITIES ANNUAL CERTIFICATIONS DELETED

FACULTY: ANNUAL CERTIFICATIONS Filter forms: Not Submitted In queue (With no activities) In queue (With activities) In process Accepted

Export current data

Show 100 entries

UID	Faculty	Department	Signed Date	# Activities	Total Hours	Total Earnings	Due To Plan	Actions
88888871	Friedan, Betty	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review
88888866	Inouye, Daniel	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review
88888865	Lee, Bruce	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review

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:

NEEDS MY REVIEW FORMS IN PROCESS APPROVED STOCK VALUATION ALL ACTIVITIES ANNUAL CERTIFICATIONS DELETED

FACULTY: ANNUAL CERTIFICATIONS Filter forms: Not Submitted In queue (With no activities) In queue (With activities) In process Accepted

Export current data

- 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.

UID	Faculty	Department	Signed Date	# Activities	Total Hours	Total Earnings	Due To Plan	Actions
88888871	Friedan, Betty	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review
88888866	Saund, Daip	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review
88888872	Wong, Anna	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review
88888869	Yamasaki, Minoru	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review

Showing 1 to 7 of 7 entries

Sign rows that are checked

5. 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 [here](#) for more detailed instructions on how to review annual certifications.

UID	Faculty	Department	Signed Date	# Activities	Total Hours	Total Earnings	Due To Plan	Actions
88888871	Friedan, Betty	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review
88888864	Inouye, Daniel	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review
88888865	Lee, Bruce	999991 - OATS Training Dept	03/13/2019	0	0.00	0.00	0.00	Annual Certification Department Review