2018 Annual College APO Workshop
Lauren Na

Assistant Dean of Academic & Staff Personnel
Order of Presentations

I. Introduction
II. UC Path
III. OPUS & Interfolio
IV. Interfolio Do’s and Don’ts
V. Lecturer or Senior Lecturer, (PSOE) or (SOE)
VI. Non-Renewal Form for Non-Senate/Term Appts.
VIII. OTP/MLA Appt. Process & Lecturer Announcements
IX. Forms
X. New AP Toolkit Website Preview
Introduction

Princy Barrios, Life Sciences Divisional Analyst
UC Path

Esther Hamil, Associate Director of Academic Personnel
Opus & Interfolio

John Abbott, OPUS
Interfolio Do’s & Dont’s

Peter Kim, Humanities Divisional Analyst
OPUS first, then Interfolio ... but both are required!

- All actions MUST be entered in OPUS.
- Dossier actions MUST be initiated in OPUS and then processed through Interfolio. Check the faculty member’s profile in OPUS to ensure it is accurate before proceeding to enter the action in Interfolio**.
- Warning: Although Interfolio will allow dossier cases to be processed without first entering the case in OPUS, this will create multiple problems for the review process (e.g. inability to track the progress of the case, closing out the final approval, etc.). Remember, cases must be entered in OPUS first!

**If the candidate has a vote waiver in another department, check the Opus profile to ensure that the waiver is up to date.
Use the Correct Template

- When entering an action in Interfolio, be sure to select the correct review template based on the approval authority (Dean’s Final actions vs. VC Final actions).

- Do not use any templates that are named “Full Process” as these do not apply to the College.

- VC Final actions that do not require CAP review must have the CAP steps manually deleted.
All Uploaded Materials Must Have Text Recognition

- If you upload a Microsoft Word or Excel document into Interfolio, the system will automatically convert those files into PDFs. However, we recommend checking the formatting after the upload is complete as fonts, spacing and other formatting may have been changed during the conversion.

- Enhance all PDF scans with the “Recognize Text” feature in Adobe Acrobat, also referred to as “OCR Text Recognition.” This will automatically make the file searchable, straighten out crooked pages, and adjust page orientation (if applicable).
Upload Materials in the Correct Section

- Be careful to upload materials according to their sections “Data Summary”, “Scholarly Work: Links & Copies”, “Supplemental Documents”, etc. Interfolio has descriptions of which items should be uploaded in each section, so follow those guidelines.

- Data Summary pages, vote page(s), bibliography, etc. should not be uploaded as one combined file. Save each file separately and then place each file in their appropriate section.

- Vote pages for split appointments should be saved and uploaded as separate files.

- Do not include bulleted numbers within any filenames in Interfolio (e.g.: 1. Data Summary Cover Page).
Letters Now Standardized for All Departments

- Check the toolkit for detailed directions on naming letter files.
- For all departments, all letters of evaluation must be numbered (e.g. External1 ..., Student3 ..., Intramural2 ..., etc.)
- All redacted letters must be uploaded in Interfolio and have the number correspond to the original, unredacted letter (e.g. External1_Candidate_Bruin_20170918_Redacted, etc.).
- Letters should be listed in reverse chronological order in Interfolio. Thus, they must be uploaded separately and not as a single, large file.
### Extramural Evaluators for Dr. Bruin

* - Selected by Candidate. ** - Selected by Committee. # - Selected by both

<table>
<thead>
<tr>
<th>Status</th>
<th>#</th>
<th>Evaluator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received</td>
<td>1</td>
<td>Dr. Oso</td>
</tr>
<tr>
<td>8/1/18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Received</td>
<td>2</td>
<td>Dr. Gom</td>
</tr>
<tr>
<td>8/2/18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Received</td>
<td>3</td>
<td>Dr. Xiong</td>
</tr>
<tr>
<td>8/3/18</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### External Evaluations

- [External Evaluator List](#)
- [Department Sample Solicitation Letter](#)
- [External1_Both_Xiong_Bruin_20180803](#)
- [External2_Chair_Gom_Bruin_20180802](#)
- [External1_Candidate_Oso_Bruin_20180801](#)
- [External3_Both_Bruin_20180803_Redacted](#)
- [External2_Chair_Bruin_20180802_Redacted](#)
- [External1_Candidate_Bruin_20180801_Redacted](#)
Double-check the Correct Orientation of All Uploaded Materials

- History Records, Assistant Professor Vote Pages, and certain Teaching Tabulation Spreadsheets MUST be uploaded in Interfolio in LANDSCAPE orientation.

- Double-check every page of uploaded files to ensure all pages are in the correct orientation (i.e. certain pages face upside down, portrait pages in landscape, etc.).
Label Files Correctly

- Be sure to label evaluation letters, publications, teaching evaluations and other items clearly and properly.
Split Appointments: Home Department takes the Lead

- For faculty with split appointments, the home department must take the lead on entering the action in OPUS and initiating the action in Interfolio. The home department should notify the secondary department(s) immediately once the case is ready in Interfolio.

- The home department should allow the secondary department(s) ample time to process their review.
Staff Recusals

- New department staff may need to recuse themselves from future review steps in Interfolio to avoid having unauthorized access.

Lecturer or Senior Lecturer with Potential Security of Employment (PSOE) or Security of Employment (SOE)
(Not Unit 18 Lecturer Series)

Princy Barrios, Life Sciences Divisional Analyst
Criteria

- **Lecturer (Potential Security of Employment)**
  - Assigned to professionally qualified appointees not under consideration for appointment in the Regular Professor series, whose services are contracted for special purposes

- **Senior Lecturer (Potential Security of Employment)**
  - Assigned to professionally qualified appointees whose salary is at the full professor level and whose services are an exceptional value to the university

- **Lecturer (Security of Employment)**
  - Individual must have demonstrated teaching ability of exceptional quality
  - Superior intellectual attainment as evidenced in the candidate’s teaching ability

- **Senior Lecturer (Security of Employment)**
  - Individual must have demonstrated teaching ability of exceptional quality.
  - Superior intellectual attainment as evidenced in the candidate’s teaching ability

- **Additionally:**
  - Earned distinction in the field (comparable to that attained by leading members of the professorial faculty)
  - Based entirely upon present teaching ability and upon professional attainment to date (NOT future responsibility)
Lecturer or Senior Lecturer (PSOE or SOE): General Information

- No Steps associated with this series
- Academic Senate Membership
  - Review the Department’s voting by-laws (Academic Senate vs. Tenure Faculty)
- Appointment begins July 1st, if necessary on November 1st or March 1st with approval
- Approval of a permanent FTE is required
  - Demonstrated that there is a programmatic need
  - Cannot be performed by an appointee in the Regular Professor Series or by a temporary appointee
- Appointment must be at 100%
- Assigned heavier instructional loads more than appointees in the professorial series
- Appointees may teach courses of any grade
- Does not engage in research
- Security of Employment is granted upon appointment or promotion as Lecturer SOE or Senior Lecturer SOE
- Not eligible for Sabbatical credits
General Information (cont.)

- See Salary Table 10 B-1, B-2
- Off-Scale Salary and Above Scale Salary are not applicable to this series.
- Lecturer (PSOE) annual rate commensurate with the value of the candidate’s services and the level of professional attainments
- Lecturer (SOE) annual rate is at or above the on-scale rate of the Associate Professor, Step I, Senior Lecturer (PSOE) and Senior Lecturer (SOE) annual rate is at or above the on-scale rate of Professor, Step I

### Table 1
FACULTY-LADDER RANKS—PROFESSOR SERIES ACADEMIC YEAR

<table>
<thead>
<tr>
<th>Rank</th>
<th>Step</th>
<th>Years at Step</th>
<th>Salary Scale 7/1/17 Annual</th>
<th>Salary Scale 7/1/18 Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td>--</td>
<td>--</td>
<td>51,900</td>
<td>4,325.00</td>
</tr>
<tr>
<td>Assistant</td>
<td>I</td>
<td>2</td>
<td>60,300</td>
<td>5,025.00</td>
</tr>
<tr>
<td>Professor</td>
<td>II</td>
<td>2</td>
<td>64,000</td>
<td>5,333.33</td>
</tr>
<tr>
<td>Associate</td>
<td>I</td>
<td>2</td>
<td>75,100</td>
<td>6,250.00</td>
</tr>
<tr>
<td>Lecturer</td>
<td>I</td>
<td>2</td>
<td>79,000</td>
<td>6,575.00</td>
</tr>
<tr>
<td>Lecturer</td>
<td>II</td>
<td>2</td>
<td>83,100</td>
<td>6,925.00</td>
</tr>
<tr>
<td>Lecturer</td>
<td>III</td>
<td>3</td>
<td>88,100</td>
<td>7,341.67</td>
</tr>
<tr>
<td>Lecturer</td>
<td>IV</td>
<td>3</td>
<td>94,900</td>
<td>7,908.33</td>
</tr>
<tr>
<td>Lecturer</td>
<td>V</td>
<td>3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Table 14-1
LECTURERS AND SENIOR LECTURERS WITH SECURITY OF EMPLOYMENT
LECTURERS AND SENIOR LECTURERS WITH POTENTIAL SECURITY OF EMPLOYMENT—100% TIME

<table>
<thead>
<tr>
<th>Rank</th>
<th>Salary Scale 7/1/17 Annual</th>
<th>Salary Scale 7/1/18 Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecturer With Security of Employment</td>
<td>60,692</td>
<td>4,141.00</td>
</tr>
<tr>
<td>Senior Lecturer With Security of Employment</td>
<td>55,208</td>
<td>3,532.00</td>
</tr>
<tr>
<td>Senior Lecturer With Potential Security of Employment—100% Time</td>
<td>55,208</td>
<td>3,532.00</td>
</tr>
<tr>
<td>Senior Lecturer With Potential Security of Employment—100% Time</td>
<td>55,208</td>
<td>3,532.00</td>
</tr>
</tbody>
</table>
Lecturer or Senior Lecturer (PSOE only)

- Term of Appointment is 2-Years or less
- Therefore, all correspondence must reflect the specific end date
- Mandatory Renewal of Appointment
- Mandatory Fourth-Year Appraisal
- Mandatory Eight Year Limit Review
- Eligible for Time off the Clock (TOC)
Lecturer or Senior Lecturer (SOE only)

- Mandatory Five-Year Review
- No Term Appointment
  - Therefore, renewal of appointment is not applicable to the SOE
- Lecturer (SOE) annual rate is at or above the on-scale rate of Associate Professor I
- Senior Lecturer (SOE) annual rate is at or above the on-scale rate of Professor I
## Routing and Approval

<table>
<thead>
<tr>
<th>LECTURER AND SENIOR LECTURER PSOE or SOE</th>
<th>REVIEW</th>
<th>APPOINTMENT APPROVAL AUTHORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECOMMENDED SALARY LEVEL COMPARABLE TO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistant Professor I-IV</td>
<td>Senate Review waived</td>
<td>Dean</td>
</tr>
<tr>
<td>At or Above the Associate Professor I</td>
<td>CAP</td>
<td>Vice Chancellor</td>
</tr>
<tr>
<td>Lecturer SOE &amp; Senior Lecturer SOE</td>
<td>CAP (Review Committee will be appointed as appropriate)</td>
<td>Vice Chancellor</td>
</tr>
</tbody>
</table>
Routing and Approval (Cont.)

- Who is the approving authority for an appointment as Lecturer PSOE with an annual salary of $68,907?
Non-Renewal Form for Non-Senate/Term Appointments

Zenia Kim, Physical Sciences Divisional Analyst
NON-RENEWAL FORM
NON-Senate Academic Appointees/Term Appointment

Form should be submitted to the Dean's Office
Three months prior to appointment's specified ending date

(Reference APM 137)

<table>
<thead>
<tr>
<th>NAME:</th>
<th>EMPLOYEE ID:</th>
<th>DEPARTMENT:</th>
<th>DEPT. CODE:</th>
<th>DATE PREPARED:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Form to be completed by home department or unit.

<table>
<thead>
<tr>
<th>SERIES:</th>
<th>ADJUNCT PROFESSOR</th>
<th>ACADEMIC ADMINISTRATOR</th>
<th>PROJECT SCIENTIST, RESEARCHER</th>
</tr>
</thead>
<tbody>
<tr>
<td>SELECT</td>
<td>Step</td>
<td>SELECT</td>
<td>SELECT</td>
</tr>
</tbody>
</table>

MOST RECENT APPROVEDTERM OF APPOINTMENT:  Begin:   End:  

SEPARATION DATE:  

TOTAL YEARS OF SERVICE IN THE SAME ACADEMIC TITLE OR TITLE SERIES AT THE TIME OF SEPARATION:  years  months

If eight (8) or more years of service*: For an appointee who has served at least 50 percent time for eight or more consecutive years in the same academic title or title series on this campus, the unit head is required to provide notice of non-reappointment at least 60 days prior to the appointment's specified ending date. In accordance with APM 137, the appointment may be extended to provide the required notice, or appropriate pay or leave of notice may be given.

If fewer than eight (8) years of service: For appointees who have served fewer than eight consecutive years in the same academic title or the series on this campus, the appointment terminates automatically on its specified ending date unless notice of reappointment is given.

Less than 50 percent time or short-term appointments of no more than one quarter: The University shall not be required to give written notice of non-reappointment to appointees.

ATTACH THE FOLLOWING ITEMS WHEN SUBMITTING THIS FORM TO THE DEAN'S OFFICE:

- Updated History Record
- *Draft Written Notice of Intent of Non-Reappointment (see back of this form for detailed instructions)

ADDITIONAL COMMENTS:

DEPARTMENT CONTACT INFORMATION: Name & Title  Extension

DEPARTMENT CHAIR OR UNIT HEAD: Signature  Date

Name & Title
PROCEDURES FOR WRITTEN NOTICE OF INTENT OF NON-REAPPOINTMENT

For an appointee who has served at least 50 percent time for eight or more consecutive years in the same academic title or title series on this campus, the unit head is required to provide notice of non-reappointment in accordance with APRM-129-22, which includes the notice requirements listed in the table below. For example, if Dr. Joe Brain has served for eight years as a Researcher at 100% and his appointment will not be renewed beyond its current date of June 30, you would follow the timeline indicated below.

Please note that if the unit head decides to rescind the Notice of Intent for any reason, the unit head shall inform the appointee in writing of the decision. The AP Coordinator should inform the Dean’s Office and proceed with completing the renewal form.

April 1
Submit a Non-Renewal Form, an updated History Record, and a draft Written Notice of Intent of Non-Reappointment to the Dean’s Office.

On or before May 1, Dean’s Office sends the draft Written Notice of Intent to the department.

May 15
Candidate responds to Written Notice of Intent (if applicable).

June 1
Department provides Written Notice of Action to employee (if applicable).

April 1
Submit a Non-Renewal Form, an updated History Record, and a draft Written Notice of Intent of Non-Reappointment to the Dean’s Office.

On or before May 1, Dean’s Office sends the draft Written Notice of Intent to the department.

May 15
Candidate responds to Written Notice of Intent (if applicable).

June 1
Department provides Written Notice of Action to employee (if applicable).

Written Notice of Intent:
The draft notice will be vetted by the Dean’s Office and returned to the Department prior to the 60 day notice requirement.

June 1
Written Notice of Action:
Following the review of a timely response from the appointee, if any, and within 50 calendar days of the date of issuance of the Notice of Intent, the unit head determines not to recommend reappointment, s/he must issue a written Notice of Action to the appointee of the non-reappointment decision and its effective date. The effective date shall be no earlier than 30 calendar days from the date of issuance of the Notice of Intent. The Notice of Action must also notify the appointee of the right to grieve the action under APRM-340.

Helpful Links:
- APRM-140 - Non-Senate Academic Appointees/Giveaways: http://www.ucop.edu/academic-personnel-programs/files/apm/aprm-140.pdf
- Benefits Office: https://benefits.ucdavis.edu
- Payroll Services: https://www.finance.ucdavis.edu/payroll
- Grievances: contact Grievance Liaison, Esther Hamil (call 310-825-1462 or email ehamil@ucmerced.edu)
In-Depth

SEPARATION DATE: 

TOTAL YEARS OF SERVICE IN THE SAME ACADEMIC TITLE OR TITLE SERIES AT THE TIME OF SEPARATION: _____ years _____ months

If eight (8) or more years of service*: For an appointee who has served at least 50 percent time for eight or more consecutive years in the same academic title or title series on this campus, the unit head is required to provide notice of non-reappointment at least sixty (60) days prior to the appointment’s specified ending date, in accordance with APM - 137. The appointment may be extended to provide the required notice, or appropriate pay in lieu of notice may be given.

If fewer than eight (8) years of service: For appointees who have served fewer than eight consecutive years in the same academic title or title series on a campus, the appointment terminates automatically on its specified ending date unless notice of reappointment is given.

Less than 50 percent time or short-term appointments of no more than one quarter: The University shall not be required to give written notice of non-reappointment to appointees.
Merit/Promotion Review Process for Temporary Appointments

Aimee Villarica, Social Sciences Divisional Analyst
MERIT/PROMOTION REVIEW PROCESS
FOR TEMPORARY APPOINTMENTS

FOR ACADEMIC ADMINISTRATOR (AA), ACADEMIC COORDINATOR (AC), SPECIALIST (SPEC), COORDINATOR OF PUBLIC PROGRAMS (CPP) AND PROJECT SCIENTIST SERIES.

For detailed instructions, refer to The Call and College AP toolkit.

<table>
<thead>
<tr>
<th>Candidate's Materials</th>
<th>Merit/Promotion Dossier</th>
<th>Completed Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updated CV, Self Statement, Diversity Statement (required) and Optional Material</td>
<td>Candidate's Materials + Cover Page + History Record + Updated Organizational Chart (for AA/AC/SPEC/CPP) + Supervisor's Assessment + if applicable, Candidate's written response to Supervisor's Assessment</td>
<td>Merit/Promotion Dossier + Chair/Director’s letter + if applicable, Candidate’s written response to Chair/Director’s letter</td>
</tr>
</tbody>
</table>

Prior to Departmental Review

- Start a new case in OPUS and initiate the review process action for Interfolio. Suggested templates:
  1. On-time Merit: Departmental Review: Professorial & Research: Dean’s Final
- Candidate’s Materials uploaded in Interfolio
- Candidate certifies the Prior Certification Form #1 in Interfolio

If applicable

Supervisor***

- Reviews Candidate’s Materials
- Provides Assessment Letter

Candidate

- Reviews Supervisor’s Assessment Letter
- If applicable, provides written response within 5 business days
- Certifies Prior Certification Form #2 in Interfolio

Chair/Director***

- Reviews Merit/Promotion Dossier
  1. Endorses Supervisor’s Assessment Letter OR
  2. Writes a separate recommendation letter

Candidate

- Receives the endorsed Supervisor’s assessment letter OR a separate Chair/Director’s recommendation letter
- If applicable, provides written response within 5 days
- Certifies After Certification Form in Interfolio

Case directed to Dean’s Office

- Send the case in Interfolio and provide the Dean’s Office with hard copy of dossier in the order indicated in the AP toolkit

* For guidance from the Office of Equity, Diversity and Inclusion (EDI), please visit: https://equity.ucla.edu/mediaguidance/
** Candidate's written response not to exceed 3 pages
*** Inform the supervisor/chair/director that their letters will be provided to the candidate for review and candidate has the opportunity to provide a written response. When a written response is provided, it is included in the dossier.
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Department: Prepare Dossier</td>
</tr>
<tr>
<td>2</td>
<td>Department: Assign Case to Review Committee</td>
</tr>
<tr>
<td>3</td>
<td>Department: Committee Review</td>
</tr>
<tr>
<td>4</td>
<td>Department: Assign to Voting Body</td>
</tr>
<tr>
<td>5</td>
<td>Department Review (Vote)</td>
</tr>
<tr>
<td>6</td>
<td>Department Chair’s Review</td>
</tr>
<tr>
<td>7</td>
<td>Department: Finalize &amp; Submit to Dean’s Office</td>
</tr>
<tr>
<td>8</td>
<td>Dean’s Office: Audit</td>
</tr>
<tr>
<td>9</td>
<td>Dean’s Review</td>
</tr>
<tr>
<td>10</td>
<td>Dean’s Office: Finalize &amp; Submit to APO</td>
</tr>
<tr>
<td>11</td>
<td>APO: Audit</td>
</tr>
<tr>
<td>12</td>
<td>Vice Chancellor’s Review</td>
</tr>
<tr>
<td>13</td>
<td>APO: Send Documents to Dean’s Office</td>
</tr>
<tr>
<td>14</td>
<td>APO: Complete the Case in Opus</td>
</tr>
</tbody>
</table>
Lecturer Announcements & OTP/MLA Process

Dennisse Pereira & Diana de Los Santos, Lecturers (Unit 18) Analysts
Announcement
  ▪ Effective immediately, ALL lecturers must reapply through UC Recruit
Temporary Augmentation
Data Summary Cover Page
  ▪ Present Status Box
  Yes
  ▪ Academic Coordinator
  ▪ Post-Doc
  ▪ Project Scientist
  ▪ Staff
    ▪ Ex. Staff Research Associate
  ▪ Lecturer
  ▪ All Visiting Titles
  No
  - Teaching Fellow
  - Summer Sessions
Job Postings
One Time Payments/Multi-Location Appointment
UCLA College as Home Campus

One-time Payment (OTP) / Multi-location Appointment (MLA) Process

OVERVIEW

- HOST DEPARTMENT initiates and completes form
- HOST CAMPUS APO Reviews and approves
- UCLA CAMPUS APO Reviews
- UCLA COLLEGE AP Office Dean endorses
- UCLA CAMPUS APO VC approves
- UCLA PAYROLL SERVICES
- UCLA DEPARTMENT Processes payment(s) as directed
- UC PATH USER Merced, Riverside, and Santa Barbara follow UC Path Policy and can process payment

DETAILED STEPS

**Step 1**
- Host Department (initiates and completes the form)
  1. Contacts the UCLA department to obtain all Home location information.
  2. Routes form to Host Campus APO.

**Step 2**
- Host Campus APO
  1. Reviews form.
  2. Obtains VC approval.
  3. Routes form to UCLA Campus APO.

**Step 3**
- UCLA Campus APO
  1. Reviews form for adherence to campus policy.
  2. Routes form to UCLA College AP Office.

**Step 4**
- UCLA College AP Office
  1. Verifies information.
  2. Obtains the Dean’s signature endorsement.
  3. Reroutes form to UCLA Campus APO.

**Step 5**
- UCLA Campus APO
  1. Obtains VC approval.
  2. Routes approved form to UCLA Payroll Services.

**Step 6**
- UCLA Payroll Services
  1. Processes the necessary transactions between the two campuses.

- UCLA Department
  1. Receives approved form from UCLA Campus APO or UCLA Payroll Services.
  2. Processes payment(s) as directed when Host campus is not UC Path User.

Notes:
- OTPs/MLAs can take approximately 2-3 months for the full approval process due to the coordination between multiple departments/campuses.
- When UCLA is the Home campus, and another UC Campus is hiring a UCLA emeritus faculty member, the UCLA department will need to initiate the action on OPUS and submit a Recall form to the College AP Office before the OTP/MLA form can be processed further.
UCLA College as **Host** Campus

**One-time Payment (OTP) / Multi-location Appointment (MLA) Process**

**DETAILED STEPS**

**Step 1**
UCLA Department (Initiates and completes form)
1. Contacts the Home department to obtain all Home location information.
2. Routes form to UCLA College AP Office.

**Step 2**
UCLA College AP Office
1. Verifies information.
2. Obtains the Dean's signature endorsement.
3. Routes form to UCLA Campus APO.

**Step 3**
UCLA Campus APO
1. Reviews form for adherence to campus policy.
2. Obtains VC approval.
3. Routes form to Home Campus APO.

**Step 4**
Home Campus APO
1. Reviews form for adherence to campus policy.
2. Obtains VC approval.
3. Routes approved form to appropriate office for processing.

**Step 5**
UCLA Payroll Services
1. Processes the necessary transactions between the two campuses.

**Step 6**
Payment
1. UCLA processes payment via UC Path.*

*Procedure subject to change as UC Path updates policies and/or procedures.

**Notes:**
- OTPs/MLAs can take approximately 2-3 months for the full approval process due to the coordination between multiple departments/campuses.
- In addition to submitting the Lecturer appointment request, you must also include the MLA form for a Lecturer who has a primary appointment at another UC.

*Do not contact UCLA Campus APO. Process varies slightly by UC Campus. Policies/Procedures are subject to change upon notice from UCLA Campus APO.*
Forms

Princy Barrios, Life Sciences Divisional Analyst
Peter Kim, Humanities Divisional Analyst
NOTICE OF ENDOWED CHAIR STATUS

NAME: ____________________________________________ DEPARTMENT: ____________________________

(LAST NAME, FIRST) ____________________________________________ SECONDARY: ____________________________

NAME OF CHAIR: ____________________________________________

TYPE OF ENDOWED CHAIR:

☐ PERMANENT APPOINTMENT CHAIR ☐ ADMINISTRATIVE CHAIR
☐ TERM APPOINTMENT CHAIR ☐ DEAN'S CHAIR

TERM OF APPOINTMENT: ____________________________

(START DATE - END DATE)

INSTRUCTIONS: At least three (3) months prior to end of the Endowed Chair appointment, please submit update on status of the Endowed Chair. Provide department's proposed or previously approved plan for the Chair (if applicable). Dean's approval is required before proceeding with proposed plan. If already approved, please submit documentation with this form.

FOR TERM APPOINTMENT CHAIR:

☐ Resignation of Endowed Chair for same candidate in progress:

Donor forthcoming by date ____________________________

☐ Confirmation of end of appointment of Endowed Chair for same candidate.

(Provide reason in comments, e.g. term completed, Endowed Chair for assistant professor, etc.)

FOR PERMANENT APPOINTMENT CHAIR OR ADMINISTRATIVE CHAIR:

Confirmation of end of appointment of Endowed Chair for same candidate for following reasons:

☐ Retirement ☐ Resignation ☐ Stepping Down

(Provide in comments if necessary)

☐ Other: ____________________________ (Provide in comments if necessary)

PROPOSED PLAN:

__________________________________________________________________________

__________________________________________________________________________

COMMENTS:

__________________________________________________________________________

__________________________________________________________________________

DEPARTMENT CHAIR/VICE CHAIR SIGNATURE ________________ DATE __________

DEAN'S COMMENTS (IF ANY):

__________________________________________________________________________

__________________________________________________________________________
REQUEST TO ACCRUE BEYOND 30-SABBATICAL CREDIT LIMIT

FACULTY COMPLETES THIS FORM EACH TIME 30-SABBATICAL CREDIT LIMIT IS ACCRUED

(REFERENCE THE UCLA CALL, APPENDIX 4.)

NAME: ____________________________ DEPARTMENT: ____________________________

SECONDARY DEPARTMENT (FOR SPLIT APPOINTMENT): ____________________________

PRESENT RANK & STEP: ____________________________

QUARTER & YEAR WITH SABBATICAL CREDIT WAS ACCRUED: ____________________________

JUSTIFICATION

Please indicate why you have not had the opportunity to take sabbatical.

SABBATICAL PLAN

Please outline a sabbatical plan that shows credits being reduced at or below the maximum limit of 30.

<table>
<thead>
<tr>
<th>Anticipated Period (Quarter(s) and Academic Year)</th>
<th>Type (Full, In Residence, Partial, etc.)</th>
<th>Anticipated Ending Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXAMPLE: 2019-20 Academic Year</td>
<td>At Full</td>
<td>20</td>
</tr>
</tbody>
</table>

IF THE 30-SABBATICAL CREDITS WERE ACCRUED PRIOR TO THE CURRENT QUARTER, PLEASE INDICATE THE CURRENT SABBATICAL BALANCE (IF NOT APPLICABLE, WRITE "N/A")

PACULTY’S SIGNATURE ____________________________ DATE ________________

PRIMARY DEPARTMENT

I support this request.

Chair’s Signature ____________________________ Date ________________

Dean’s Signature ____________________________ Date ________________

VICE CHANCELLOR’S APPROVAL

VICE CHANCELLOR’S SIGNATURE ____________________________ DATE ________________
New AP Toolkit Preview

Peter Kim, Humanities Divisional Analyst
Thank you for attending!

Sincerely,
College APO