HSCP Annual Certification *(for reviewers)*
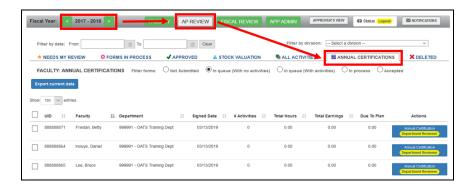
Basics

- **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

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**.
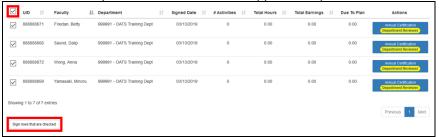

3. Once you are in the Annual Certification screen, you can use the radio buttons to select filtered views of annual certification forms:

- 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 <u>not</u> 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.

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.