Quick Start Guide

Advance Faculty Information Syst....

Basics

Eligibility: Academic Senate faculty members (Ladder, In Residence, Clinical X series) may be eligible to temporarily reduce their percentage of appointment from full time to part time for a specified period of time to accommodate family needs such as childcare, a serious health condition, taking care of a family member, or bereavement.

The faculty member does <u>not</u> have to take a formal leave or have a modification of duties in order to qualify for TRPT unless it is medically necessary.

Planning Temporary Reduction in Percentage of Time (TRPT) The faculty member is required to complete a Memorandum of Understanding (MOU) in ADVANCE. The MOU will specify the expectations for workload, productivity and any other applicable terms. The MOU terms should be discussed, outlined, and agreed upon with their supervisor (e.g., ORU director, division chief) and department chair prior to requesting it in ADVANCE.

Approvals: After the request has been submitted in ADVANCE, the request is reviewed for approval by the department chair, dean or designee, and the vice provost for academic affairs.

Academic Generalist role: Verifies candidate submission and facilitates chair review at the Shared Services level in Advance.

Academic Affairs Specialist role: Verifies generalist submission and facilitates v/a dean / vpaa review at the Specialty Center level in Advance.

Viewing the Temporary Reduction of Percentage in Time Request

From the Overview page:
- Click on Academic Requests link to view active requests.
- On the Type column click on the Reduction in % Time hyperlink to view the request.

From the Candidate Mgmt page:
- After searching for the faculty member, click on the Requests tab, find and click on the Reduction in % Time request.

Managing TRPT Requests: Academic Generalist

- **Once a candidate submits a TRPT request**, an automated email notification will be sent to the academic personnel contact and academic personnel manager assigned to the candidate's home department in Advance.
  - It may be necessary to forward the notification to another academic generalist, as appropriate.
- The generalist should **review the request** for completeness.
- **If the TRPT request is deficient**, the generalist can:
  - Return the request to the candidate for correction via the '**Enable Candidate to edit this Reduction in Time Request**' checkbox.
- **If the request is ready**, the generalist should certify the request via the '**I certify this…**' checkbox.

- The generalist may proceed to **add the chair** to review the request via the following steps:
  - Click on **Approver List link**;
  - Click on **Select Approver button**;
  - **Select chair** and click Add button;
  - Click on **Send button** next to Chair on Approver List to send e-mail notification

- **If the chair sends back** the TRPT request for more information:
  - The generalist receives an automated email notification with chair remarks.
  - The generalist may use the options listed above to address deficiencies.
  - When ready, the generalist can return the request to the chair by recertifying the request and clicking the Send button.

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- **If the chair approves** the request:
  - o The generalist will receive an automated email notification.
  - o If necessary, the generalist may decertify the Chair's approval.
- Once approved**,** the generalist **routes the request** to the Specialty Center level:
  - o Click on the **Manage Request link**;
  - o Click on the **Save button** on Manage Request page.

Approver List   **Manage Request**

Route this Request

Send request to: Specialty Center ▼

Save

Managing TRPT Requests: Academic Affairs Specialist

- **Once a TRPT request has been routed to the Specialty Center level in Advance**, an automated email notification will be sent to all of the academic affairs specialists.
  - o The specialist assigned to the candidate's home department should process the request.
- The specialist should **review the request** for completeness.
- **If the request is deficient**, the specialist can:
  - o Make corrections to the date fields
  - o Contact the generalist to provide documentation offline
  - o Route the request back to Shared Services level in Advance for correction:
    - • Click on the **Manage Request** link
    - • Click on the **Save** button on Manage Request page

Approver List   **Manage Request**

Route this Request

Send request to: Shared Services ▼

Save

- If the request is ready, the specialist may proceed to **add the v/a dean** to review the request via the following steps:
  - o Click on **Approver List link**;
  - o Click on **Select Approver button**;
  - o **Select v/a dean** and click the Add button;
  - o Click on **Send button** next to **v/a dean** on Approver List.

Approver List   Manage Request   Select Approver

	Title	Department		
-	Department Chair	Family Health Care Nursing	Delete	
e M	Dean	School of Nursing	Delete	Send

- **If the v/a dean sends back** the request for more information:
  - o The specialist receives an automated email notification with dean remarks.
  - o The specialist may use the options listed above to address deficiencies.
  - o When ready, the specialist can return the request to the v/a dean by recertifying the request and clicking the Send button.
- **If the** v/a dean **approves** the request:
  - o The specialist will receive an automated email notification.
  - o If necessary, specialist may decertify the v/a dean's approval.
- Once approved by the v/a dean**,** the specialist follows the **same approval process with the vpaa.**
- Once approved by the vpaa, the specialist will click on the **Manage Request** link and click the **"Approval Notification" button** to generate an email to the candidate and others who have reviewed the request.
- When the end date has passed, close the Reduction in % Time Request by clicking the "Complete and close this request" box and press Save.

Report: The TRPT report can be found by clicking the Reports link in Advance.