

Basics

- Compliance with APM 671: Faculty are responsible for submitting annual reports of all Category I and II outside professional activities (OPA) 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 approving annual certifications. Then click the ANNUAL CERTIFICATIONS tab.



Note: if you don't see the screen above, you may be in the Faculty view. Click on the blue **Approver's View button** to see the Approver View.

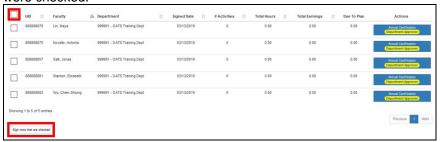


HSCP Annual Certification (for approvers)

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 approval no OPA
- In queue (with activities): Pending your approval with OPA
- In process: Pending submission or review by department reviewer
- Accepted: Approved by Chair/Director
- 4. To review and approve forms in your queue with no activity, select the "In queue (With No Activities)" radio button. You can bulk approve 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 approve all the annual certification forms that were checked.



 To review annual certification forms with activities, select "In queue (With Activities)." Then click the Annual Certification button to review an individual faculty report. Click here for more detailed instructions on how to approve annual certifications.

