Academic Personnel Coordinator Meeting

May 18, 2016
Mop Loan

- Consult with D.O. first before putting language in LOU

July 1 Range Adjustment

- 1.5% range adjustment to X & X’ or REG payroll for academics
- Link to scales is on our website
- It will happen on-time!

Clinical Voluntary Faculty

- Must have end date in anticipation of UC Path implementation – no indefinite end dates on payroll system
  - 3 year initial term; 5 year max reappointment terms
- Are maintained in UC Recruit
New Retirement Tier Effective July 1, 2016

- Two Options:
  - **Option 1** – Pension + 401(k)-style supplement
    - Pension up to PEPRA cap (currently $117,020) plus employer-paid supplement on covered compensation up to IRS cap (currently $265,000)
    - 5-year vesting period
    - 7% employee contribution on covered compensation up to IRS cap
    - 8% employer contribution up to PEPRA cap + 6% employer contribution for unfunded pension liability + supplement % as appropriate
- **Option 2** – 401(k)-style stand-alone benefit
  - 1-year vesting period
  - 7% employee contribution on covered compensation up to IRS cap
  - 8% employer contribution on covered compensation up to IRS cap + 6% for unfunded pension liability

- 90-day initial enrollment period; default into Option 1 if no choice is made

- Employees who choose Option 2 have one-time opportunity to switch to Option 1

- Details can be found at UCnet website
Compensation Plan Administration

- APM-670-80

“Once per fiscal year, the Department Chair or Unit Head shall provide each member of the Plan a written notification of the member’s total annual compensation. This notification shall include:

1) The amount of UCRP-covered salary (X, and if applicable, X’);

2) Which HSCP Salary Scale has been assigned to the Plan member’s APU (X, X’);

3) The amount of negotiated additional compensation (Y); and

4) The payment schedule for Incentive/Bonus compensation (Z) payments and the departmental and/or school assessment policy for Z payments.”
We created a template in FPM to assist you and your chair with writing these annual notifications that include the items listed on the previous page.
Letter Template:

Letter Date:

To: <Faculty name derived from FPM>

From:

Re: Total Negotiated Salary for Fiscal Year 2016-17

Additional Text:

This letter confirms your title, step, and total negotiated salary for the 2016-17 fiscal year.

<Appointment and Salary information derived from FPM>

Payment Schedule: e.g. Quarterly

Should you have any questions, please feel free to contact my office. Thank you.
This letter confirms your title, step, and total negotiated salary for the 2016-17 fiscal year.

Please note that the letter does not reflect your projected incentive Z for the next fiscal year.

Additional Text:

Bwah, bwah, bwah.
Example 1: Letter written prior to June pay computer so the data will reflect the candidate’s proposed title and step (see footnote 1). This person has a Z.
Example 2: Letter written prior to the June pay compute so the data will reflect the candidate's proposed title and step (see footnote 1). This person does not have a Z.
Date: June 30, 2016

To: Dr. Josephine Bruin 3

From: George Washington, M.D.
    Chief, Division of Thoracic Surgery

Re: Total Negotiated Salary for Fiscal Year 2016-17

This letter confirms your title, step, and total negotiated salary for the 2016-17 fiscal year.  

Blah, blah, blah.

<table>
<thead>
<tr>
<th>Title for Fiscal Year 2016-17</th>
<th>ADJUNCT PROF HCOMP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step</td>
<td>1</td>
</tr>
<tr>
<td>Academic Programmatic Unit (APU) Scale</td>
<td>3</td>
</tr>
<tr>
<td>Base (X)</td>
<td>99,100</td>
</tr>
<tr>
<td>Base Increment (X')</td>
<td>29,700</td>
</tr>
<tr>
<td>Negotiated Additional Compensation (Y)</td>
<td>61,798</td>
</tr>
<tr>
<td>Total Negotiated Salary (TNS = X + X' + Y)</td>
<td>190,598</td>
</tr>
<tr>
<td>Affiliate Pay (Disclosure against TNS)</td>
<td>51,152</td>
</tr>
<tr>
<td>UCLA Pay</td>
<td>139,446</td>
</tr>
<tr>
<td>UCLA Salary % Time</td>
<td>87.5%</td>
</tr>
</tbody>
</table>

Blah, blah, blah.

Should you have any questions, please feel free to contact my office. Thank you.

Example 3: Letter written after the June pay compute so the data will reflect the candidate’s current approved title and step (see footnote 1). This person also has a disclosure.

1. Letter reflects current, approved title and step at the time of issuance.
2. Letter documents salary and % of time as of July 1 and does not reflect changes that may occur later in the fiscal year.
Temporary Appointment Forms

- Use the latest version, dated 3/1/16, on our website.
- Please fill out the APU and AAMC codes for paid appointments.
Temporary Appointment Forms

- Use the latest version, dated 3/1/16, on our website.
- Please fill out the APU and AAMC codes for paid appointments.
- What other required documents must be submitted for each type action?

1) Fellowship/Advanced Training
   - Plan Statement.
   - UC Recruit not required (unless the department elects to do so).

2) Interim Appointment
   - Interim appointment should have the same effective date as the proposed permanent appointment.
   - Plan Statement (if paid on plan).
   - UC Recruit required.
   - LOU.

3) Junior Faculty
   - Should have recently completed residency, fellowship, or other advanced training.
   - Should not have prior academic/teaching experience.
   - UC Recruit required.
   - Plan statement (if paid on plan).
   - LOU.
Promotions

- Data Summary pages stay as is (since last advancement for the teaching sections and since last advancement for everything else).
- Department letter should speak to everything since appointment but with an emphasis on what’s new since last advancement.
- Use the new solicitation letter templates that include wording on this involving evaluation of performance since appointment.

Departmental custom and University policy require that intramural and extramural evaluations of the candidate be secured from recognized authorities in order to supplement the institutional record and provide reviewing authorities with an independent assessment.

This review for promotion involves evaluation of performance since appointment, with emphasis on the period of service at the current rank. (If CV does not provide information regarding the candidate’s start dates at rank, please provide dates here). Accordingly, I am writing to request that you provide me with your analysis and evaluation of Dr. CANDIDATE. In responding, please indicate which aspect(s) of the individual's performance you are familiar with, and consider the significance of HIS/HER creative contributions to research and/or administrative activities, and their impact in the field. If HIS/HER work is done with associates and you are acquainted with the research effort, a comment on the contribution or role of Dr. CANDIDATE to the collaborative effort would be of particular value. Information regarding the candidate's teaching effectiveness, as well as the impact of these activities are pertinent. Commentary about clinical/professional performance and competence, and service activities
4-Year Reviews

- Those grandfathered at the Associate and Full rank will undergo 4-Year Reviews instead of 5-Year Reviews.
  - Reviews will be based on teaching duties and evaluations.
  - Dean’s final authority instead of the VC’s.
  - This will also be captured and processed in Opus.
You must provide proof of the position’s advertisement.

Earlier in the recruitment process, the various places where the recruitment would be advertised should have been listed here (ad sources must be entered in order to upload proof).

For OFCCP (Federal audits), copies of actual ads will be needed. This information should be included in the recruitment’s Search Report. Click Upload to include it.

Choose your Ad Source from the drop-down menu. Navigate to your file on your computer. Optionally describe the file and add a comment if you want. Then click Upload file.

NOTE: Make sure you go through each tab on the left hand side of a recruitment and complete each section prior to creating and obtaining approvals for the various reports you run. Each section will tell you which report it hits (see image above).
2. Update Applicant Status

You must update the Status Field for each applicant.

After logging into your Recruitment and choosing the Applicants tab, click “Manage” for each applicant.

For each applicant, click “Update status” and choose a status on the page that appears.
3. Assign Disposition Reason

For applicants who meet the basic qualifications.

From the Applicants tab, click the “Assign Reasons” button, located under “Disposition Reasons.”

For each candidate listed on this page, choose the Disposition Reason from the list, then click the “Done” button in the upper-right corner.

Note: For ongoing searches, we understand that not every applicant will have a disposition reason since a candidate may still be under consideration. However, at the end of your search, before you close it out, you MUST enter a disposition reason for every qualified applicant that was not hired.
4. Select Search Outcome

For every recruitment.

Select an Initial Outcome from the list provided, and click the “Save Changes” button in the lower-left corner.

After every recruitment, go to the Search Info tab, and select “Search Outcome” from the interface column on the left. Then click on the “Select the initial outcome of this search” button.
5. Change Final Status

You must update the approved applicant’s Recruit status.

After logging into your Recruitment and choosing the Applicants tab, click “Update Status” in the main table. This is an alternative method to the one shown earlier.

Choose a status on the popup window that appears.

Note: When you find the candidate you want to propose for appointment, you may update their status in Recruit to either Proposed Offer (this is the ideal status; the one you should use when you provide the candidate an OU) or Accepted Offer. Once the appointment is approved by the Dean or Vice Chancellor and the candidate is hired, you MUST change the candidate's status in Recruit to hired.
6. Archive the Recruitment

Every recruitment must be archived.

At the end of a recruitment, click on the "Recruitments" button in the blue header. Then find the recruitment in question in the list, and click “Make inactive” at the right side of its row.
<table>
<thead>
<tr>
<th></th>
<th>Okay to conduct Search (Faculty Search Committee Checklist #1)</th>
<th>Search Committee (Chair/Members) is formed and position announcement/advertisement is drafted (Faculty Search Committee Checklist #s 2,3,4,&amp;5)</th>
<th>Recruitment Plan Approval (UCLA Academic Recruit - before listing is posted)</th>
<th>Applicant pool is in compliance (Faculty Search Committee Checklist #8)</th>
<th>Applicant shortlist</th>
<th>Approves candidate selection in UCLA Academic Recruit (also Faculty Search Committee Checklist #14)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Regular Series</strong></td>
<td>Search</td>
<td>Email to Vice Dean for Faculty</td>
<td>Chair  →  Vice Dean for Faculty  →  VC EDI</td>
<td>Chair  →  Sr. Assoc Dean AD  →  Vice Dean for Faculty  →  VC EDI</td>
<td></td>
<td>Chair  →  Sr. Assoc Dean AD  →  Vice Dean for Faculty  →  VC EDI</td>
</tr>
<tr>
<td>No Search</td>
<td>Approved search waiver required (VC EDI &amp; VC for Academic Personnel)</td>
<td>N/A</td>
<td>Chair  →  Vice Dean for Faculty  →  VC EDI</td>
<td>Chair  →  Sr. Assoc Dean AD  →  Vice Dean for Faculty  →  VC EDI</td>
<td></td>
<td>Chair  →  Sr. Assoc Dean AD  →  Vice Dean for Faculty  →  VC EDI</td>
</tr>
<tr>
<td><strong>Endowed Chair</strong></td>
<td>Search</td>
<td>Email to Vice Dean for Faculty</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internal Search</td>
<td>Approved search waiver required (VC EDI &amp; VC for Academic Personnel)</td>
<td>N/A</td>
<td></td>
<td>Done outside of UC Recruit</td>
<td></td>
<td></td>
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<tr>
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<td>Approved search waiver required (VC EDI &amp; VC for Academic Personnel)</td>
<td>N/A</td>
<td></td>
<td>Search done as part of faculty search process or N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term Chair</td>
<td>Search</td>
<td>Okay to conduct Search (Faculty Search Committee Checklist #1)</td>
<td>Search Committee (Chair/Members) is formed and position announcement/advertisement is drafted (Faculty Search Committee Checklist #s 2,3,4,5)</td>
<td>Recruitment Plan Approval (UCLA Academic Recruit - before listing is posted)</td>
<td>Applicant pool is in compliance (Faculty Search Committee Checklist #8)</td>
<td>Applicant shortlist</td>
</tr>
<tr>
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</tr>
<tr>
<td>Internal Search</td>
<td>Approved search waiver required (Vice Dean for Faculty)</td>
<td>Email to Vice Dean for Faculty</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>No Search</td>
<td>Approved search waiver required (VC EDI &amp; VC for Academic Personnel)</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In-Residence &amp; Clinical X</td>
<td>Search</td>
<td></td>
<td></td>
<td>Chair or Designee (can be staff member)</td>
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<td>N/A</td>
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<tr>
<td>No Search</td>
<td>Search waiver may be required (Vice Dean for Faculty)</td>
<td>N/A</td>
<td>Chair or Designee (can be staff member)</td>
<td>N/A</td>
<td>N/A</td>
<td>Chair or Academic Designee</td>
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<tr>
<td>Adjunct &amp; HS Clinical</td>
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<td></td>
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<td>N/A</td>
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<tr>
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<td>Waiver of search may be needed (Vice Dean for Faculty)</td>
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<td>Chair or Designee (can be staff member)</td>
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<td>Chair or Academic Designee</td>
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<td>Search</td>
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<td></td>
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<tr>
<td>No Search</td>
<td>Waiver of search may be needed (Vice Dean for Faculty)</td>
<td>N/A</td>
<td>Chair or Designee (can be staff member)</td>
<td>N/A</td>
<td>N/A</td>
<td>Chair or Academic Designee</td>
</tr>
<tr>
<td>Position</td>
<td>Search</td>
<td>Waiver of search</td>
<td>Recruitment Plan Approval (UCLA Academic Recruit - before listing is posted)</td>
<td>Applicant pool is in compliance (Faculty Search Committee Checklist #8)</td>
<td>Applicant shortlist</td>
<td>Approves candidate selection in UCLA Academic Recruit (also Faculty Search Committee Checklist #14)</td>
</tr>
<tr>
<td>----------------------------------------------</td>
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<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Project Scientist</td>
<td>Search</td>
<td>Waiver of search may be needed (VC for Academic Personnel)</td>
<td>Chair or Designee (can be staff member)</td>
<td>N/A</td>
<td>N/A</td>
<td>Chair or Academic Designee</td>
</tr>
<tr>
<td></td>
<td>No Search</td>
<td></td>
<td>Chair or Designee (can be staff member)</td>
<td>N/A</td>
<td>N/A</td>
<td>Chair or Academic Designee</td>
</tr>
<tr>
<td>Coordinator, Administrator, Specialist</td>
<td>Search</td>
<td>Prior approval by VC to establish position needed.</td>
<td>Chair or Designee (can be staff member)</td>
<td>N/A</td>
<td>N/A</td>
<td>Chair or Academic Designee</td>
</tr>
<tr>
<td></td>
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<td>Prior approval by VC to establish position needed. Waiver of search (VC for Academic Personnel)</td>
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<td>N/A</td>
<td>Chair or Academic Designee</td>
</tr>
<tr>
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<td></td>
<td></td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Coming July 1, 2016:
Search Waiver Feature in UC Recruit.

This will be used for all search waiver requests. We will also use this for academic appointments deemed "No Search Required" as stated in the "Guiding Principles Search Waivers for Academic Appointments."
Outline

• Recruit
• Data Cleanup
• Changes to ADB
• Eligibility & Cases
• What happens after data cleanup? Opus phase 2
• Q&A
Data Clean-Up

Opus

Academic History Data

Senate Series: Assoc, Full, SOE

Please look at each row and correct any wrong data. To edit or view actions in progress, click on the gray arrow at the beginning of each row. Be sure to save your work by clicking the "save" button at the end of each row. Green cells are validated. Uncheck the "Validate" checkbox to edit. Gray cells are not editable.

+ Add Person

Department or Organization: Education and Information Studies

Area: All

Search:

<table>
<thead>
<tr>
<th>Division</th>
<th>Department</th>
<th>Area</th>
<th>Specialty</th>
<th>Primary or Additional Dept</th>
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</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Education</td>
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<td>N/A</td>
<td>Primary</td>
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<tr>
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<td>Primary</td>
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<tr>
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<td>Information Studies</td>
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<td>N/A</td>
<td>Primary</td>
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<tr>
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<td>Information Studies</td>
<td>N/A</td>
<td>N/A</td>
<td>Primary</td>
</tr>
</tbody>
</table>
Questions? Click Help

Still need answers? Email us at opushelp@ucla.edu
What’s up with that Red Square?

- Red square = Data from ADB
- **All appointments should have a red square**
- No red square = Data from EDB
- If there are 2 rows for a person and one is missing the red square, remove that row
- If you only see one row for a person and it doesn’t have the red square:
  - If it’s a mistake, remove the row
  - If it should be in ADB, but you don’t see an ADB row, contact Arlene
Area, Specialty, & Affiliates

- Opus is updating the SOM organizational hierarchy to better match your understanding of where faculty are based.
- Dept. or division codes provided by ADB are mapped to a department, area, or specialty in Opus.
- As long as you see your people, don’t worry too much about what Area they display in for now.
- Don’t edit Area & Specialty until we have updated the org. hierarchy.
Area, Specialty, & Affiliates

- One row for appointees that are based at an affiliate and have a WOS appt. in CHS.
- Appt. percentage should reflect the percentage at the affiliate
- May be special cases where we need to see 2 rows (e.g. a person is split between multiple affiliates or between an affiliate and CHS) – check with Arlene
- Senate appts. validated at less that 100% will raise eyebrows!
Action Dates & Outcomes

• Used to calculate eligibility

• Only populated if the effective date is in the past (e.g. if the Appraisal is effective 7/1/16, you won’t see any data in those fields until 7/1/16)

• Deferred & Accelerated fields correspond to the Last Advancement Action
8 Year Clock

- Credited Service = Months / Years on the clock
- For Researchers, service is counted from 7/1/13
- If you have someone who has had both a Research & Professorial appt., the “credits” will be different for each.
- If TOC credits aren’t populated, call APO – they will have to add this info before you can enter TOC time actually used by the faculty member

Future Appointments

• If a person is up for an action this year or if the appointment has been updated (e.g. %) this year, you will see both a current and a “future” appt. row for the person.

• If you know in advance how the data will be updated for the future appt., then fill in the data and validate both rows.

• A briefcase indicates a case in progress.
Changes to ADB
Candidates with multiple departments within SOM and/or with multiple actions will be logged in separately to ensure that ADB syncs with Opus correctly. When checking ADB for your current actions, please check the Current Appt Field to ensure that the page you are looking at is the correct action for your department. The Current Appt field will include the candidate's title code for his/her appointment in your department, your department's payroll code, and then the current appointment dates that this proposed action is linked to (think of it as the "from" title).

Example 1: This page is for a proposed promotion action for Dr. Bruin in the Department of DOSM (Dept code 1400) where he is currently Associate Professor-in-Residence on the MCP plan (title code 1717).
Example 2: This page is for a proposed promotion action for Dr. Bruin in the Department of Med Center (Dept code 2875) where he is currently Associate Professor-in-Residence without salary and not on the plan (title code -3271).
We are also correcting last advancement actions so that the correct information shows up on the academic cleanup.

Example 3: This page is for the promotion action for Dr. Bruin in the Department of DOSM (Dept code 1400) where he was Assistant Professor-in-Residence on the plan (title code 1724).
Example 4: We are also correcting the type of action related to a candidate per department. In this example, Dr. Bruin currently holds a primary appointment in the Department of DOSM (Dept code 1400) as Assistant Professor-in-Residence on the plan (title code 1724). He received a joint appointment in the Department of Med Center. This page tells Opus that a joint appointment action effective 2/1/14 was approved but doesn't change anything for the home department.

In other words, this says: Dr. Joe Bruin, currently Assistant Professor-in-Residence on the plan with title code 1724, in the Department of DOSM (Dept code 1400) was approved for a joint appointment, effective 2/1/14.

How does it look for the secondary department?
This page shows how the action is reflected for the proposed additional department. In this case, Dr. Bruin was approved for an appointment as Assistant Professor-in-Residence, without salary, and not on the plan in the Department of Med Center, effective 2/1/14. NOTE that there isn't anything in the Current Appt field. This is because there is no "current appointment" (AKA "from") to link this action too. It is considered a brand new action in the Department of Med Center.
Remember: We will only log in the action that pertains to a department in SOM. Thus, for Dr. Josephine Bruin's merit, we only logged in the action that is linked to her appointment in the Department of DOSM (Dept code 1400).
Eligibility & Cases
Eligibility

Uses data from the data cleanup screen

Shows “happy path” for next 5 years based on current info

Filter by Academic Year, Action, or Series

Show and hide columns

Search for a specific person

Export to excel

Once you’ve validated a person, check out their eligibility – Let us know what we can improve and if you find any errors!
## Cases

- Shows reviews in progress
- Read only for SOM
- No completed cases for SOM
- Filter by action type
- Show and hide columns
- Search for a specific person
- Export to excel

“Current” fields actually show “Future” data – we’re working on this....
What’s Next?
Opus is Where you start a Case

- Opus sends data to ADB instead of receiving data from ADB
- Data clean up complete (except for volunteers)
- Start a case in Opus
- Case contents will be in Opus (C.V.s, letters, etc. will be uploaded into system)
- Review Committees, Chairs, Deans will review case online
- Case will be routed to reviewing agencies according to campus policy
- Subsequent releases introduce new validation rules, and fielded data rather than uploads
Case Summary (Cover Sheet)

**Candidate**

Dumbledore, Albus Wohło Bryan  
Hire Date: 2/32/1034

**Proposed Action**

- Action Type: Merit Advancement
- Effective Date: 7/1/2016
- Years Accelerated: 0
- Years Deferred: 1

<table>
<thead>
<tr>
<th>Case Summary</th>
<th>Current Appointment</th>
<th>Proposed Appointment</th>
<th>Approved Appointment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title Code, Title</strong></td>
<td>1200, Associate Professor</td>
<td>1200, Associate Professor</td>
<td>1200, Associate Professor</td>
</tr>
<tr>
<td><strong>Series, Rank, Step</strong></td>
<td>Regular Professor, Associate, 2 Years at Series: 12 Years at Rank: 4 Years at Step: 2</td>
<td>Regular Professor, Associate, 3</td>
<td>Regular Professor, Associate</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>Indefinite</td>
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<td>Indefinite</td>
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<tr>
<td><strong>Primary School, Division, Dept, Area, Specialty</strong></td>
<td>School of Theater, Film, and Television, Film Department</td>
<td>School of Theater, Film, and Television, Film Department</td>
<td>School of Theater, Film, and Department</td>
</tr>
<tr>
<td></td>
<td>100% time</td>
<td>100% time</td>
<td>100% time</td>
</tr>
</tbody>
</table>
Upload Documents

Upload Documents

Type of Document

1. Committee Report
2. Department Report
3. Chair's Letter

Department Voting Body

What is the composition of the voting body?
- Adheres to Bylaw 55
- CR vote extended to:
  - All Senate Faculty
  - Specific Senate Faculty Groups

Bylaw 55 language
View Documents
Transition to Opus phase 2

- The SOM goal for completion of academic clean-up is **6/30/16**. Timely completion by this date will allow us to move into the next phase of Opus and will ensure that we don't have to validate AY16-17 appointments.
- Once we complete the ADB transition, you’ll **create a case in Opus & add the proposed fields (this is what the rest of campus is doing)**.
- No uploads at this point – just proposed and approved fields
- **Once we are ready with phase 2**
  - If the case is still at the dept. and has not gone to committee – the review process & documents are in Opus
  - If the case has already gone to committee, when we launch phase 2. the case will be completed using the existing form (no uploads, paper case goes through the review process outside Opus)
Q & A
Thank You