

Academic Forms On-line Request for an Academic Appointment under a Visiting Title

General Guidelines:

This information explains the procedures and routing of requests for academic appointments under a Visiting title.

Please refer to Academic Personnel Manual Section [APM 230](#) for criteria and policy regarding academic appointments under a Visiting title before you begin. Currently, this form cannot be used for Visiting Post-doc Scholars (UCD 230).

You may use the Visiting request form from Forms On-Line for any request for a Visiting appointment that would formerly be requested via letter.

The total period of consecutive service with a Visiting title cannot exceed two years.

Salary is at a negotiated rate, but should be within the salary range on the UC salary scale for the title series, and within the rank the person holds at their home institution, or commensurate with experience.

Procedures

Initiating Forms:

Administrative Staff may initiate and edit forms for Visiting appointments, and save drafts.

Staff, Department Chairs and Deans also have access to two additional tabs, **Review** and **Reports**.

First, log into the Forms On-Line system with a campus ID and Kerberos password.

After initial login, go to the **Forms** tab in the gold ribbon at the top of the page.



Each of these functions may be performed by selecting the appropriate tab in the gold ribbon at the top of the page.

- Select **Forms** when you want to create a new form
- Select **Review** when you want to review a form already created and send it to the next review/approval level
- Select **Reports** when you want to view all the actions for a particular type of form for a specific department in a given year.

Under the heading **Academic Personnel Forms for Staff** select

[Request for Visiting Appointment](#)

This link will take you to the template. Fill out all fields and attach a CV or Biography via the final box. Drop down menus are provided for the Department field, Title and Annual Basis/Paid fields. Note that 1/9th title codes and the Basis/Paid Over fields are used for those who are being appointed for less than a full year on a quarter basis. Please see the [Basis/Paid Over Chart for Academic Appointees](#) for Payroll Begin and End dates for 9/9 Quarters.

After the form has been filled out, you may save it as a [Draft](#). Drafts can be accessed by clicking the **Review** tab at the top of the screen and by then clicking on either the [_Draft](#) or [_Edit](#) link.

After the form has been completed, the form must then be **submitted**. Click the [Submit](#) text in blue at the bottom of the form.

[Submit](#) [Draft](#) [Undo Changes](#)

This action will send the form to the next level of review, and an email is generated to alert the person that an action has been submitted to him/her for their review and action. The screen will 'reload' and you will see a copy of the completed form. You may then save your document to your computer by clicking [Download document](#) at the top of the form. A template of the form that was filled out may also be created by clicking [Template new request](#) at the top of the form. This feature can be used if more than one time period or type of leave needs to be submitted.

[Download document](#) [Template new request](#)

Once the form has been submitted, it will be routed to your Department Chair, Dean's Analyst and Dean for final approval. An email is generated to the form initiator and all staff in the routing chain when a final approval has been made.

Reviewing Forms

If you are a **Reviewer, Department Chair, Dean** or other approving administrator, select the **REVIEW** tab in the gold ribbon at the top of the screen. All reviewer lists may be sorted by the type of form, by specific department, or by person.

Use the drop down boxes to:

- View Form: to choose a specific type of form
- View Department: to select by a specific department
- View Person: to sort by records for an individual

If no forms have been submitted using the Forms On-Line system, then no records will appear. The list may also be downloaded by clicking on the [Download Records List](#) next to the update button.

View Action Items View Pending Items View All Other Items

View Form: View Department:

View Person: Include Past Faculty Names

[Download Records List](#)

View Action Items

You may select actions that require your review and submission only by checking the View Action Items box at the top of the screen, then clicking the button. A list of actions for your review will appear containing the name, status, type of form submitted, last update date and a more detailed description of the form request. Select the [View](#) link at the right side of the row for the person you would like to review. This will bring up the form for your review.



Returning a Form for Correction or Information

Users may return the form for additional information by selecting [Return](#)* at the bottom of the form if the submitted form is not complete or if changes to the form are required. Please note that all returns require a comment in the [Comments](#) field explaining the reason for the return of the form before the action can occur. An email is generated when a form is returned alerting the submitter that action is required.


After corrections are submitted, the administrative staff member may then [Submit](#) the form to the Department Chair for review. The Department Chair may then [Submit](#) the form to the Dean's Office staff, or [Return](#)* the form to the administrative staff for further corrections or information. Dean's office staff will then review and [Submit](#) or [Return](#)* the form, then the Dean will review and either [Submit](#), [Approve](#) or [Return](#)* the form. Dean's office staff may also

edit the form for correction. If edits occur, an email alert is generated to the faculty person and all department staff previously in the routing chain.

View Pending Items

You may also view a list of actions you have reviewed and submitted but have not yet been approved, by checking the View Pending Items box at the top of the page, then clicking the  button. A list of actions will appear. Note that these actions will show a status of En Route in the Status column. Select the [View](#) action link at the right side of the row for the person you would like to review. This will bring up the form for your review. At the bottom of the form you will see **[+/-] View Routing History**. Click on the **[+/-]** symbol to open (or close) a table outlining the routing history of the form. This table shows the date and time the form was routed to the next person, if the action was submitted, reviewed, returned, denied or approved by a user, and where the form currently resides in the routing system. You may return to your list of actions by clicking the  button again.

View All Other Items

A list of completed forms may be viewed by checking the View All Other Items box at the top of the page, then clicking the  button. A list of actions will appear. This will allow you to review all past actions that have been reviewed and approved and select specific forms if needed.

Creating Reports

Select the Reports tab at the top of the screen in the Gold ribbon.

Review Reports

This will allow you to run reports by department if you are located in a department, or by College/School if you are located in a Dean's office or central administrative office. Reports may be created for a particular year, or for a particular type of report. First, select the department or college from the drop down menu. For a report on Outside Professional Activities, enter the year of the report you would like to create. Next, select [View](#), [Excel](#) or [Email*](#) to create the report and view it on-line, download it to Excel, or Email it to another office. Similar reports may be created for other types of forms.