November 5, 2020

To: Departmental Business Officers and Academic Personnel Analysts (via SBADM-L)

From: Cindy Doherty, Academic Personnel Director

Re: Interim process for Associate Appointments

Academic Personnel has had a long-term goal of moving all academic employment processes off of paper and into the AP Folio online system. Unfortunately, there were a number of processes that were still being managed on paper prior to the COVID pandemic and move to remote work. While some workarounds were instituted for Fall quarter appointments, they were ill defined, and for lack of another term, clunky. The Associate appointment process was particularly problematic due to the number of offices involved in the review process. Academic Personnel has begun the work to move the process to AP Folio however this will not occur in time for Winter or Spring quarter appointment processing. In the mean-time, in consultation with the Academic Senate and the Graduate Division, an interim process has been developed to allow electronic processing of Associate appointments. Departments will need to submit Associate appointments as follows:

- Complete the Associate appointment form and obtain departmental approval.

- Save all required documentation (see list on the appointment form) into a Google Drive folder.

  - Google drive information and help are available here:
    https://www.connect.ucsb.edu/usage/connect-g-suite-drive-file-sharing
    https://support.google.com/a/users/answer/9310246.

  - Share the folder with financial@graddiv.ucsb.edu in the Graduate Division.

  - Create a file for the appointee, use the naming convention of *Last name_First name_year _quarter__dept* (e.g. Smith_Jane_2020-21_Winter_HIST) and save the file to the folder.

- Route the Associate appointment form to the Graduate Division (financial@graddiv.ucsb.edu) using DocuSign (the Graduate Division will add the routing for other offices in the review process).

  - DocuSign instructions and help are available at: https://docusign.lsit.ucsb.

- o   Include the name of the folder on Google drive in the Docusign comments.

Once the Graduate Division has received the Associate appointment form via Docusign they will copy the individual's folder from the departmental Google drive into a shared Google drive that will facilitate the rest of the review process by central offices.

We understand this process is not ideal, but it does provide an interim process for Winter and Spring quarters that will allow the appointment cases to be processed in a more timely, consistent manner. Please let us know if you experience problems so that we can fine-tune the process if needed.

We appreciate your collaboration and cooperation as we continue to work through these unprecedented times.

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