August 22, 2019

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

From: Cindy Doherty, Academic Personnel Director

Re: Updates to *AP Folio* leave processing module for academic employees

As you are aware, the new *AP Folio* module for processing academic employee leaves was recently rolled out to the campus. Based on feedback and suggestions from department and college users, the following changes are being implemented and will be deployed the week of September 3, 2019.

Routing Changes

In order to simplify and streamline the process, the routing will be modified as follows:

Academic Employee > Department Analyst > Department Chair > College Analyst* > Dean* > AP

*for actions requiring college action

Department Chairs will have a choice to "**Route Forward**" or to "**Return to Department Analyst**":

- "**Route Forward**" will route to the next queue, instead of back to the Department Analyst, and should be used when the Chair is approving the action with no additional information required.
- "**Return to Department Analyst**" should be used if additional information is required for the Chair to properly review the request.
- Once the Department Analyst makes the necessary changes, the Department Chair will need to review again and route forward if endorsing the request.

College Analysts will have a choice to "**Route Forward**" or to "**Return to Department Analyst**":

- "**Route Forward**" will route the request to the Dean.
- "**Return to Department Analyst**" should be used if additional information is required for the College Analyst to properly prepare the request for the Dean's review.
- College Analysts will retain the ability to edit the leave request on behalf of the department if the necessary changes can be appropriately addressed without returning the request to the department.
- Once the Department Analyst makes the necessary changes, the Department Chair will need to review again and route forward if endorsing the request.
- College Analyst reviews again and routes forward to the Dean.

Deans will have a choice to "**Route Forward**" or to "**Return to College Analyst**":

- "**Return to College Analyst**" should be used if additional information is required for the Dean to properly review the request.
- College Analysts will make a decision on whether or not "Return to Department Analyst" is necessary. College Analysts will retain the ability to edit the leave request on behalf of the department if the necessary changes can be appropriately addressed without returning the request to the department.
- Once the Department Analyst makes the necessary changes, the Department Chair will need to review again and route forward if endorsing the request.
- College Analyst reviews again and routes forward to the Dean.
- Dean reviews again and routes forward in approving or endorsing.

Inbox View

Department and College Analysts inboxes will now have the following sections:

- My Inbox
    - This section will show all inbound leave requests, as submitted from the academic employee
    - This section will also show the leave requests that have been returned from the college, with notes explaining why it has been returned and what is needed to continue the review.
- Chair's/Dean's Inbox
- Department Analysts will see requests that are in the Chair's inbox. The College Analysts will see the Dean's Inbox.

All leave requests by year

- Analysts will have an additional tab that will allow them to see a list of all leave requests processed, by year, along with the status of the request.

We appreciate your continued feedback and suggestions as we continue to refine the leave processing module.

Thank you

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