

Date: September 1, 2023

To: Department Business Officers and Staff, Academic Department Chairs and Deans, and Academic Unit Directors

From: Dana Mastro
Associate Vice Chancellor for Personnel Office

Re: Eligibility for Merit and Promotion Reviews: Researchers, Project Scientists, Specialists, and Academic Coordinators

The lists of non-senate academic employees who are eligible for merits and promotions during the 2023-24 academic personnel review cycle (effective July 1, 2024) in the titles noted above, are now available. Deadlines for departmental submission of cases are:

Researchers:	Fri, March 1, 2024
Specialists and Project Scientists:	Mon, April 1, 2024
Academic Coordinators:	Wed, May 1, 2024

To access your eligibility list, please log on to AP Folio via the Academic Personnel web site and click on the ***Eligibility Listing*** link. Tabs will then appear for each category of employees. Chairs and Directors as well as any staff within your office who have access to the online cases processing system have access to the eligibility information. In addition to viewing the lists you may download them to Excel or save PDF versions.

The July 1, 2024 Eligibility Listing page for each employee category includes the following sections:

Employees eligible for review to be effective 7/1/2024

Listed members are eligible for review based on their years at rank, step, or since last review. Mandatory reviews are so designated and may not be deferred. An action must be selected for each eligible employee. Departments are encouraged to enter selections by January 31 to assist with planning.

All other employees in your department

These employees are not eligible for review based on years at rank, step, or since last review. However, Department Chairs and Directors should consider the performance since last review of each person on this list for possible acceleration, if justified.

Please note: A change was recently made so that Unit Directors now have read-only access to view cases in AP Folio, similar to access for Department Chairs.

As a reminder, Deferrals are no longer automatic for Academic Researchers (Researcher, Project Scientist, and Specialist series.) Please refer to the January 23, 2020 memo for the case deferral process.

[https://ap.ucsb.edu/news.and.announcements/memos/?1.23.2020.Case.Deferral.Process
.for.Academic.Researchers](https://ap.ucsb.edu/news.and.announcements/memos/?1.23.2020.Case.Deferral.Process.for.Academic.Researchers)

If you have any questions or see any discrepancies related to the eligibility information, please contact the staff in Academic Personnel as follows:

Academic Coordinator eligibility: Mira Lázaro at mslaza@ucsb.edu or Lia Cabello at lia.cabello@ucsb.edu.

Researcher, Project Scientist, or Specialist eligibility: Joanna Kettmann at joanna.kettmann@ucsb.edu.

Technical questions related to use of the site: help@aait.ucsb.edu.

In order to ensure that submission deadlines are met, please begin meeting with your academic employees in a timely manner to advise each of them about moving forward with or deferring their cases.