

How to Access Faculty Annual Certification Reports and Prior Approval Forms

APM 025 Annual Certification Reports

Department chairs, college/divisional deans, and staff with OATS access can review faculty APM 025 Annual Reports in OATS. Faculty reports include all Category I and II activities recorded for the reporting period.

Log into OATS at <https://ucsb.ucoats.org> and navigate to the **fiscal year** using the buttons on the upper left side of your screen.

- Reviewers (department and college/divisional staff)
 1. Click on **AP REVIEW**
 2. Click on **ANNUAL CERTIFICATIONS** and filter by “Accepted” or “In Process.”
 - To view faculty who have not yet certified their activities for the fiscal year, filter by “Not Submitted.”
 3. Click on Annual Certification (blue buttons) to view submitted forms and their statuses, for example:



- Approvers (Chairs and Deans)
 1. Click on **ANNUAL CERTIFICATIONS** and filter by “Accepted” or “In Process.”
 - To view faculty who have not yet certified their activities for the fiscal year, filter by “Not Submitted.”
 2. Click on Annual Certification (blue field) to view and process, if needed.

Accessing Faculty Prior Approval Forms

Reviewers and Approvers may access Category I and Student Involvement **Prior Approval** forms in OATS. These forms include all information related to the prior approval request and approval, including notes and attachments, if applicable.

Log into OATS, click to the appropriate **fiscal year**.

- Reviewers
 1. Click on **AP REVIEW**
 2. Click on “All Activities” or “Approved.” Faculty are listed alphabetically.
 3. Click on the Category I or Student Involvement Form to view it.
- Approvers (Chairs and Deans)
 1. Click on **REVIEW/APPROVAL**
 2. Click on “All Activities” or “Approved” or search the list by faculty name.
 3. Click on the Category I or Student Involvement Form to view it.