

UC OATS - Outside Activity Tracking System

For Reviewers: APM 025 Annual Certification processing

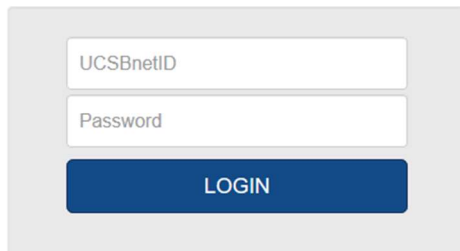
1. Go to: <https://ucsb.ucoats.org/>
2. Click on “Log in to OATS” green button



3. Sign in using your UCSBnetID and Password

UC SANTA BARBARA

Authentication Service

A login form with two input fields: "UCSBnetID" and "Password". Below the fields is a blue button labeled "LOGIN".

4. Click on “AP Review” button



5. Locate the reporting year by clicking arrows, as needed



6. Click on the Annual Certifications tab

 **ANNUAL CERTIFICATIONS**

The default filter will be set to “In process” - You must change the filter setting (see #7)

- Do NOT use the “NEEDS MY REVIEW” tab

~~★ NEEDS MY REVIEW~~

7. Click the filter radio button for one of the “In queue” options:

IN QUEUE: Without activities With activities

8. Review as needed; you may click on the form to open each form and review details, if desired.



9. Bulk review to approve multiple forms at once by selecting individual checkboxes along the left of your screen or by selecting the checkbox above the line to select the column:



10. Click on the “Sign rows that are checked” button:



11. If approving multiple forms at once, a pop up will indicate the number of forms to be approved. You will see “You are about to sign __ forms.”

12. Click on the Submit Action green button.



Please note: Faculty jointly appointed in two or more departments fill out and submit one annual report. Forms route serially rather than simultaneously as follows:

Primary Department AP Analyst > **Primary** Department Chair > **Secondary** Department AP Analyst > **Secondary** Department Chair