Faculty Success Data Entry Procedure

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How to update Faculty Success after a member has completed a review

This process will require you to use both ACRS and Faculty Success to complete the data entry.

To begin you will need to run a report or manually check in ACRS if the case(s) is at the following step: "Candidate Notification-Notification Letter."

Once at this step you will need to download all the ACRS documents pertaining to the case prior to moving the case forward. Once the case moves to" APO (Close case)", you will no longer have access to these documents.

I recommend saving the ACRS documents in a box folder to reference them as needed. Documents that you will be referencing often: the notification letter, case analysis, transmittal letter, Deans memo, Redacted CAP Report and the votes page.

Log into Faculty Success.

Type in the faculty members name that you would like to update. Once you are in their file, under General Information, click on UCM Employment History.

General Information

Personal Information (Public)

Personal Information (Confidential)

Academic Personnel Office - Permanent Data UCM Employment History | Leaves/Sabbaticals/ASMD

UCM Administrative Positions

External Professional Employment

External Professional Activities/Consulting

Licensures and Certifications

Professional Development

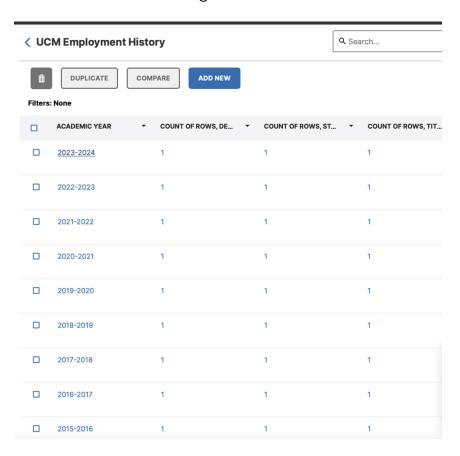
Professional Memberships

Education

Awards and Honors

Diversity Activities

Once you are on the UCM Employment History page, please select the AY in which the review is being conducted.



At this point, please review the index to determine the appropriate part of the procedure to provide specific guidance.

How to Process a Short Merit in Faculty Success

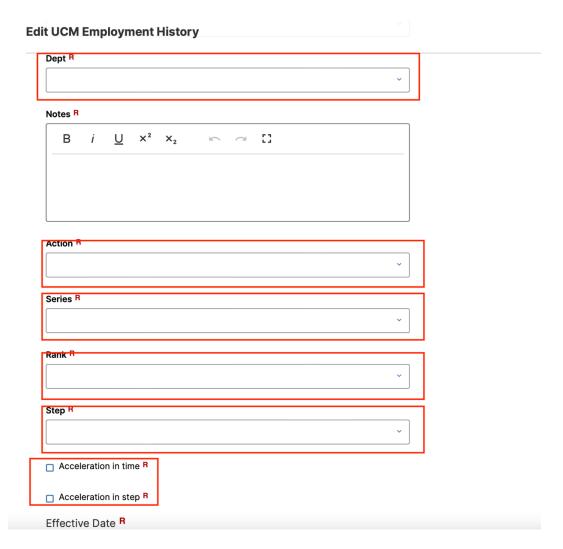
To enter the outcome of the review, scroll down to the Action/Decision section. You will need to reference the case documents from ACRS to complete the following fields. (Reference the screenshot below)

on/Decision			
Outcome R			
Outcome "		~	
AVPAP R			
		•	
Provost R			
		·	
VPAP R			
		·)	
CAP R			
		·	
CAP Mtg R			
Month R	Day ^R Year ^R		
	·		
Dean R]
		~	
Dept R			, 1

All cells that are outlined in red will need to be completed. We are documenting if each committee agreed or disagreed with the proposed action.

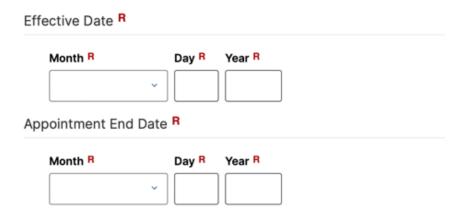
Outcome: What was the final decision according to the notification letter? Dean: Refer to the Dean's memo, did they agree with the proposed action? Dept: Refer to the Transmittal Letter. Did they agree with the proposed action?

Short Merits end with the Dean's Memo; therefore you will skip the sections that are not outlined in red.



Above shows a screenshot that needs to capture the action that was approved.

Action: Select the type of review that was conducted.
Series/Rank/Step: Select the appropriate items that reflect the approved action.
**If the review was an acceleration: please check if it was an acceleration in time, step, or both.



Please add the date when the approved action is effective.

** Assistant Professors and Assistant Teaching Professors/LPSOE will have an appointment end date. Associate and Full Professors will not have an appointment end date. Please refer to the notification letter for specific dates.

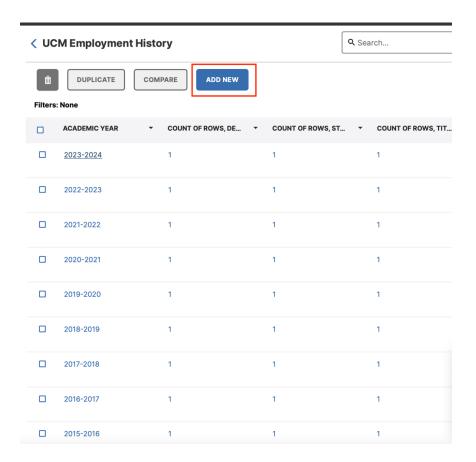
If this is an Associate or Full Professor, scroll down until you reach the Mandatory 5 Year Review Date section. (see below). The date entered should be 5 years from the current effective date.

Mandatory 5 Year Review Date R Month R Day R Year R

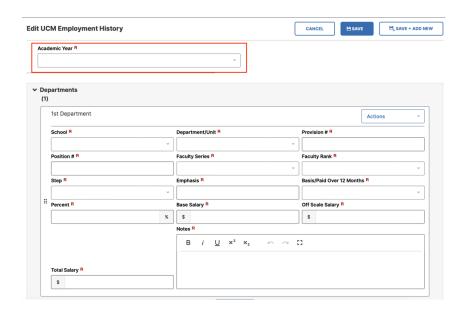
PRESS SAVE

You have now completed updating the current AY.

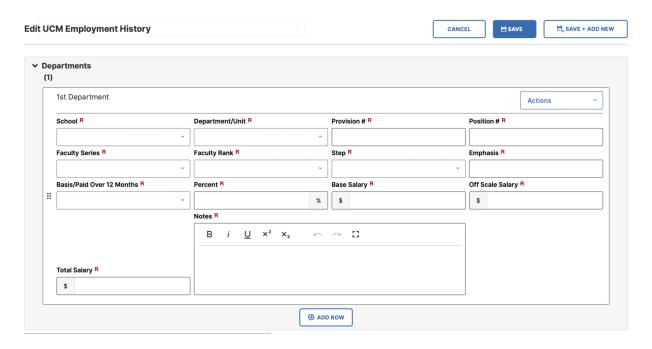
Next, you need to add the upcoming AY. To do so click on the Add New Button.



Once the new window opens type in the new AY year in the field. A list of possible years will populate, and you can click on the year you need. **Press save.**



Once you press save you will return to the list of AY year links. Open the new AY you just created in a separate window. In another window open the current AY. For example, we are currently in AY 23-24 and importing data in AY 24-25. You will want these two years side by side so that you can easily copy and paste some of the information into the new AY.

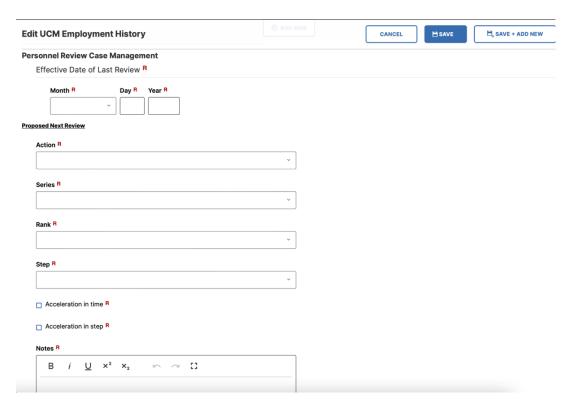


Fields to copy from the previous AY year: School, Department, Provision #, Position #, Emphasis, Base/Paid over 12 months, Percent.

Fields to add the approved action details: Faculty Series, Faculty Rank, Step, Base Salary, Off Scale Salary, Total Salary. This information can be found on the notification letter and Dean's salary memo.

In the Notes field please type the action, outcome and effective date. For example," 7/1/25 Merit to Associate Professor, Step III." This information will populate in the history card once the employment history section is saved.

Just below the Department information, you will find the following fields. Please complete each field. Please note that this information will be based on what the next normal advancement action would be. Optional: Acceleration in time/in step. This should only be checked if it applies to the review.



Lastly, add the effective date of the Next Review. This can be found in the MAPP:

For Senate Faculty:

https://academicpersonnel.ucmerced.edu/sites/academicpersonnel.ucmerced.edu/files/page/documents/mapp 2014 3.pdf

LPSOE and LSOE:

https://academicpersonnel.ucmerced.edu/sites/academicpersonnel.ucmerced.edu/files/page/documents/mapp_2054_3.pdf

Effective Date of N	Next Review R
Month R	Day R Year R
	•

How to Process a Full Merit in Faculty Success

To enter the outcome of the review, scroll down to the Action/Decision section. You will need to reference the case documents from ACRS to complete the following fields. (Reference the screenshot below)

n/Decision				
Outcome R				
AVPAP R				
			·	
Provost R				
			<u> </u>	
VPAP R				
			Ÿ	
CAP R				
			~	
CAP Mtg R				
Month R	Day R Year R			
Dean ^R				
			~	

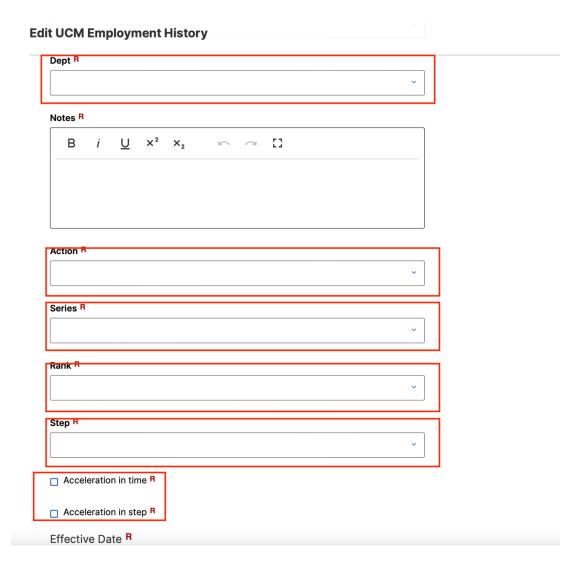
All cells that are outlined in red will need to be completed. We are documenting if each committee agreed or disagreed with the proposed action.

Outcome: What was the final decision according to the notification letter? VPAP: Refer to the notification letter, did they agree with the proposed action? CAP: Refer to the Redacted CAP Report, did they agree with the proposed action?

CAP Meeting: Add the date that is listed on the Redacted CAP Report.

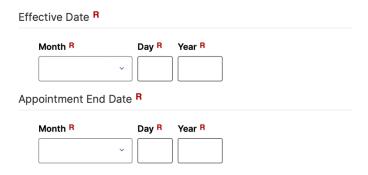
Dean: Refer to the Dean's memo, did they agree with the proposed action?

Dept: Refer to the Transmittal Letter. Did they agree with the proposed action?



Above shows a screenshot that needs to capture the action that was approved.

Action: Select the type of review that was conducted.
Series/Rank/Step: Select the appropriate items that reflect the approved action.
**If the review was an acceleration: please check if it was an acceleration in time, step or both.



Please add the date that the approved action is effective.

** Assistant Professors and Assistant Teaching Professors/LPSOE will have an appointment end date. Associate and Full Professors will not have an appointment end date. Please refer to the notification letter for specific dates.

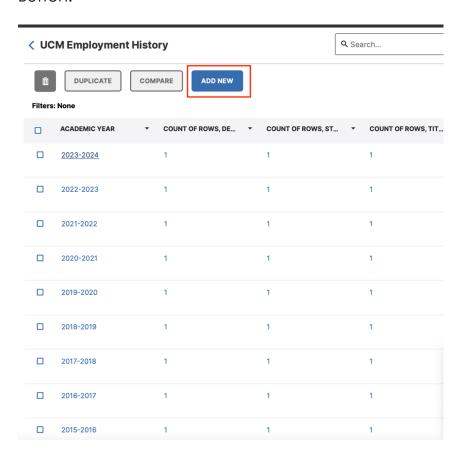
If this is an Associate or Full Professor, scroll down until you reach the Mandatory 5 Year Review Date section. (see below). The date entered should be 5 years from the current effective date.

Mandatory 5 Year Review Date R Month R Day R Year R

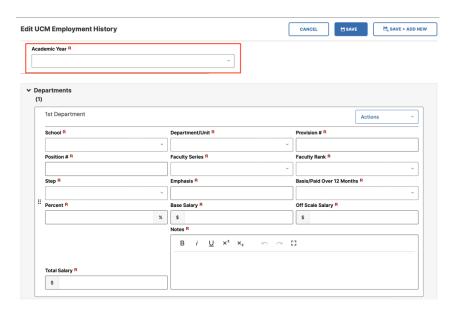
PRESS SAVE

You have now completed updating the current AY.

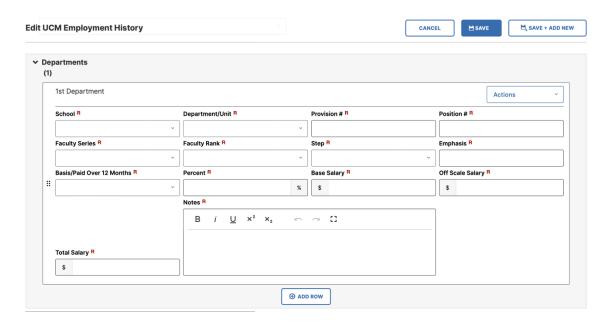
Next, you need to add the upcoming AY. To do so click on the Add New Button.



Once the new window opens type in the new AY year in the field. A list of possible years will populate, and you can click on the year you need. Then press save.



Once you press save you will return to the list of AY year links. Open the new AY you just created in a separate window. In another window open the current AY. For example, we are currently in AY 23-24 and importing data in AY 24-25. You will want these two years side by side so that you can easily copy and paste some of the information into the new AY.

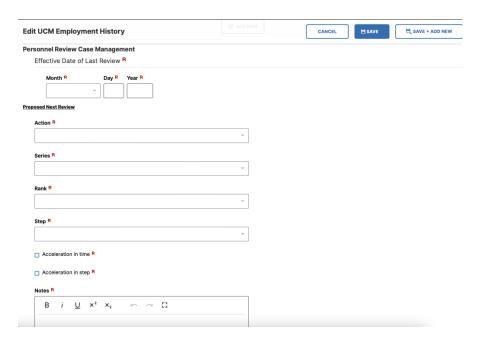


Fields to copy from the previous AY year: School, Department, Provision #, Position #, Emphasis, Base/Paid over 12 months, Percent.

Fields to add the approved action details: Faculty Series, Faculty Rank, Step, Base Salary, Off Scale Salary, Total Salary. This information can be found on the notification letter and dean's salary memo.

In the Notes field please type the action, outcome, and effective date. For example, "7/1/25 Merit to Associate Professor, Step III." This information will populate in the history card once the employment history section is saved.

Just below the Department information, you will find the following fields. Please complete each field. Please note that this information will be based on what the next normal advancement action would be. Optional: Acceleration in time/in step. This should only be checked if it applies to the review.



Lastly, add the effective date of the Next Review. This can be found in the MAPP:

For Senate Faculty:

https://academicpersonnel.ucmerced.edu/sites/academicpersonnel.ucmerced.edu/files/page/documents/mapp_2014_3.pdf

LPSOE and LSOE:

https://academicpersonnel.ucmerced.edu/sites/academicpersonnel.ucmerced.edu/files/page/documents/mapp_2054_3.pdf



How to Process an MCA in Faculty Success

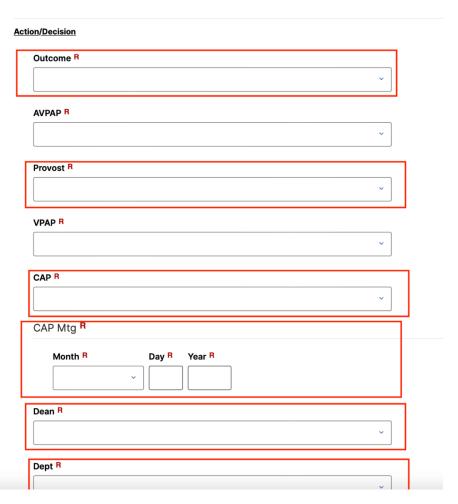
In the current AY year, scroll down to nearly the bottom until you reach the following fields:

Mid Career Appraisal (MCA) AY R MCA Rating R

Use the MCA notification letter to complete the two fields listed above.

How to Process a Promotion in Faculty Success

To enter the outcome of the review, scroll down to the Action/Decision section. You will need to reference the case documents from ACRS to complete the following fields. (Reference the screenshot below)



All cells that are outlined in red will need to be completed. We are documenting if each committee agreed or disagreed with the proposed action.

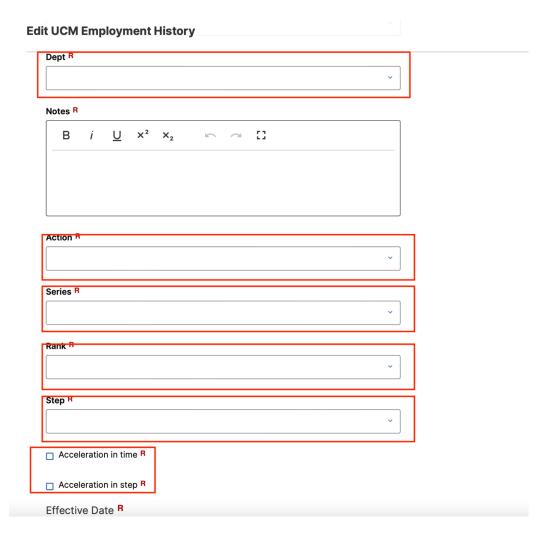
Outcome: What was the final decision according to the notification letter? Provost: Refer to the notification letter, did they agree with the proposed action?

CAP: Refer to the Redacted CAP Report, did they agree with the proposed action?

CAP Meeting: Add the date that is listed on the Redacted CAP Report.

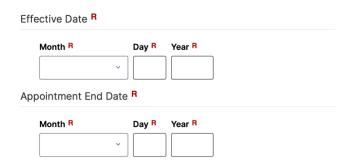
Dean: Refer to the Dean's memo, did they agree with the proposed action?

Dept: Refer to the Transmittal Letter. Did they agree with the proposed action?



Above shows a screenshot that needs to capture the action that was approved.

Action: Select the type of review that was conducted.
Series/Rank/Step: Select the appropriate items that reflect the approved action.
**If the review was an acceleration: please check if it was an acceleration in time, step, or both.



Please add the date that the approved action is effective.

** Assistant Professors and Assistant Teaching Professors/LPSOE will have an appointment end date. Associate and Full Professors will not have an appointment end date. Please refer to the notification letter for specific dates.

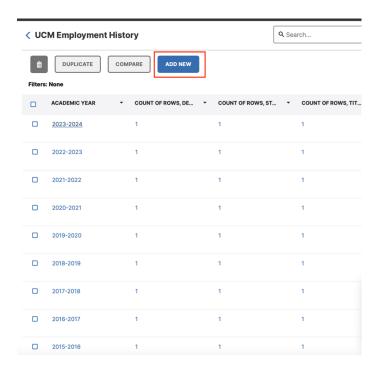
If this is an Associate or Full Professor. Scroll down until you reach the Mandatory 5 Year Review Date section. (see below). The date entered should be 5 years from the current effective date.

<u>Ten</u>	ured		
	Mandatory 5 Year	Review Date R	
	Month R	Day R Year R	
		•	

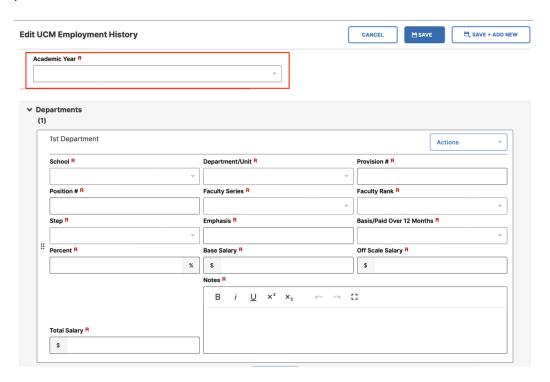
PRESS SAVE

You have now completed updating the current AY.

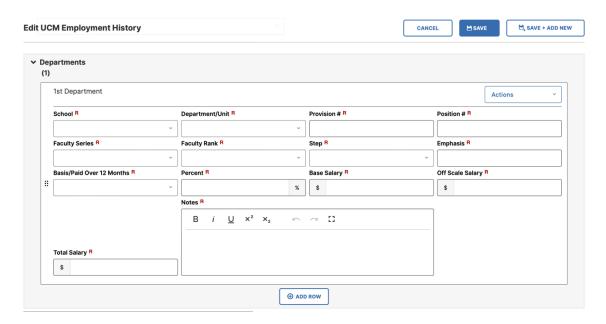
Next, you need to add the upcoming AY. To do so click on the Add New Button.



Once the new window opens type in the new AY year in the field. A list of possible years will populate, and you can click on the year you need. Then press save.



Once you press save you will return to the list of AY year links. Open the new AY you just created in a separate window. In another window open the current AY. For example, we are currently in AY 23-24 and importing data in AY 24-25. You will want these two years side by side so that you can easily copy and paste some of the information into the new AY.

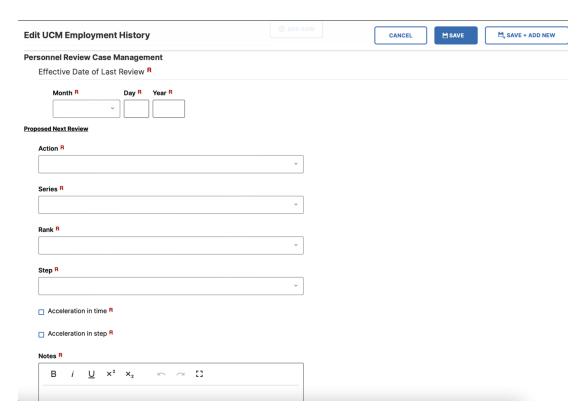


Fields to copy from the previous AY year: School, Department, Provision #, Position #, Emphasis, Base/Paid over 12 months, Percent.

Fields to add the approved action details: Faculty Series, Faculty Rank, Step, Base Salary, Off Scale Salary, Total Salary. This information can be found on the notification letter and dean's salary memo.

In the Notes field please type the action, outcome, and effective date. For example, "7/1/25 Merit to Associate Professor, Step III." This information will populate in the history card once the employment history section is saved.

Just below the Department information, you will find the following fields. Please complete each field. Please note that this information will be based on what the next normal advancement action would be. Optional: Acceleration in time/in step. This should only be checked if it applies to the review.



Lastly, add the effective date of the Next Review. This can be found in the MAPP:

For Senate Faculty:

https://academicpersonnel.ucmerced.edu/sites/academicpersonnel.ucmerced.edu/files/page/documents/mapp_2014_3.pdf

LPSOE and LSOE:

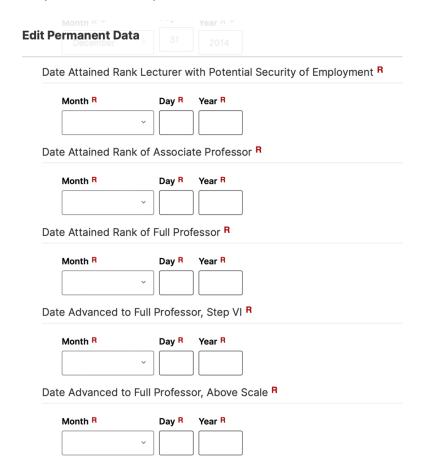
https://academicpersonnel.ucmerced.edu/sites/academicpersonnel.ucmerced.edu/files/page/documents/mapp_2054_3.pdf



Next you will need to return to the General Information page and click on Permanent Data.

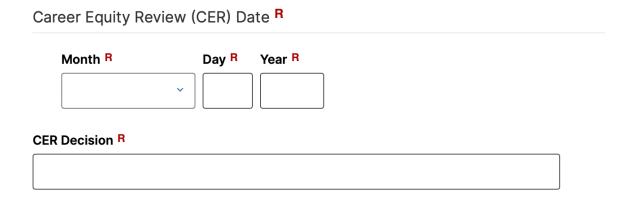


You will need to add the date that the new rank was attained. Reference the notification letter for the effective date and new rank. This screen is only completed when a Promotion has taken place (or if it was not previously added and you need to update to make the information accurate).



How to Process a CER in Faculty Success

In the current AY year, scroll down to nearly the bottom until you reach the following fields:



Refer to the notification letter to attain the required information to complete the fields above.

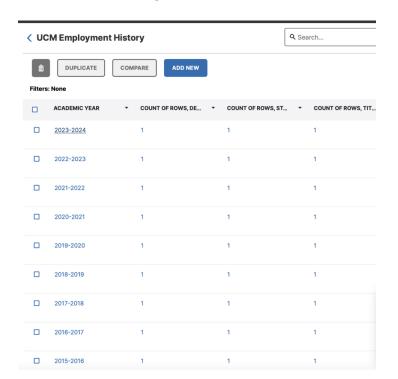
**If the CER results in an advancement, this will need to be updated as well. (same process as merit/promotion)

How to Process Eligibility Letters in Faculty Success

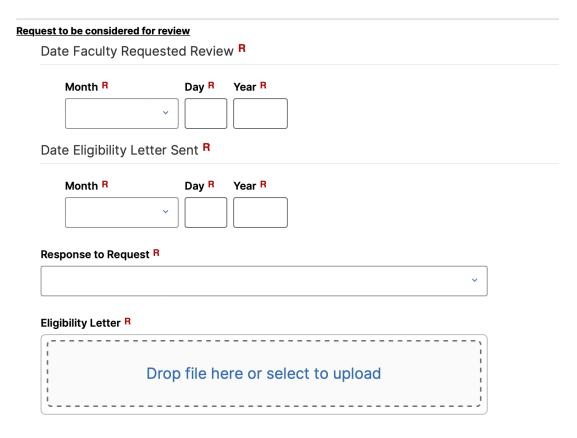
Type in the faculty member's name that you would like to update. Once you are in their file, under General Information, click on UCM Employment History.



Once you are on the UCM Employment History page. Please select the AY that the review is being conducted.



Scroll down until you see the following fields:

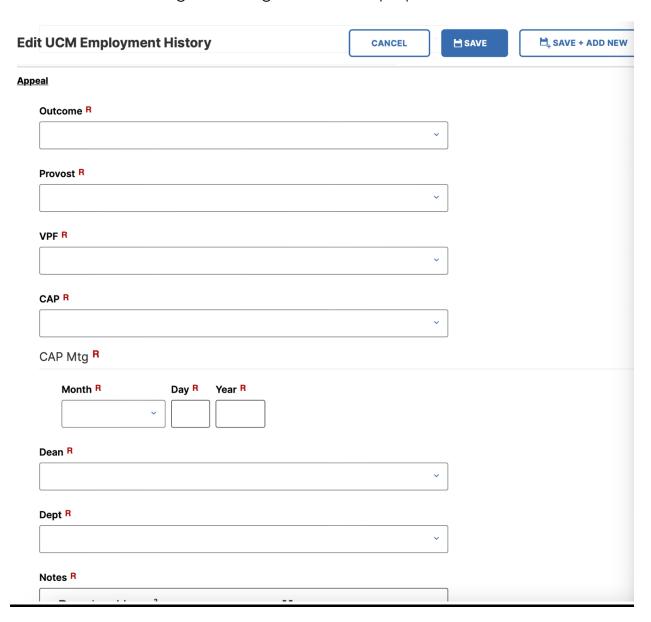


Complete each field based off the eligibility notice. Add the eligibility notice as a pdf in the last field.

How to Process Appeals in Faculty Success

Adding appeal related data is like processing review data. You will need to download all the appeal documents from ACRS prior to moving the case forward to APO. <u>Once the case moves to APO (Close Case)</u>, you will no longer have access to these documents.

Once you have the information, log into Faculty Success, and scroll down to the appeal section as seen below. Review the documents to determine the outcome, and who agreed/disagreed with the proposal.



Next you will complete the fields below. If the appeal was approved, the new series, rank, and step will need to be added. However, if there was no action, you will document that under action and leave series, rank, step, and the acceleration section blank. Lastly, add an effective date.

t UCM Employment History	CANCEL	⊟ SAVE	⊟ ₊ SAVE + ADD NEW
Action R		~	
Series R		_	
		~	
Rank R		~	
Step R		_	
		<u> </u>	
 □ Acceleration in time R □ Acceleration in step R 			
Effective Date R			
Month R Day R Year R			
Appointment End Date R			
Month R Day R Year R			

How to Process U18 in Faculty Success

Every year you need to remove anyone who was not reappointed or separated/resigned and add anyone that is new.

If someone has separated or is new you will need to add data to the Permanent Data screen.

→ General Information

Personal Information (Public)

Personal Information (Confidential)

Academic Personnel Office Permanent Data UCM Employment History | Leaves/Sabbaticals/ASMD

UCM Administrative Positions

External Professional Employment

External Professional Activities/Consulting

Licensures and Certifications

Professional Development

Professional Memberships

Education

Awards and Honors

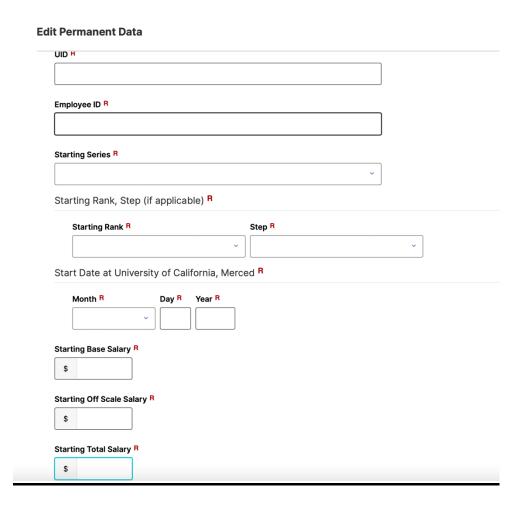
Diversity Activities

To add a separation date, scroll toward the bottom and add the separation date in the field shown below.

Separation Date R



If a new Lecturer needs to be added to Faculty Success, you will need to add data in all the fields shown below. Please notify APO so that the scheduled teaching can be imported.

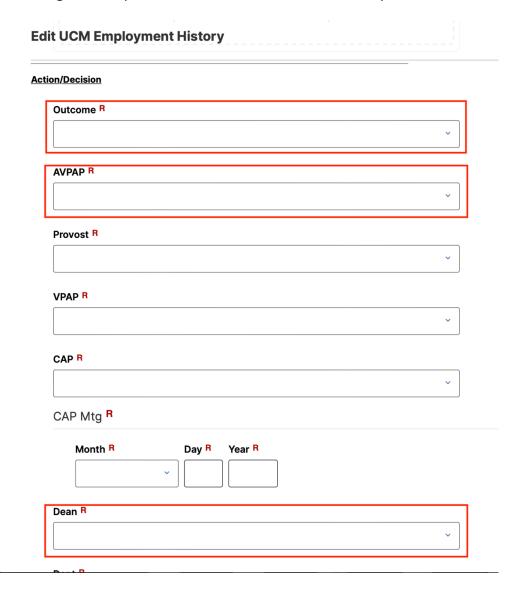


PRESS SAVE

To update data after a review, you will need to be on the UCM Employment History screen.

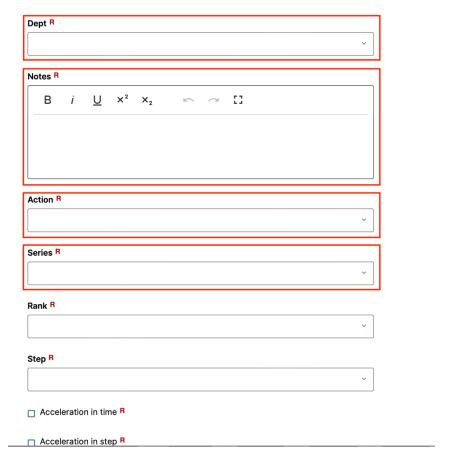


To enter the outcome of the review, scroll down to the Action/Decision section. You will need to reference the case documents from ACRS to complete the following fields. (Reference the screenshot below)



All cells that are outlined in red will need to be completed. We are documenting if each committee agreed or disagreed with the proposed action.

Outcome: What was the final decision according to the notification letter? AVPAP: Refer to the notification letter, did they agree with the proposed action? Dean: Refer to the Dean's memo, did they agree with the proposed action? Dept: Refer to the Transmittal Letter. Did they agree with the proposed action?



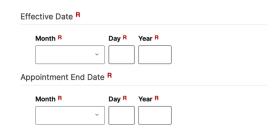
Above shows a screenshot that needs to capture the action that was approved.

Action: Select the type of review that was conducted.

Series/Rank/Step: Select the appropriate items that reflect the approved action

as needed per job title.

Notes: As needed

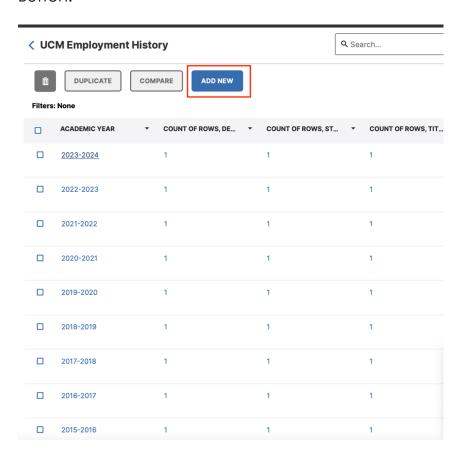


Please add the date that the approved action is effective.

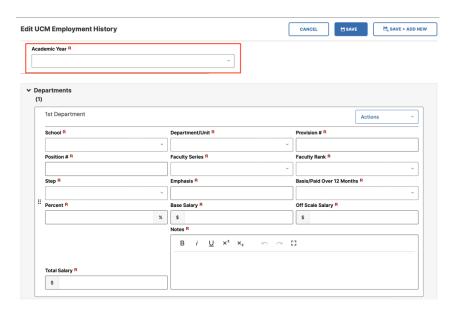
PRESS SAVE

You have now completed updating the current AY.

Next, you need to add the upcoming AY. To do so click on the Add New Button.



Once the new window opens type in the new AY year in the field. A list of possible years will populate, and you can click on the year you need. Then press save.



Once you press save you will return to the list of AY year links. Open the new AY you just created in a separate window. In another window open the current AY. For example, we are currently in AY 23-24 and importing data in AY 24-25. You will want these two years side by side so that you can easily copy and paste some of the information into the new AY.

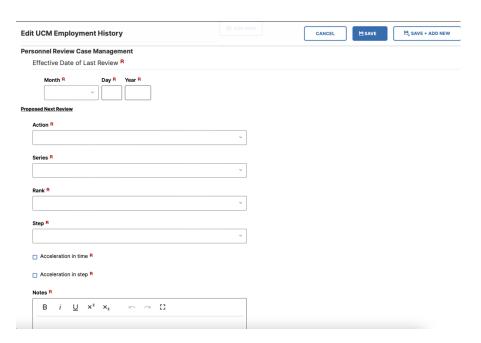
)eı	partments							
(1)								
	1st Department				Act	ions v		
	School R		Department/Unit R		Provision # R		Position # R	
		~		~				
	Faculty Series R		Faculty Rank R		Step R		Emphasis R	
		~		~		~		
	Basis/Paid Over 12 Months R		Percent R		Base Salary R		Off Scale Salary R	
H		~		%	\$		\$	
			Notes R					
			B i U x² x₂	7				
	Total Salary R							
	\$							

Fields to copy from the previous AY year: School, Department, Provision #, Position #, Emphasis, Base/Paid over 12 months, Percent.

Fields to add the approved action details: Faculty Series, Faculty Rank, Step, Base Salary, Off Scale Salary, Total Salary. Not all U18 reviews will result in a salary or step change. Update items that reflect the review.

In the Notes field please type the action, outcome, and effective date. For example, "7/1/25 Pre-Six Academic Review-Teaching Effectiveness." This information will populate in the history card once the employment history section is saved.

Just below the Department information, you will find the following fields. Please complete each field. Please note that this information will be based on what the next normal advancement action would be.



Lastly, add the effective date of the Next Review if applicable.



PRESS SAVE

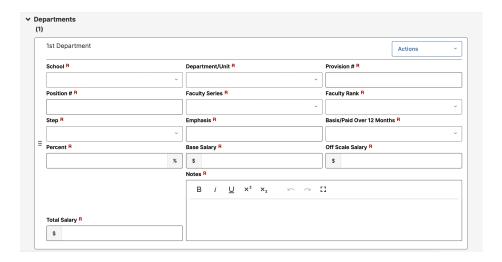
FAQs

In FS will the provision # always be the same? Are there any situations that it changes?

This is a manual entry text box, so this number should not be changed unless Esmeralda or Sharon indicate that a new provision number is needed for the employee.

Do the notes section from the Employment History tab appear in the history card?

Yes, but the notes that transfer onto the history card is the notes section at the very top in the Department section where the position information is. This is where we recommend that the schools/APO include notes on any appointment or salary changes (i.e., range adjustments/promotions/merits).



What populations are included in Faculty Success?

Professors, Teaching Professors, U-18

Are Pre-Six Lecturers in Faculty Success?

Yes. Every year you will have to manage this by removing anyone who was not reappointed or separated/resigned and adding anyone that is new. Please notify APO so that the scheduled teaching can be imported.

Who will add the upcoming year to individuals that are not currently under review?

APO does a work request for roll overs. Roll overs do not impact with anyone who has been manually rolled over.