

# Status-only Annual Review and Re-appointment

## Review Process for Eligibility of Review and Re-appointment

These instructions show how to run a search in the Permanent Record area of the Appointments Repository for all Status-only dossiers, listing the relevant fields departments need to review for accuracy and eligibility.

**This should be undertaken prior to initiating the Status-only Annual Review and Re-appointment (SO-ARRA) process.**

This activity gives the Department the opportunity to ensure that **all** Status-only appointments are included in the annual review and those due for re-appointment are captured in Laserfiche prior to creating next year's set of re-appointment dossiers. The list should be thoroughly vetted by the Department Chair, or delegate (i.e. applicable Education Leader), to ensure that all faculty listed should be invited to submit an activity report.

### A. Move completed new appointments into the Permanent Record Area

A Status-only dossier must be in the Permanent Record Area to have a pink-barred SO-ARRA folder generated. It is the pink-barred folder that facilitates the SO-ARRA process for a Status-only faculty member.

Therefore, it is important that you review your Other Academic subfolder in your \*New Appointments area to ensure that any new Status-only applications that have received final approval has a signed-back offer letter uploaded to the dossier and a Personnel Number entered into the Candidate Information – Other Academic template. Please refer to the *Guide to Academic Appointments: Using Web Forms and LaserFiche* ([http://dc.med.utoronto.ca/sites/default/files/InstructionManual\\_Appointments\\_DepartmentCoordinatorsClinical\\_Jan2016\\_1.pdf](http://dc.med.utoronto.ca/sites/default/files/InstructionManual_Appointments_DepartmentCoordinatorsClinical_Jan2016_1.pdf), paragraphs r to v on pages 16 and 17).

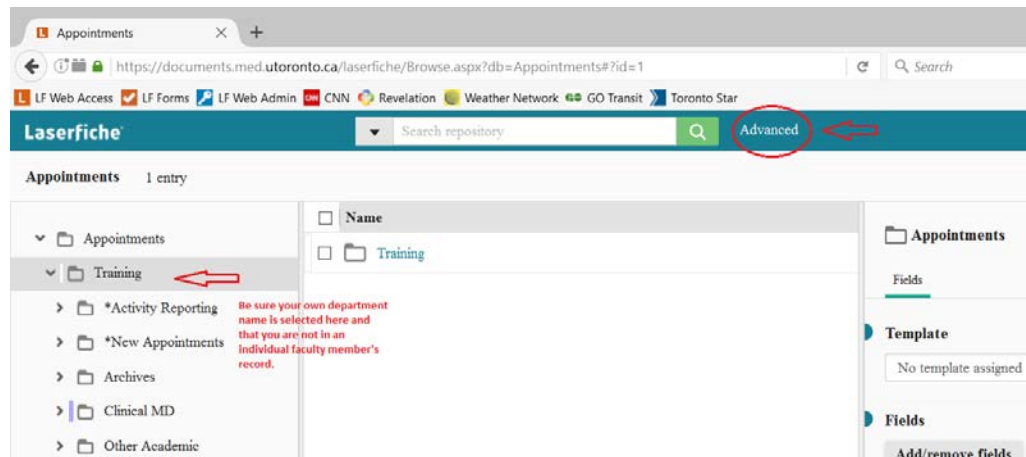
### B. Search the Permanent Record Area (see illustration below)

- a. Log in to the Appointments repository in Laserfiche Web Access using your Department username and password:

<https://documents.med.utoronto.ca/laserfiche>

Be sure that your own department name is selected and that you are not in an individual faculty member's record.

- b. Beside the Search bar at the top click on **Advanced**



- c. In the Advanced Search Box (see below)

- i. Beside Search Types, select Search Syntax.
- ii. In the Search Syntax box that appears at the bottom of the box, paste in the search query shown here.

**{LF:LOOKIN="Appointments\YOURDEPARTMENTNAME\Other Academic",  
SUBFOLDERS=0} & ({[Academic Appointment Category]="Status Only")}**

Note: It is very important that, in the query above, you change the text \YOURDEPARTMENTNAME\ to your actual department name as it exists in Laserfiche. (e.g. \Ophthalmology and Vision Sciences\)

There may be other boxes visible above the Search Syntax box. Do not type anything in them. You may remove them if you wish by clicking the small x on the right hand side.

- iii. Click Search

**Advanced Search** ✕

Search Types Add search type ▾ ☰ ▾ Saved Searches ▾

Search within entire repository ▾

**Date** ✕

Last modified ▾

(Select) ▾

**Search syntax** [Learn more](#) ✕

{(F:LOOKIN="Appointments\Paediatrics\Other Academic", SUBFOLDERS=0) & ({[]:[Academic Appointment Category]="Status Only")}

Save ^ Show search syntax Search Reset

- C. Configure the columns in the Search Results pane.
- a. Right-click on the column headings bar and select Column Picker.

Search Results

Search repository: Laserfiche

Search syntax: {(F:LOOKIN="Appointments\Paediatrics\Other Academic", SUBFOLDERS=0) & ({[]:[Academic Appointment Category]="Status Only")}

Name	Academic Appointment Cat...	End Date	Candidate Email Address
Arugula_Aristotle_9992013...	Status Only	6/30/2018	katherine.mcconne
Beans_Bonita_99920130394	Status Only	6/30/2017	katherine.mcconne
Collards_Collin_999201303...	Status Only	6/30/2016	katherine.mcconne
Graham_Jim_99920140010	Status Only	6/30/2017	katherine.mcconne
Pugsley_Darcy_99920140008	Status Only	6/30/2018	katherine.mcconne

- b. In the Configure Column Display box that appears
  - i. Under the Available side, scroll down to the fields under the Candidate Information - Other Academic template.
  - ii. One-by-one double-click on the fields Academic Appointment Category, Academic Appointment Level, Rank, End Date, Candidate Email Address, Applicant Mailing Address, and Personnel Number to the Selected side. The Name field refers to the name of the dossier folder so you should not need to move it.

iii. Click Apply

**Configure Column Display**

Available ★ Selected ★ Reset

Search

**Candidate Information - Othe...** ★

Start Date

Applicant ID

Department

Department Division

Appointment Policy

Last Name

First Name

Candidate Email Address Alter...

Citizenship

Other Citizenship

Area of Expertise

GraduateDegrees

Name

Academic Appointment Category

Academic Appointment Level

Rank

End Date

Candidate Email Address

Applicant Mailing Address

Personnel Number

**Double-click on fields to move them from the Available side to the Selected side or vice versa.**

**The fields in the Selected side will appear as column headings in the order they appear here. Click and drag up/down the fields to re-order them.**

Save Profile ★ Apply Cancel

iv. When you see the results page come up, sort the results list as you prefer by double-clicking on column headings.

D. Download the Report to Excel

a. When you have the columns sorted the way you like, click on the Generate Report button to download the results to Excel.

**Laserfiche** Search repository Advanced Display Options DC999

< Folders Search Results 5 entries

**Search Summary**

Search syntax [Learn more](#)

{(L:LOOKIN='Appointments\Training\Other Academic', SUBFOLDERS=0) & ((([Academic Appointment Category]='Status Only'))}

Name	Academic Appointment Cat...	Academic Appointme...	Rank
Arugula_Aristotle_9992013...	Status Only	Concurrent	Lecturi
Beans_Bonita_99920130304	Status Only	Primary	Assista
Collards_Collin_999201303...	Status Only	Primary	Profes:
Graham_Jim_99920140010	Status Only	Primary	Lecturi
Pugsley_Darcy_99920140008	Status Only	Concurrent	Assista

**Column Headings**

**Generate Report**

b. In the Select Report Type box that appears, select Metadata Report.

### Select Report Type ✕

Select a report to generate.

★ **Metadata Report**  
 View information about selected entries and their child entries. You can choose which information to include in the report.

**User Security Properties Report**  
 View a user's security properties, such as group membership, feature rights, and privileges.

Cancel

c. In the Generate Report box that appears, make sure Report Type is Excel. Click OK

### Metadata Report ✕

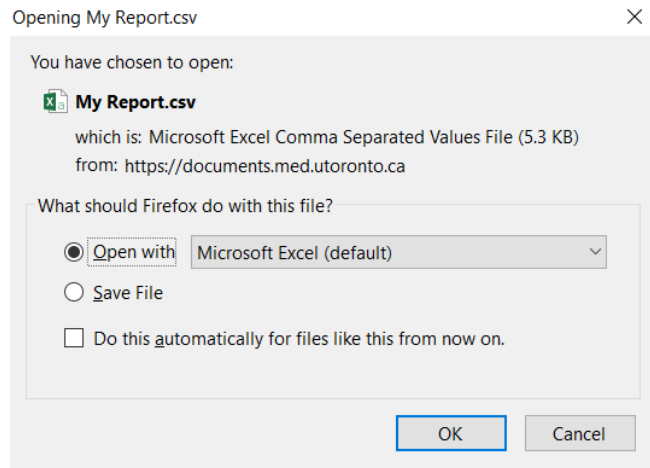
Report Type Excel ⌵ ← Report Type should be "Excel"

Include subfolders

Available	Selected
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input type="text" value="Search"/> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Common Columns</b></p> <p>Checked out by</p> <p>Classification level</p> <p>Created by</p> <p>Creation date</p> <p>Electronic file last modified</p> <p>Entry ID</p> <p>Extension</p> <p>Has tags</p> <p>Hit count</p> <p>Indexed</p> <p>Last modified</p> <p>Last modified by</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Name</p> <p>Academic Appointment Category</p> <p>Academic Appointment Level</p> <p>Rank</p> <p>End Date</p> <p>Candidate Email Address</p> <p>Applicant Mailing Address</p> <p>Personnel Number</p> </div>

★ OK Cancel

- d. Generating the report may take several minutes. When it is finished, click Open with Microsoft Excel and OK.



- e. This Excel file will generate outside of Laserfiche, opening in Excel.

#### E. Review the End Dates

- a. Dossiers without End Dates:

Any Status-only appointment dossier without an End Date should be edited immediately to include an accurate one.

If you still have the Search Results box open, put a check mark beside the person's dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Fill in the End Date field and click save.

If you have closed the Search Results box, double-click on the Other Academic folder in the left hand panel. Put a check mark beside the person's dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Fill in the End Date and click save.

**Note:** In order to change the field values in the Candidate Information - Other Academic template, only one person's dossier can be selected at a time (check mark in the box) at a time. Please double-check that you do not have multiple boxes checked.

Submitted documents from an initial appointment application or activity reports for renewal exist within the faculty's Laserfiche dossier and can be reviewed to confirm end date or inform the basis for previous renewals.

- b. Archive any non-active dossiers:

If a dossier has an End Date prior to the upcoming academic year-end and/or the

appointment will not be renewed, it should be removed from the Permanent Record area and put into the Archives folder. Please follow these steps carefully.

- i. If the Search results tab is still open, single click on the Folders tab on the left.
- ii. When you see your regular folder display, single click on the arrow beside your Department folder to expand it.
- iii. Single click on the arrow beside the Archives folder to expand it.
- iv. If there is not a sub folder in Archives for the applicable archive year, right-click on Archives and, in the drop down, select New/New Folder to create a folder called “[year]” (e.g. 2017).
- v. Single click on the arrow beside the Other Academic folder to expand it.
- vi. Drag the permanent dossier from under Other Academic up to the appropriate archive sub folder. This removes the permanent dossier from the Permanent Record area while preserving it in Archives.

c. Remaining End Dates:

All remaining dossiers should have an end date to reflect the upcoming academic year end (i.e. 6/30/20XX). **Each dossier with this End Date will be included in the re-appointment cycle for the coming academic year.**

F. Verify Academic Appointment Level

New in 2018: A third option is now available “Primary in FacMed”

“Primary in FacMed” should be used for faculty whose primary appointment lies outside of the Faculty of Medicine OR is a clinical faculty appointment. Selecting “Primary in FacMed” as the Academic Appointment Level allows the Laserfiche process to treat the dossier like a “Primary” dossier. For example, this will allow the department holding the “Primary in FacMed” to send an invitation to complete an activity report to the faculty member.

If you still have the Search Results box open, put a check mark beside the person’s dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Edit the Academic Appointment Level field as needed and click save.

If you have closed the Search Results box, double-click on the Other Academic folder in the left hand panel. Put a check mark beside the person’s dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Edit the Academic Appointment Level field as needed and click save.

**Note:** In order to change the field values in the Candidate Information - Other Academic template, only one person’s dossier can be selected at a time (check mark in the box) at a time. Please double-check that you do not have multiple boxes checked.

## G. Verify Emails

An active email is required for the renewal process. If you need to change a faculty member's email address

- i. If you still have the Search Results box open, put a check mark beside the person's dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Edit the Candidate Email Address field and click save.
- ii. If you have closed the Search Results box, double-click on the Other Academic folder in the left hand panel. Put a check mark beside the person's dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Edit the Candidate Email Address field and click save.

**Note:** In order to change the field values in the Candidate Information - Other Academic template, only one person's dossier can be selected at a time (check mark in the box) at a time. Please double-check that you do not have multiple boxes checked.

## H. Verify Rank

Faculty due for re-appointment, confirm recent promotions are updated. Rank will be included in the Letter of Offer generated using the Laserfiche template.

- i. If you still have the Search Results box open, put a check mark beside the person's dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Edit the Rank field and click save.
- ii. If you have closed the Search Results box, double-click on the Other Academic folder in the left hand panel. Put a check mark beside the person's dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Edit the Rank field and click save.

**Note:** In order to change the field values in the Candidate Information - Other Academic template, only one person's dossier can be selected at a time (check mark in the box) at a time. Please double-check that you do not have multiple boxes checked.

## I. Applicant Mailing Address Format

Faculty due for re-appointment, in Laserfiche's Candidate Information – Other Academic template, review Applicant Mailing Address field to ensure correct line breaks are inserted (what appears in this field is what exactly will appear in the Letter of Offer's inside address, directly under the faculty's name).



- i. If you still have the Search Results box open, put a check mark beside the person's dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Edit the Applicant Mailing Address field, inserting line breaks where appropriate, and click save.
- ii. If you have closed the Search Results box, double-click on the Other Academic folder in the left hand panel. Put a check mark beside the person's dossier in the centre panel and the Candidate Information - Other Academic template will appear on the right. Edit the Applicant Mailing Address field, inserting line breaks where appropriate, and click save.

**Note:** In order to change the field values in the Candidate Information - Other Academic template, only one person's dossier can be selected at a time (check mark in the box) at a time. Please double-check that you do not have multiple boxes checked.

J. Save Excel File

It is recommended that the exported excel file is used as a working file to verify faculty eligible for review and re-appointment. All subsequent changes should also be made in Laserfiche as per the instructions above regarding End Date. Upon completion of the verification process, a saved excel file should indicate what confirmations were made regarding each dossier and **Laserfiche should be updated appropriately.**