



UNIVERSITY OF TORONTO
FACULTY OF MEDICINE

Guide to Status Only Annual Reviews and Re-appointments

Using Web Forms and LaserFiche

Discovery Commons

April 2016

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Laserfiche Instructions

Status-Only Review and Re-Appointment

NOTE: to activate and track the progress of the annual reviews and re-appointments you will be working in the ***Activity Reporting** area of the directory tree. However, any documents generated by submission of the web Activity Report form will be stored in the faculty member's permanent dossier in the Permanent Record area of the directory tree. These are the yellow dossiers under the **Other Academic** folder.

The documents in the pink ***Activity Reporting** folders are shortcuts to the relevant documents in the Permanent Record area. You will see the activity reporting documents in the pink folders during the review process; however, please do not store anything in the pink folders, as the pink folders will be deleted every year.

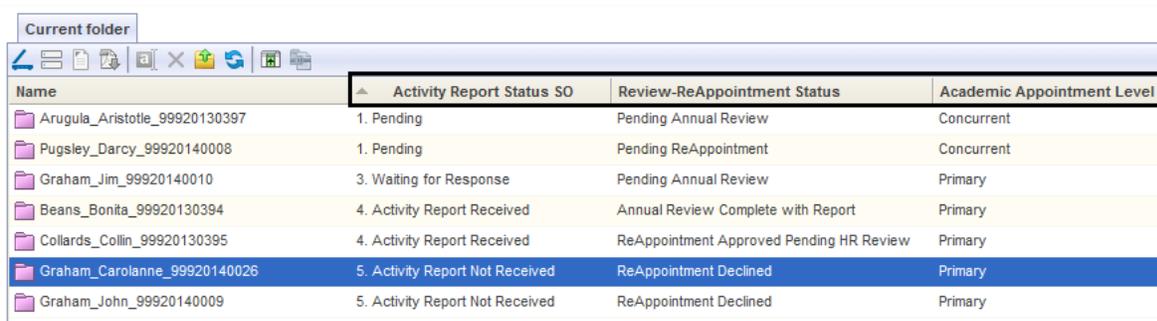
1. View Faculty Eligible for Annual Review and/or Re-Appointment

- i. In the directory tree (the left side bar), go to:
Department Name >> *Activity Reporting >> Other Academic.
- ii. Highlight the **Other Academic** folder and note the pink folders that appear on the right. These pink folders have been generated from the Permanent Record area and represent all of the status-only faculty eligible for annual review and/or re-appointment.
- iii. Ensure the column headers are displayed correctly. *See Appendix A: Loading & Configuring Columns.*

When the columns are displayed correctly, you will note that the following three field values show up automatically:

- **Activity Report Status SO** field value will default to "1. Pending".
- **Review-Re-Appointment Status** field value will default to either:
 - a. "Pending Annual Review" (if re-appointment is not required this year).
 - b. "Pending Re-Appointment" (if re-appointment is required this year as determined by the end date in the Candidate Information metadata template). *Pink folders with this status will contain a **Letter of Offer Template** that will be used if, after review, the DAC approves the re-appointment.*
- **Academic Appointment Level** field value will show as either Primary or Concurrent.

Example of Column Headings:



Name	Activity Report Status SO	Review-ReAppointment Status	Academic Appointment Level
Arugula_Aristotle_99920130397	1. Pending	Pending Annual Review	Concurrent
Pugsley_Darcy_99920140008	1. Pending	Pending ReAppointment	Concurrent
Graham_Jim_99920140010	3. Waiting for Response	Pending Annual Review	Primary
Beans_Bonita_99920130394	4. Activity Report Received	Annual Review Complete with Report	Primary
Collards_Collin_99920130395	4. Activity Report Received	ReAppointment Approved Pending HR Review	Primary
Graham_Carolanne_99920140026	5. Activity Report Not Received	ReAppointment Declined	Primary
Graham_John_99920140009	5. Activity Report Not Received	ReAppointment Declined	Primary

2. Send Activity Report Request to Faculty Primary to your Department

The Department is engaging their status-only faculty to participate in the completion of an academic activity report for the purpose of either their annual review or re-appointment. Each faculty will receive an email request identifying (based on end date in LaserFiche) whether they are being considered for review or re-appointment and instructing them on whether they are required to submit additional documentation for their primary department. *See Appendix D: Email Templates.*

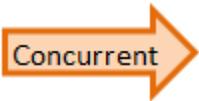
- i. Sort on the column **Academic Appointment Level**, by clicking on the column header. (Ensure that the correct columns are displayed. *See Appendix A: Loading & Configuring Columns.*)
- ii. Highlight individually, or in bulk, those pink folders which are Primary to your department. Right-click and select Metadata. This will open the Activity Reporting – Status Only template.

If the screen size does not allow you to select Metadata from the drop-down list, move your mouse pointer over to the LaserFiche menu bar, select File >> Metadata.

- iii. Change the entry in the **Activity Report Status SO** field to “2. Send Request for Activity Report” and click Save.
- iv. Refresh your screen and take note that the **Activity Report Status SO** field has changed to “3. Waiting for Response”.
- v. Wait for the faculty to respond.

Reminder: If you are doing this for many folders at a time, note that it may take LaserFiche several minutes to compute them all.

Notifications: This action will send one of two possible emails to the faculty members holding a primary status-only appointment in your department. The email advises them that an Activity Report is due either for the purpose of Annual Review or Re-appointment. *See Appendix D: Email Templates.* This email gives all the information required to fill in the online activity report, attach a document (if applicable), and/or decline re-appointment (if applicable). As the department coordinator, you will receive a copy of this email.



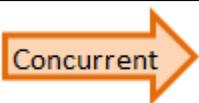
Faculty holding a concurrent status-only appointment to your department will receive the email request only from the department in which they hold their primary status-only appointment and the concurrent department will receive a copy of this email.

The **Activity Report Status SO** field for the pink folder in the department in which a faculty member holds a concurrent appointment will also change to “3. Waiting for Response” once the primary department sends the request.

The successful submission of the Activity Report by the faculty member will result in the following:

- a. The **Activity Report Status SO** field value will change to “4. Activity Report Received”.
- b. Data collected from the web form will show in the columns beside each pink folder.
- c. A .pdf document of the activity report will be created and stored in the permanent dossier (yellow dossier) for this faculty member.
- d. Any required attachments to the form (if received) will also be stored in the permanent dossier.
- e. Shortcuts to the activity report .pdf and, if present, any extra document(s), will be created in the pink activity reporting folder. This will allow the Department Appointments Committee (DAC) to view the activity report through the Read-Only Portal.
- f. The faculty member will receive an email acknowledging the receipt of their activity report with a copy attached.

Reminder: never store anything in the pink folder as the folder and all its contents will be deleted every year.

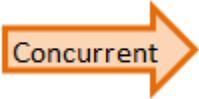


When a faculty member successfully submits their activity report web form, all the events described in (a–f), immediately above, will occur for the faculty member’s pink dossier and permanent dossier in the concurrent department.

The successful submission of the web form declining Re-Appointment will result in the following:

- a. The **Activity Report Status SO** field value will change to “5. Activity Report Not Received”.
- b. The **Review-ReAppointment Status** field value will change to “ReAppointment Declined”.
- c. A .pdf document will be created acknowledging the faculty member’s decision to decline re-appointment and will be stored in the permanent dossier (yellow dossier) for this faculty member.
- d. The permanent dossier and all of its contents will be moved automatically from the permanent record area into the **Archives** folder thereby rendering it inactive. It will no longer be eligible for future review or re-appointment processes in LaserFiche.

- e. The faculty member will receive an email acknowledging the receipt of their decision to decline re-appointment with a copy of the decision to decline attached.

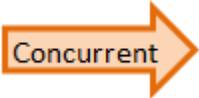
 Concurrent	When a faculty member successfully submits a webform declining re-appointment, all the events described in (a– e), immediately above, will occur for the faculty member’s pink dossier and the permanent dossier in the concurrent department.
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2a. Send an Activity Report Request Reminder and/or Correct an Email Address

If you do not see a change in the value of the **Activity Report Status SO** field for those faculty *Primary* to your department, and it continues to show “3. Waiting for Response”, you may re-send the email by changing the **Activity Report Status SO** field value back to “2. Send Request for Activity Report” and clicking Save. Again, the **Activity Report Status SO** field value will automatically change to “3. Waiting for Response”.

This could also be done if you would like to re-send the email to a faculty member who has lost the email, or needs it sent to a different email address.

Note: If an email address needs to be corrected, change it in the metadata for the permanent dossier (yellow dossier) and click Save BEFORE re-setting the Activity Report Status SO field value back to “2. Send Request for Activity Report” in the pink folder.
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 Concurrent	It is the responsibility of the primary department to send the activity report request. If you, as the concurrent department, notice that the faculty member has yet to submit their report and the submission deadline is approaching, please connect with the primary department to ask that they re-send the request.
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3. How to Review Activity Report Responses

Faculty are required to submit their activity reports by a deadline set by the Faculty of Medicine. Following the deadline, the department will ideally have received activity reports from each of their faculty; however, this is not guaranteed. The DAC and Department Chair are responsible for reviewing all submissions and assessing the status of those who did not submit to determine their eligibility to maintain a status-only academic appointment in the department.

3a. Review Status Fields

At this stage in the process, the following values for the **Activity Report Status SO** field may be present:

- a. “3. Waiting for Response” – The Department has sent email requests asking the faculty member to complete the activity report and submission is still pending.
- b. “4. Activity Report Received” – The faculty member has completed the activity report and the activity report is ready for review.
- c. “5. Activity Report Not Received” – This value is set automatically by LaserFiche if the faculty member submits a web form declining re-appointment. Alternately, the department coordinator may select this field value if they wish to record the non-submission of an activity report for any reason.

In addition, each pink folder will carry a value for the **Annual Review/ReAppointment Status** field of either:

- d. “Pending Annual Review” – the initial default value when the appointment end date is not within the current re-appointment period.
- e. “Pending Re-Appointment” – the initial default value when the appointment end date is between **June 30th of the current year to June 29th of the next year.**
- f. “Re-Appointment Declined” – if the faculty member filled out the web form to decline re-appointment.

These statuses differentiate between the faculty who require annual review, re-appointment, and those choosing to discontinue their appointment.

3b. Viewing Responses

The Department Coordinator, the Department Appointments Committee (DAC), and/or the Department Chair may view all the faculty responses in any of the following three ways:

❖ Read-only Portal

The DAC may review the activity reports and any documents attached to the web form by logging into the Read-Only Portal.

URL: <https://documents.med.utoronto.ca/appointments>

User Name: dacxxx (where xxx = the department’s organizational unit)

Password: “password” (unless changed by department)

To access folders:

- i. Login.
- ii. Click Browse.
- iii. Select: your Department.
- iv. Select: *Activity Reporting.
- v. Select: Other Academic – to view the individual pink dossiers.

**See Appendix B: Configuring Columns in the Read-Only Portal*

Note: If your DAC would like to use this method to view the individual activity report .pdf documents we encourage you to review and revise the column configuration to best suit the needs of the DAC. If they do not appear to have the same view as the department coordinator, please provide DAC members with in the instructions in Appendix B.

❖ Excel Spreadsheet

You may export the data collected by the activity report web form to an excel spreadsheet. The spreadsheet can be formatted outside of LaserFiche to present the data in a user-friendly manner. If applicable, incorporate a method to record a decision on eligibility for a continued appointment (e.g. by adding an extra column to the spreadsheet).

Note: LaserFiche will export to Excel an exact replica of what is seen in the columns displayed beside the pink folders. Please ensure that your columns are displayed appropriately before exporting the data.

To Export Data to Excel:

- i. Double check that all the activity report columns are visible next to the faculty pink folders.

See Appendix A: Loading & Configuring Columns

- ii. Go to the LaserFiche menu and select Export >> List Contents.
- iii. When prompted, select Tab as the field delimited character. Click OK.
- iv. Open the file with Microsoft Excel or Save it.
- v. In Excel, you may change the column widths and or the column headers to make the document more legible.

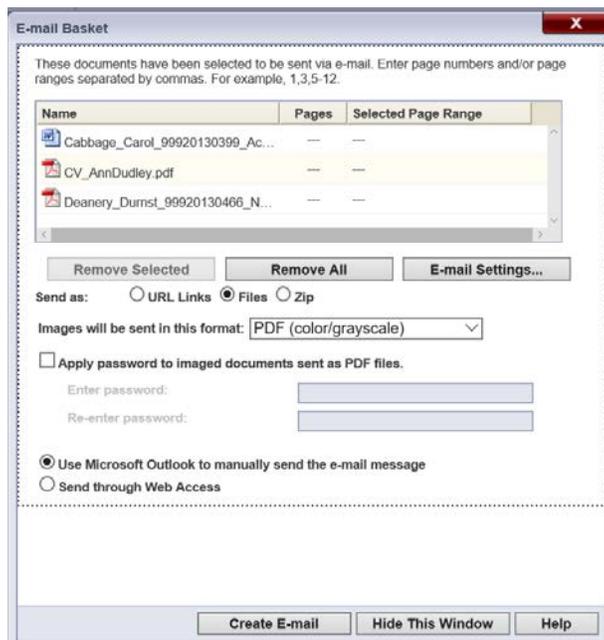
Send the document to DAC members who prefer to review the data in this manner.

❖ Email Documents Directly from Individual Faculty Dossiers

The .pdf document created by the submission of an online activity report form, and any document that was attached to that form, are stored in the faculty member's permanent dossier (yellow dossier). These documents may be attached to an outgoing email directly from the LaserFiche Repository and then sent to a DAC member or to a Chair.

- i. Locate the faculty member's permanent dossier in the Permanent Record area.
- ii. Double click on the **Activity Reports** subfolder to open it and display the documents inside in the right-hand window.
- iii. Highlight the documents you wish to attach to an outgoing email.

- iv. Right-click on the highlighted documents, and select Email Documents from the drop down menu that appears.
- v. In the Email Basket box that appears ensure that:
 - a. The **Send As Files** radio button is selected.
 - b. Images will be sent in the **.PDF format**.
 - c. The **Use Microsoft Outlook to manually send the email** is selected.



- vi. Click Create Email.
- vii. Microsoft Outlook (if this is the email application you use) will create an outgoing email with the selected documents attached. Add an appropriate email address and subject line and send the email.

4. DAC and Department Chair Review Outcomes

The Department Coordinator should collect all decisions made by the DAC and Department Chair on whether to continue the faculty's academic appointment with the department. All decisions must be recorded in LaserFiche by the Department Coordinator.

4a. Annual Review

The Department Coordinator will change the **Review-ReAppointment Status** field to either of the following values, depending on the circumstances:

- i. "Annual Review Complete with Report".
- ii. "Annual Review Complete without Report".

Successful Annual Review:

If it is determined that the faculty member continues to meet the eligibility criteria for the appointment, and if an activity report was received, then the **Review-ReAppointment Status** field should be changed to “Annual Review Complete with Report”. This completes the annual review process and no further action is required.

Alternative: If no activity report was received, but the Department Chair confirmed the faculty’s eligibility through other methods, the **Review-ReAppointment Status** field may be changed to “Annual Review Complete without Report”.

Unsuccessful Annual Review:

If it is determined that the faculty no longer meets the eligibility criteria for the appointment, then the **Department must contact the faculty in writing as soon as possible notifying them that their appointment will be ended.** In addition, the primary department is responsible for notifying any departments in which the faculty holds a concurrent appointment(s). *See HR Portal for a Letter of Discontinuation template.*

Important: The letter to the faculty member notifying them that their appointment will be ended must be uploaded to their LaserFiche dossier in the Permanent Record Area and their candidate’s metadata must be updated to include the new end date. The dossier should then be moved (dragged) to the **Archives** folder. Please ensure to record the end of the appointment in all University systems including HRIS and Department websites.

4b.Re-Appointment Review

Recommended for Re-Appointment:

If the Department Chair supports the re-appointment of the faculty to another term, the pink activity reporting folder must be sent (*in LaserFiche*) to Human Resources for review. *Please go to Section 5 (Preparing a Pink Reappointment Folder for Review by Human Resources).* Only after a pink folder has been prepared for HR review will the department coordinator change the **Review-ReAppointment Status** field to “Re-Appointment Approved Pending HR Review”.

Re-Appointment Declined:

If a faculty member declines the opportunity for re-appointment, that status is recorded and no further action is required by the Department in LaserFiche. The permanent LaserFiche dossier is automatically archived and will no longer be considered for future review/re-appointment processes.

Refused Re-Appointment:

If the Department Chair does not support the re-appointment of the faculty member, or they no longer meet the eligibility criteria for the appointment, the **Department must contact the faculty in writing as soon as possible and no later than June 30th of the current year.** *See HR Portal for a Letter of Discontinuation template.*

The Department Coordinator will change the **Review-ReAppointment Status** field to “Re-Appointment Refused by DAC”. This will automatically move the faculty member’s permanent dossier into the **Archives** area of LaserFiche. The notification letter to the faculty member must be uploaded to their permanent dossier when it is in either the permanent record area or after it has been moved to **Archives**.

Important: If the faculty member declines re-appointment or if the Chair refuses to re-appoint, please ensure to record the end of appointment in all University systems including HRIS and Department websites. In addition, the primary department is responsible for notifying any departments in which the faculty holds a concurrent appointment(s).

5. Preparing the Pink ReAppointment Folder for Review by Human Resources

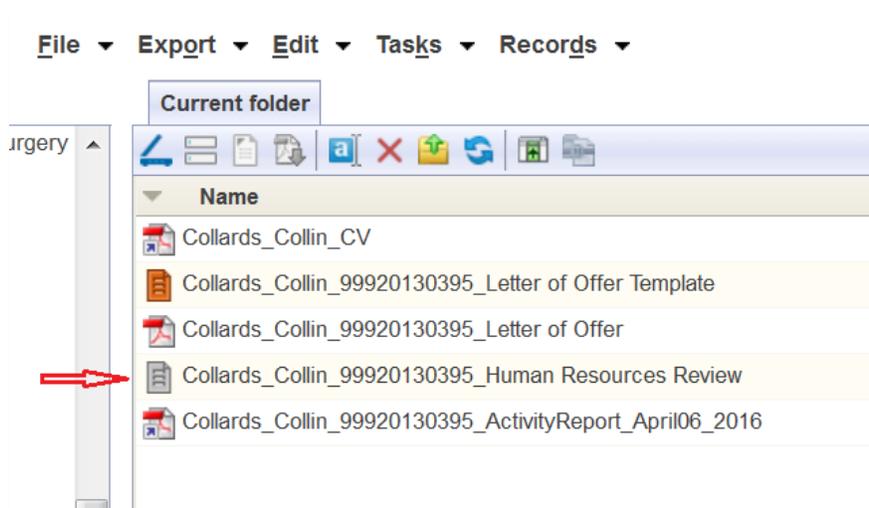
Note: This section applies only to those faculty members scheduled for re-appointment.

- i. After the Chair or DAC has approved a faculty member for re-appointment and BEFORE the **Review-ReAppointment Status** field is changed to reflect that approval, the following two actions must occur:
 - a. The pink folder must contain a Letter of Offer. This Letter of Offer should be created from the Letter of Offer template present in the pink folder for all faculty requiring re-appointment. This letter will automatically be given a file name of:
lastname_firstname_appointmentID_Letter of Offer. Please do not change this file name

Please see Appendix C: Creating Letters of Offer.
 - b. The **Primary Employer Confirmed** field value, in the metadata for the pink folder, must be changed to ‘Yes’. (This assumes the department coordinator has a statement from the primary employer confirming that this is, in fact, true).

Note: If *a* or *b*- above are not accomplished, changing the **Review-ReAppointment Status** field to “ReAppointment Approved Pending HR Review” will fail to process. An email will alert the Department Coordinator that this has failed and the **Review-ReAppointment Status** field value will be returned to “Pending ReAppointment”.

- ii. When *a* and *b* above are completed, change the **Review-ReAppointment Status** field to “ReAppointment Approved Pending HR Review”. This action makes the pink folder visible to Human Resources and adds a grey **Human Resources Review** template to the folder.



To open it, right-click on the grey template and select metadata from the drop-down list that appears.

You may write a department comment in here if necessary. Human Resources can now see the pink folder and will be able to read any comments whether they are added now or added later.

6. Human Resources Review

Human Resources will now review the contents of the pink folder. If they have any questions, they may use LaserFiche to correspond with you.

The Human Resources Review template allows HR to make one of two possible selections in the **HR Approval Status** field:

- I. "Incomplete: Return to Dept. Coord."
- II. "HR Approved"

6a. Incomplete: Return to Dept. Coord.

If HR has questions about the appointment, they will write a note in the **HR Comment** field and select 'Incomplete: Return to Dept Coord' in the **HR Approval Status** field. This results in two actions being taken by LaserFiche:

- a. An email is sent to the Department Coordinator alerting them to an issue requiring resolution relating to this appointment. This email contains the content of the **HR Comment** field but the Department Coordinator may read the comments directly in the template.
- b. In the metadata for the pink folder, the **Review-ReAppointment Status** field reverts to "Pending ReAppointment".

Please make the changes requested by HR and change the **Review-ReAppointment Status** field value back to 'ReAppointment Approved Pending HR Review'. This will alert HR that the folder is again ready for review.

6b.HR Approved

When Human Resources is satisfied with the appointment folder, they will select 'HR Approved' in the **HR Approval Status** field (in the grey template). This results in two actions being taken by LaserFiche:

- The value of the **Review-ReAppointment Status** field in the metadata of the pink folder will be changed to 'ReAppointment Approval Confirmed by HR'.
- A new field, named **Email Letter of Offer to Candidate** will be added to the very bottom of the grey Human Resources Review template. This will be used to email the letter of offer and any enclosures to the faculty member. It will only appear after HR has registered its approval of the appointment.

Department Status [Remove](#)
Approved

End Date [Remove](#)
31/12/2016

First Name [Remove](#)
Darcy

Last Name [Remove](#)
Pugsley

PhD Scientist [Remove](#)
No

Rank [Remove](#)
Assistant Professor

Review-ReAppointment Status PREVIOUS [Remove](#)
Pending ReAppointment

Email Letter of Offer to Candidate [Remove](#)
Pending

Pending
Email Letter of Offer
Sent Letter of Offer Outside of Laserfiche

7. Sending the Letter of Offer to the Faculty Member

To send an e-mail with an attached Letter of Offer and, if desired, additional attachments (enclosures) follow these steps below:

- I. Make sure that a Letter of Offer is in the pink folder and that it is named:
Lastname_Firstname_ApplicantID_Letter of Offer.

- II. Ensure that documents (enclosures) you wish to send along with the Letter of Offer meet these criteria:
 - Documents should be Identified in the **Letter of Offer Enclosures** field (in the gold letter of offer template).
 - Documents exist within the pink folder.
 - Document file names begin with the word Enclosure.
Examples: Enclosure_DepartmentProfile, EnclosureAcademicPositionDescription, etc.

Important: Any file beginning with the word “Enclosure” will be picked up and attached to the Letter of Offer email regardless of whether or not it is mentioned in the Enclosures field in the Letter of Offer template and therefore written on the .pdf Letter of Offer. The letter of offer itself does not need to have the word “Enclosure” at the beginning of the file name.

- III. Double-check that the e-mail address for the candidate is correct in the Candidate Email Address field in the Candidate Information template (right-click on yellow permanent dossier and select metadata).

- IV. Open the Human Resources Review template (grey icon) by right-clicking and selecting Metadata. Scrolling down to the bottom of the template shows the previously invisible field titled “Email Letter of Offer to Candidate. This field only becomes visible when the application receives final approval from HR.

Select Email Letter of Offer, and up at the top of the template, click Save. The following will occur:

- An email is sent to the faculty member. The letter of offer, and any files beginning with the word Enclosure, will be attached.
- The same email is automatically copied to the Department Coordinator.
- The same email is automatically copied to any email addresses in the **Letter of Offer CC Email Addresses** field.

8. Importing the Signed Letter of Offer into the Permanent Dossier

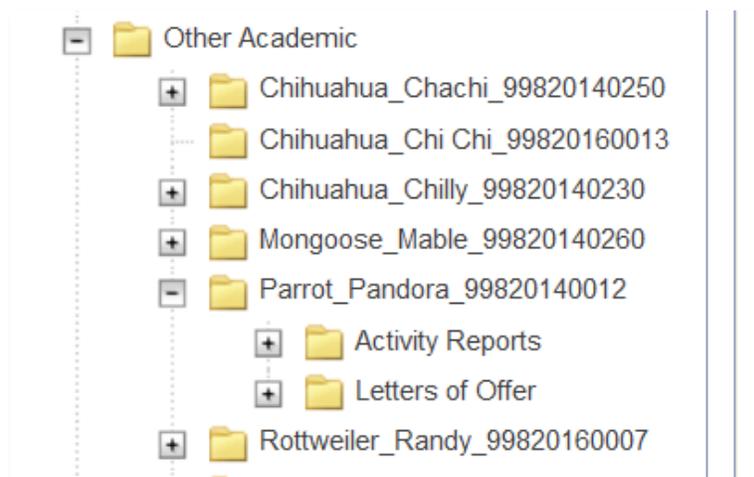
The faculty member is required to print, sign and return the letter of offer to the Department Coordinator. When the department coordinator receives a signed letter of offer, they must import it into the (yellow) Permanent dossier for that faculty member (not into the pink folder).

Important: The pink folder and all of its contents are deleted every year. Any document generated by LaserFiche and in the pink dossier is automatically copied and saved to the permanent (yellow) dossier; however, any imported documents will only be saved if placed directly into the permanent (yellow) dossier.

To import a Signed Letter of Offer into the Permanent (yellow) dossier:

- I. In the left sidebar, expand the faculty member's permanent dossier by clicking the plus sign beside it.

Highlight the Letters of Offer subfolder. If the Letters of Offer subfolder is not there, please contact the Discovery Commons at discovery.common@utoronto.ca and ask to have it created.



- II. At the top of the LaserFiche window, click on **File >> Import** and Browse to select the file that will be imported. Disregard the prompt for the folder path and select **Start Import** at the bottom of the window.

Appendix A: Loading & Configuring Columns

The column headings have been pre-set. If you lose the correct configuration of columns there are two ways to re-establish them.

Load the Saved Column Configuration

- a. In the directory tree (the left side bar), go to:
Department Name >> *Activity Reporting >> Other Academic
(you will see pink folders in the right-hand frame).
- b. Right-click on the bar containing the column headings and select Load/Save Columns.
- c. Select “Activity Reporting Status Only”.

Configure your own Column Configuration and Save it.

- d. In the directory tree (the left side bar), go to:
Department Name >> *Activity Reporting >> Other Academic
(you will see pink folders in the right-hand frame).
- e. In the top right-hand-side of the screen, click on Settings.
- f. Under Browser, select Browser Columns.
- g. Click the radio button “Remembered for each folder”.
- h. In the drop down under Available columns, select Template.
- i. In the box below, scroll down to the template called “**Activity Report – Status Only**”.
- j. One-by-one, select every field name and click the right arrow button to move the selected item to the box on the right. These are the columns that will be displayed.
- k. Using the up and down arrows at the bottom of the box on the right, move the fields into the order shown in the list below.
- l. Click Save.
- m. Back in the main activity reporting (pink folders list) frame, right-click on the bar containing the column headings and select Load/Save Columns.
- n. Click Save.
- o. Either save the column profile with a new name or replace the existing column profile.
- p. Click Save.

Correct Order of Column Headings

- Activity Report Status SO
- Review-ReAppointment Status
- Academic Appointment Level
- Primary Employer Confirmed
- End Date
- Leaves
- Employment Arrangements
- Primary Clinical Site
- Primary Academic Site
- Primary Academic Site Other
- Teaching
- Teaching Primary Audience
- Teaching Activity Type
- Research Supervision
- Research Supervision Primary Audience
- Research Supervision Role
- Concurrent Departments
- Concurrent Department 1
- Concurrent Department 1 Teaching
- Concurrent Department 1 PA
- Concurrent Department 1 Teaching Type
- Concurrent Department 1 Research Supervision
- Concurrent Department 1 Research Supervision Role
- Concurrent Department 2
- Concurrent Department 2 Teaching
- Concurrent Department 2 PA
- Concurrent Department 2 Teaching Type
- Concurrent Department 2 Research Supervision
- Concurrent Department 2 Research Supervision Role
- Research
- ResearchDesc
- Research Funding
- Research Projects Funded
- Research Role
- Publications
- Publications Number
- Publications Type
- Publications Role
- Intellectual Property

- Intellectual Property Desc
- Presentations
- Presentations Role
- Presentations Scope
- Administrative Functions
- Administrative Desc
- Awards
- Awards Desc
- CPA
- CPA Desc

Appendix B: Configuring Columns Read-Only Portal

Configure columns for your DAC

- a. Go to: <https://documents.med.utoronto.ca/appointments/>
- b. Click Browse Dossiers.
- c. Click Your Department Name.
- d. Click *Activity Reporting.
- e. Click Other Academic.
- f. It will be very helpful to change the column display. To change the columns displayed, Click My Weblink in the top right-hand corner.
- g. Click Browse Options.
- h. In the dropdown menu under Browse Options, click Fields.
- i. Select the following fields using the arrow to move them into the right side box.
- j. Remove any fields that are not listed below by using the arrow to move them to the left side box.
- k. When completed, click Home.

Correct Order of Column Headings

- Activity Report Status SO.
- Review-ReAppointment Status.
- Academic Appointment Level.

Appendix C: Creating Letters of Offer

When a pink activity-reporting folder is created for a faculty member requiring re-appointment, a gold-coloured Letter of Offer template is automatically inserted into the folder. Use this template to create one of two possible letters of offer:

- A letter for those Status Only faculty who also hold a clinical appointment.
- A letter for those who do not hold a clinical appointment regardless of whether their appointment in your department is Primacy or Concurrent.

To create a letter of offer:

- I. Right-click on the Letter of Offer template and select Metadata from the dropdown list.
- II. Fill in the fields in the Letter of Offer template:

Start and End Dates: To ensure that appointment dossiers never get saved in LaserFiche without an End Date, an End Date has been automatically calculated from the current system date. This may be changed but all dates must adhere to accepted policy. If you are unsure of the date, select an estimated Start Date. This will likely need to be changed before the final version of the letter of offer is generated. The same Start and End Date fields can be seen on the Candidate Information template. If you create a letter of offer with the Letter of Offer template, those date values will overwrite the date values in the Candidate Information template. The reverse process is not true.

Has Clinical Academic Appointment: If the faculty member under consideration for Status Only Re-appointment also holds a clinical appointment in another department, they fall under the guidelines laid out in the *Policy for Clinical Faculty*. This is outlined in the pre-approved text of the generated letter of offer. You must select 'yes' or 'no' to this field.

Department Clinical: If the answer to the field above was 'yes', please indicate the clinical department in which the faculty member holds their clinical appointment. This will appear within the pre-approved text of the generated letter of offer for Status Only appointments.

Primary Employer: This is the name of the site where the faculty member is supported to perform the majority of their academic duties. It is collected from the submitted activity report form and added here for your convenience. It is presumed that the faculty member's employment here has been confirmed by the department. The text may be overwritten, if necessary, but please do not enter addresses or other information – just the name of the site.

Areas of Responsibility: This text box allows a department to add a brief description of the activities expected from the faculty member during their appointment with the department. Normally, this covers activities in any combination of Teaching, Research and/or Service.

Note: The text box has a maximum character count of 600 characters. The text will appear on page 2 of the letters of offer. You may want to experiment with formatting to determine the best use of the space.

Offer Retraction Date: This is the date before which you wish to receive back a signed letter of offer. If necessary, update this field for the final version of the letter.

Letter of Offer CC: This is a text field. Up to 4 names may be added to this field. Please put each on a separate line. This text will appear in the CC area of the actual letter.

Letter of Offer CC Email Addresses: If there are names in the Letter of Offer CC field above, it is necessary to add the associated email addresses in this field. This is a multi-value, email address field, meaning that when one email address is typed in the field box, a second box will appear immediately below the first to house the next address – do not type the email addresses all into one box as was done in the Letter of Offer CC text box above. These email

addresses do not appear in the letter, they are used when the Letter of Offer email is eventually sent, to capture and input the required email addresses

Letter of Offer Enclosures: If LaserFiche will be used to send the re-appointment Letter of Offer to the faculty member, you may wish to attach additional documents to that email. If that is the case, you need to reference those additional documents in the text at the bottom of the letter of offer.

To make reference to any planned attachments to the letter of offer, type into this field the word 'Enclosed:' followed by the names of the documents.

For example:

Enclosed:

Welcome Package

Profile Form

Important: Typing text into the Letter of Offer Enclosures field simply adds the text to the letter. It does not control whether those documents actually exist in the pink folder and are available for attachment to the email.

Any documents mentioned in this field need to be uploaded to the pink folder before the final version of the letter is sent AND the file names of these additional documents need to begin with the word Enclosure.

examples: Enclosure_DepartmentProfile.docs

EnclosureWelcomePackage.pdf

- III. Once the fields are filled in, change the **Letter of Offer Status** field at the top of the Letter of Offer template to 'Create Letter of Offer' and click Save. A letter of offer will be generated and the **Letter of Offer Status** field will revert to 'Edit Mode'. This allows you to edit the fields and select 'Create Letter of Offer' again to re-create the letter.
- IV. Go back to the Current folder tab and refresh the screen. You will see a new .pdf document has appeared in the dossier having a file name format of: 'Lastname_Firstname_ApplicantID_Letter of Offer'
- V. Double click this .pdf file to open it and review the letter. Always review the letter before sending it.

❖ **Making Changes to a Letter of Offer:**

If you need to make changes to the editable field values in a letter of offer (i.e., you want to edit the **Areas of Responsibility** or the **Candidate Mailing Address**), you need to change the field values in the templates in which the data is housed. The letter of offer workflow pulls field values from either the Candidate Information template (on the yellow permanent folder) or the Letter of Offer template. Look in either of these to determine where to make your desired changes.

Once the changes are made, change the Letter of Offer status back to Create Letter of Offer and click Save. Go back to the Current Folder and refresh the screen. The revised Letter of Offer will have immediately overwritten the previous one.

❖ **Department Address and Chair's Name and Email:**

The department address that appears in the footer of the first page of each letter of offer and the Department Chair's name and title which are added to the salutation of the letter, are stored in a database located on the LaserFiche server. Department Coordinators do not have access to this database.

If this information needs to be edited please send an email request to discovery.common@utoronto.ca.

Appendix D: Email Templates

1. Faculty Email Request – ANNUAL REVIEW, NO ATTACHMENT

Subject: Activity Report Required – [Faculty First/Last Name], [Department Name]

Dear [First Name] [Last Name],

Thank you for your contributions to the Faculty of Medicine (FoM). You are receiving this email as a result of a new automated **annual review** process that is being implemented for all status-only faculty across the Faculty of Medicine. This request is being sent by the [Department Name], the department in which you hold your primary status-only academic appointment.

University guidelines require status-only faculty to report their academic activities on an annual basis. The activity report, available at the link below, is intended to summarize your academic activities for the last academic year, including any anticipated activities that may occur prior to June 30th of this year.

The activity report should take no more than 10-15 minutes to complete.

Once submitted, your activity report will be reviewed by the [Department Name] and any additional FoM departments in which you hold a concurrent status-only academic appointment. This activity report may also be shared with your Hospital/Research Institute, if applicable. If you do not hear from the [Department Name] or any other FoM Departments in which you hold additional status-only appointments by June 30th of this year, your appointment will remain active.

If you have been unable to actively participate in academic activities this past year due to personal reasons, please advise your Department Coordinator.

Please note that you will require the following information to successfully submit your activity report:

- Your Appointment ID: [Appointment ID #] (please copy and paste into the activity report)

- Your Last Name: [Last Name] (please copy and paste into the activity report)

To proceed with the annual review process, visit the link: [link]

Submission Deadline: May 01, 2016

If we have yet to receive your completed activity report, you may be receiving this notification for a second time. Please note that we are unable to proceed with your annual review until your activity report is submitted. Questions can be directed to the Department Coordinator at [Department Coordinator Email].

Thank you very much for taking the time out of your busy schedule to address this matter.

2. Faculty Email Request – ANNUAL REVIEW, ATTACHMENT

Subject: Activity Report Required – [Faculty First/Last Name], [Department Name]

Dear [First Name] [Last Name],

Thank you for your contributions to the Faculty of Medicine (FoM). You are receiving this email as a result of a new automated **annual review** process that is being implemented for all status-only faculty across the Faculty of Medicine. This request is being sent by the [Department Name], the department in which you hold your primary status-only academic appointment.

University guidelines require status-only faculty to report their academic activities on an annual basis. The activity report, available at the link below, is intended to summarize your academic activities for the last academic year, including any anticipated activities that may occur prior to June 30th of this year.

The activity report should take no more than 10-15 minutes to complete.

IMPORTANT: The [Department Name] requires its status-only faculty to provide documentation in addition to the online activity report. Please refer to any departmental attachment included in this email for further instruction. Following completion of the activity report, available at the link below, you will be prompted to attach the required additional departmental document(s).

Once submitted, your activity report and attachment will be reviewed by the [Department Name] and any additional FoM departments in which you hold a concurrent status-only academic appointment. This information may also be shared with your Hospital/Research Institute, if applicable. If you do not hear from the [Department Name] or any other FoM Departments in which you hold additional status-only appointments by June 30th of this year, your appointment will remain active.

If you have been unable to actively participate in academic activities this past year due to personal reasons, please advise your Department Coordinator.

Please note that you will require the following information to successfully submit your activity report:

- Your Appointment ID: [Appointment ID #] (please copy and paste into the activity report)
- Your Last Name: [Last Name] (please copy and paste into the activity report)

To proceed with the annual review process, visit the link: [link]

Submission Deadline: May 01, 2016

If we have yet to receive your completed activity report, you may be receiving this notification for a second time. Please note that we are unable to proceed with your annual review until your activity report is submitted. Questions can be directed to the Department Coordinator at [Department Coordinator Email].

Thank you very much for taking the time out of your busy schedule to address this matter.

3. Faculty Email Request – RE-APPOINTMENT, NO ATTACHMENT

Subject: Re-Appointment & Activity Report Required – [Faculty First/Last Name], [Department Name]

Dear [First Name] [Last Name],

Thank you for your contributions to the Faculty of Medicine (FoM). You are receiving this email as a result of a new automated **re-appointment** process that is being implemented for all status-only faculty across the Faculty of Medicine. This request is being sent by the [Department Name], the department in which you hold your primary status-only academic appointment.

University guidelines stipulate that status-only academic appointments must be for a fixed term and formally renewed prior to the end date. Status-only faculty are also required to report their academic activities on an annual basis. The activity report, available at the link below, is intended to summarize your academic activities for the last academic year, including any anticipated activities that may occur prior to June 30th of this year.

The activity report should take no more than 10-15 minutes to complete.

Once submitted, your activity report will be reviewed by the [Department Name] and any additional FoM departments in which you hold a concurrent Status-only academic appointment. This activity report may also be shared with your Hospital/Research Institute, if applicable. If your submission for the consideration of re-appointment is supported by the relevant Department Chair(s), review and approval must then be granted by the Faculty of Medicine. Following a successful review of your re-appointment submission, you will be contacted by the Department with a new status-only academic appointment letter of offer, normally no later than June 30th of this year.

If you have been unable to actively participate in academic activities this past year due to personal reasons, please advise your Department Coordinator.

Please note that you will require the following information to successfully submit your activity report:

- Your Appointment ID: [Appointment ID #] (please copy and paste into the activity report)

- Your Last Name: [Last Name] (please copy and paste into the activity report)

To proceed with the re-appointment process, visit the link: [link]

To decline re-appointment, visit the link: [link]

Submission Deadline: May 01, 2016

If we have yet to receive your completed activity report, you may be receiving this notification for a second time. Please note that we are unable to proceed with your annual review until your activity report is submitted. Questions can be directed to the Department Coordinator at [Department Coordinator Email].

Thank you very much for taking the time out of your busy schedule to address this matter.

4. Faculty Email Request – RE-APPOINTMENT, ATTACHMENT

Subject: Re-Appointment & Activity Report Required – [Faculty First/Last Name], [Department Name]

Dear [First Name] [Last Name],

Thank you for your contributions to the Faculty of Medicine (FoM). You are receiving this email as a result of a new automated **re-appointment** process that is being implemented for all status-only faculty across the Faculty of Medicine. This request is being sent by the [Department Name], the department in which you hold your primary status-only academic appointment.

University guidelines stipulate that status-only academic appointments must be for a fixed term and formally renewed prior to the end date. Status-only faculty are also required to report their academic activities on an annual basis. The activity report, available at the link below, is intended to summarize your academic activities for the last academic year, including any anticipated activities that may occur prior to June 30th of this year.

The activity report should take no more than 10-15 minutes to complete.

IMPORTANT: The [Department Name] requires its status-only faculty to provide documentation in addition to the online activity report. Please refer to any departmental attachment included in this email for further instruction. Following completion of the activity report, available at the link below, you will be prompted to attach the required additional departmental document(s).

Once submitted, your activity report and attachment will be reviewed by the [Department Name] and any additional FoM departments in which you hold a concurrent Status-only academic appointment. This information may also be shared with your Hospital/Research Institute, if applicable. If your submission for the consideration of re-appointment is supported by the relevant Department Chair(s), review and approval must then be granted by the Faculty of Medicine. Following a successful review of your re-appointment submission, you will be contacted by the Department with a new status-only academic appointment letter of offer, normally no later than June 30th of this year.

If you have been unable to actively participate in academic activities this past year due to personal reasons, please advise your Department Coordinator.

Please note that you will require the following information to successfully submit your activity report:

- Your Appointment ID: [Appointment ID #] (please copy and paste into the activity report)
- Your Last Name: [Last Name] (please copy and paste into the activity report)

To proceed with the re-appointment process, visit the link: [link]

To decline re-appointment of your academic appointment, visit the link: [link]

Submission Deadline: May 01, 2016

If we have yet to receive your completed activity report, you may be receiving this notification for a second time. Please note that we are unable to proceed with your annual review until your activity report is submitted. Questions can be directed to the Department Coordinator at [Department Coordinator Email].

Thank you very much for taking the time out of your busy schedule to address this matter.

Appendix E: Letter of Offer Samples

1. Status-only Re-Appointment Offer Letter
2. Status-only Re-Appointment Offer Letter for Primary Clinical Faculty