

Clinical Annual Re-appointment for Part-time and Adjunct Clinical Academics Instructions for Re-appointment Eligibility Review

These instructions show how to run a search in the Permanent Record area of the Laserfiche Appointments Repository for all Part-time and Adjunct Clinical Academics' dossiers, listing the End Dates and Email Addresses in the results window.

This should be undertaken prior to initiating the clinical annual re-appointments process for Part-time and Adjunct Clinical Academics (Clinical ARA).

This activity gives the Department the opportunity to ensure that all Part-time and Adjunct Clinical Academics' appointments 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 renew their academic appointment.

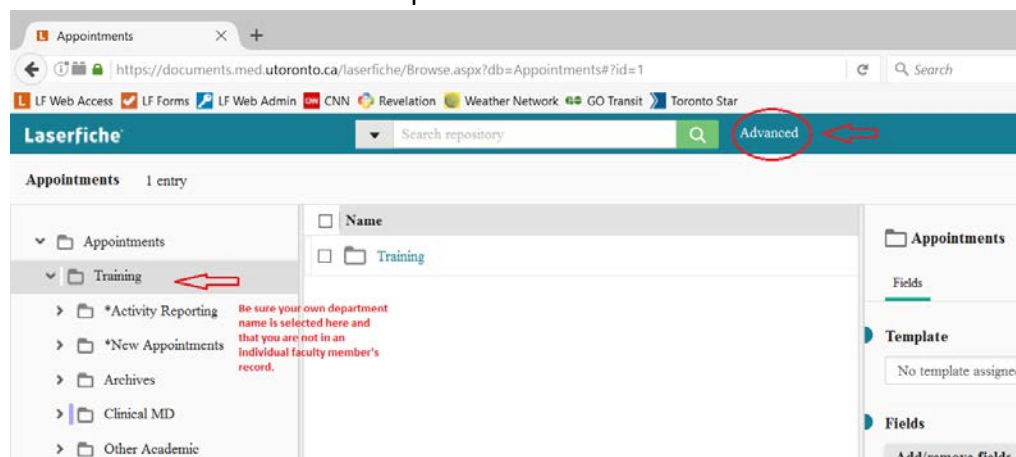
A. Search the Permanent Record Area (see illustration below)

- 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\Clinical MD",
SUBFOLDERS=0} & ({[]:[Academic Appointment Category]="Clinical MD
PartTime"}){[]:[Academic Appointment Category]="Clinical Adjunct"}**

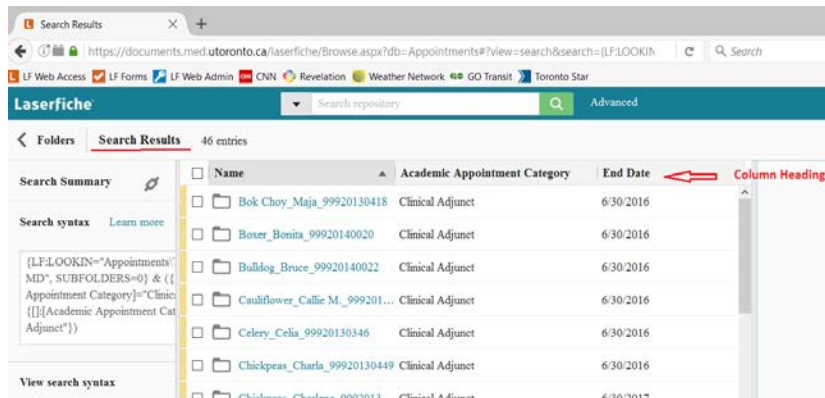
Note: It is very important that, in the query above, you change the text \YOURDEPARTMENTNAME\ to your actual department name as it exists in Laserfiche. (e.g. \Ophthalmology and Vision Sciences\)

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.

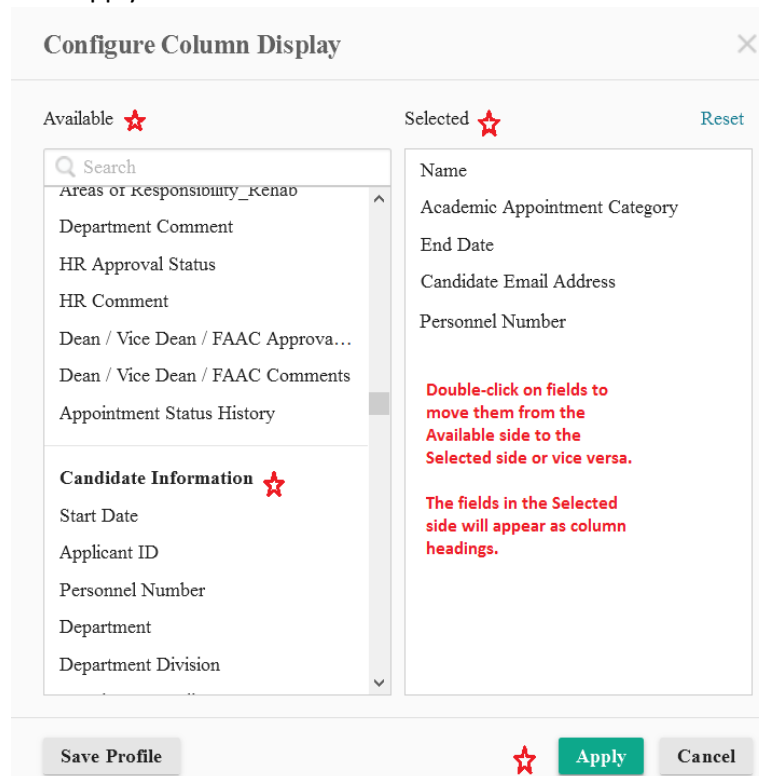
- iii. Click Search

The screenshot shows the 'Advanced Search' window. At the top, there's a 'Search Types' section with a dropdown menu set to 'Add search type' and a 'Saved Searches' dropdown. Below this is a 'Field' section with a 'Choose template' dropdown and a 'Choose Fields' button. The 'Date' section has a 'Last modified' dropdown and a '(Select)' dropdown. The 'Search syntax' section is highlighted with a blue border and contains the following query: `{LF:LOOKIN="Appointments\Paediatrics\Clinical MD", SUBFOLDERS=0} & ({[]:[Academic Appointment Category]="Clinical MD PartTime"}){[]:[Academic Appointment Category]="Clinical Adjunct"}`. At the bottom, there are buttons for 'Save', 'Show search syntax', 'Search', and 'Reset'.

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



- b. In the Configure Column Display box that appears
 - i. Under the Available side, scroll down to the fields under the Candidate Information template.
 - ii. One-by-one double-click on the fields Academic Appointment Category, End Date, Candidate Email 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



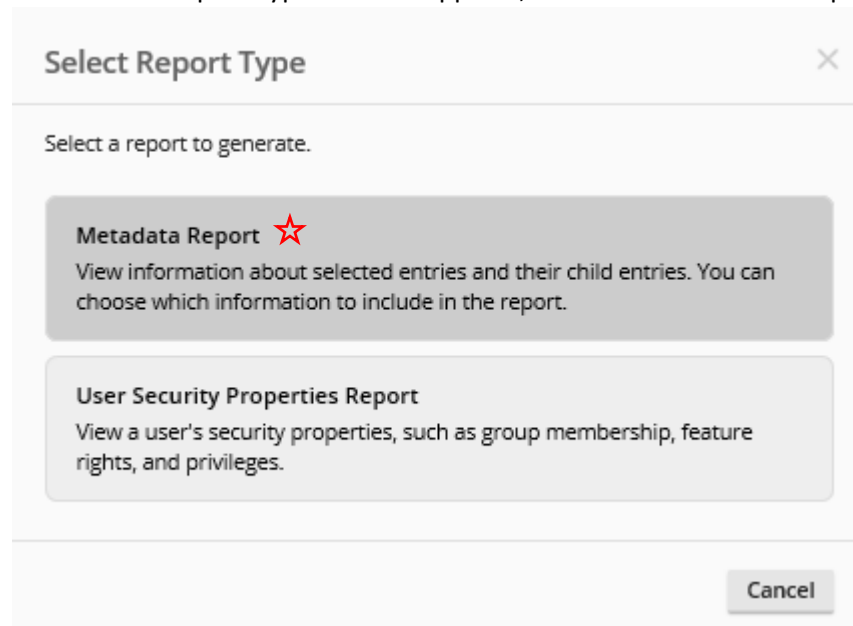
- iv. When you see the results page come up, sort the results list as you prefer by double-clicking on column headings.

C. Download the Report to Excel

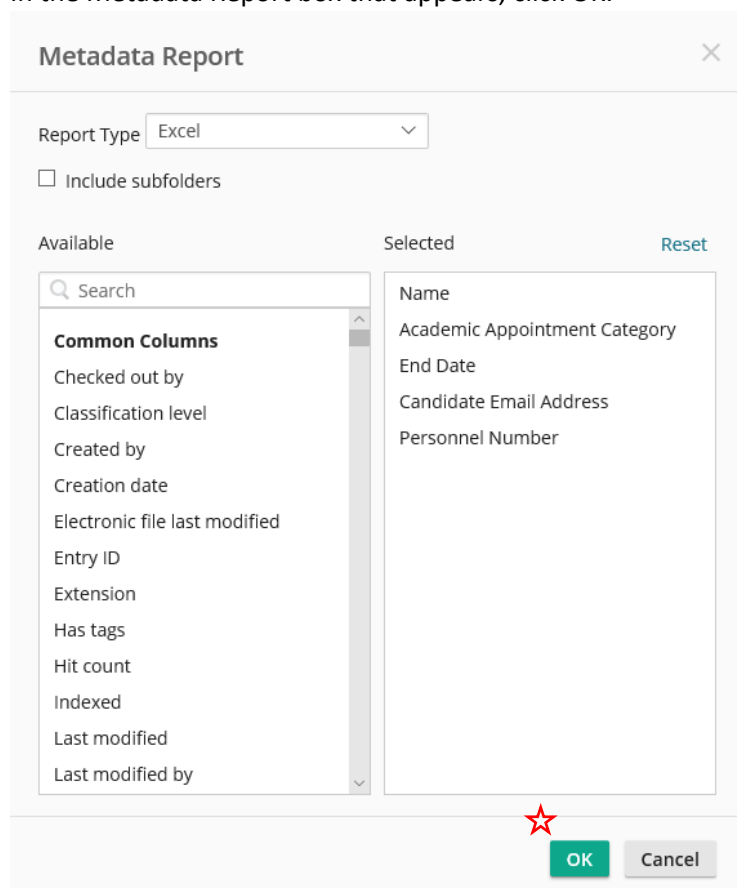
- a. When you have the columns sorted the way you like, click on the Generate Report button to download the results to Excel.



- b. In the Select Report Type box that appears, click on the Metadata Report button.

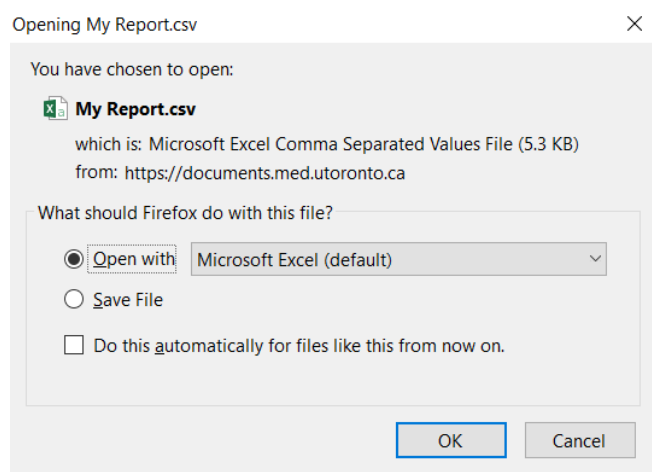


- c. In the Metadata Report box that appears, click OK.



The screenshot shows a 'Metadata Report' dialog box with a close button (X) in the top right corner. It features a 'Report Type' dropdown menu set to 'Excel' and an unchecked checkbox for 'Include subfolders'. Below these are two columns: 'Available' and 'Selected'. The 'Available' column has a search bar and a list of 'Common Columns' including 'Checked out by', 'Classification level', 'Created by', 'Creation date', 'Electronic file last modified', 'Entry ID', 'Extension', 'Has tags', 'Hit count', 'Indexed', 'Last modified', and 'Last modified by'. The 'Selected' column lists 'Name', 'Academic Appointment Category', 'End Date', 'Candidate Email Address', and 'Personnel Number'. A 'Reset' link is located to the right of the 'Selected' column. At the bottom, there are 'OK' and 'Cancel' buttons. A red star is placed above the 'OK' button.

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



The screenshot shows a file opening dialog box titled 'Opening My Report.csv'. It displays the file 'My Report.csv' as a 'Microsoft Excel Comma Separated Values File (5.3 KB)' from the URL 'https://documents.med.utoronto.ca'. Below this, it asks 'What should Firefox do with this file?' with three options: 'Open with' (selected), 'Save File', and 'Do this automatically for files like this from now on.' (unchecked). The 'Open with' option has a dropdown menu showing 'Microsoft Excel (default)'. At the bottom, there are 'OK' and 'Cancel' buttons.

- e. This Excel file will generate outside of Laserfiche.

D. Review the End Dates

a. Dossiers without End Dates:

Any Part-time and Adjunct Clinical Academic 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 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 Clinical MD folder in the left panel. Put a check mark beside the person's dossier in the centre panel and the Candidate Information 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 template, only one person's dossier can be selected (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 Plus sign beside your Department folder to expand it.
- iii. Single click on the Plus sign 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 Plus sign beside the Clinical MD folder to expand it.
- vi. Drag the permanent dossier from under Clinical MD 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.**

E. 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 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 Clinical MD folder in the left hand panel. Put a check mark beside the person's dossier in the centre panel and the Candidate Information 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 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.

F. Save Excel File

It is recommended that the exported excel file is used as a working file to verify faculty eligible for 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.**