New Appointments in MyInfoVault

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Creating the New Appointment

- New appointments can now be created in MIV, both for individuals new to the Davis campus and for individuals holding a UCD staff position

- Do NOT create an account in MIV for the appointee

- Do NOT create a Temporary Affiliate Account

- Individuals already in an academic position would be processed as an Appointment via Change in Title

- You may upload information into the new appointment and/or use the data entry feature in MIV

- New appointments are initiated from the department admin's home page and can be created only for an appointee in your home department or cluster

- If you want to do a sample action of any kind, do NOT use production. Instead, use http://mivdemo.ucdavis.edu/

Creating the New Appointment

Creating the Appointment Form (also known as the Recommended Action Form or RAF)

- Step 1: choose the delegation of authority and effective date

Creating the Appointment Form

- When choosing the delegation of authority, refer to https://academicaffairs.ucdavis.edu/dofa.cfm

- The delegation of authority dictates who makes the final decision on the action, and what path it takes in the MIV workflow

- Redelegated action decisions are made by the Dean or the Vice Chancellor of the School/College

- Non-redelegated action decisions are made by the Vice Provost of Academic Affairs, or the Provost or Chancellor

Creating the Appointment Form

- Step 2: Fill in Candidate Information

Creating the Appointment Form

- There are four questions on the Candidate Information section

- If you answer "no" to question #1, questions 2-4 "gray out" and you do not answer them

- You will have to type in the candidate's name (first*, middle and last*) and you should enter it in the way it will eventually be entered into the Payroll/ Personnel System

* = required data entry

Creating the Appointment Form

> By selecting "no" you skip over questions 2-4 and enter the candidate's name in the same way it will be entered into the Payroll/Personnel System

▸ **Redelegated New Appointment effective July 1, 2014**

▾ **Candidate Information**

1. Is this a current UC Davis employee? ✱
○ Yes ⊙ No

If no, skip to complete proposed section. If yes, go to question 2.

2. Is this employee represented?
○ Yes ○ No

If no, skip to complete present and proposed sections. If yes, notice to the union may be required under certain collective bargaining agreements; go to question 3.

3. Is notice to the union required?
○ Yes ○ No

If no, skip to complete present and proposed sections. If yes, go to question 4.

4. Have you notified labor relations about this proposed change in appointment?
○ Yes ○ No

If no, contact labor relations and/or your dean's office prior to proceeding with this appointment. If yes, proceed to complete present and proposed sections.

Appointee Name
✱ First Name: [_____]   Middle Name: [_____]   ✱ Last Name: [_____]

▸ **Appointment Details**

[Save] [Cancel]

Creating the Appointment Form

- If you answer "yes" to question #1, go to question #2

- If you answer "no" to question #2, questions 3-4 will "gray out" and you will go to Appointee Name

- You must search for the appointee (from the campus LDAP) and select their name, being sure to select the correct name if there is more than one choice

Creating the Appointment Form

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3. Is notice to the union required?
○ Yes ○ No

If no, skip to complete present and proposed sections. If yes, go to question 4.

4. Have you notified labor relations about this proposed change in appointment?
○ Yes ○ No

If no, contact labor relations and/or your dean's office prior to proceeding with this appointment. If yes, proceed to complete present and proposed sections.

Appointee Name

Search: [thonen]   ✱ First Name: [   ]   Middle Name: [   ]

✱ Last Name: [   ]

▶ **Appointment Details**

[Save] [Cancel]

Creating the Appointment Form

- If you answer "yes" to question #2, go to question #3

- If you answer "no" to question #3, question 4 will "gray out" and you will go to Appointee Name

- You must search for the appointee (from the campus LDAP) and select their name, being sure to select the correct name if there is more than one choice

Creating the Appointment Form

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> **Candidate Information**

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   ◉ Yes ○ No

   If no, skip to complete proposed section. If yes, go to question 2.

2. **Is this employee represented?**✱
   ◉ Yes ○ No

   If no, skip to complete present and proposed sections. If yes, notice to the union may be required under certain collective bargaining agreements; go to question 3.

3. **Is notice to the union required?**✱
   ○ Yes ◉ No

   If no, skip to complete present and proposed sections. If yes, go to question 4.

4. **Have you notified labor relations about this proposed change in appointment?**
   ○ Yes ○ No

   If no, contact labor relations and/or your dean's office prior to proceeding with this appointment. If yes, proceed to complete present and proposed sections.

Appointee Name

Search: [thonen] ✱ First Name: [   ] Middle Name: [   ]

✱ Last Name: [   ]

> **Appointment Details**

[Save] [Cancel]

Creating the Appointment Form

- If you answer "yes" to question #3, go to question #4

- If you answer "no" to question #4, you will get a red message notifying you that you must "Contact labor relations and/or your dean's office prior to proceeding with this appointment."

- If you answer "yes" to question #4, search for and select the candidate's name in LDAP making sure to select the correct name if there is more than one choice
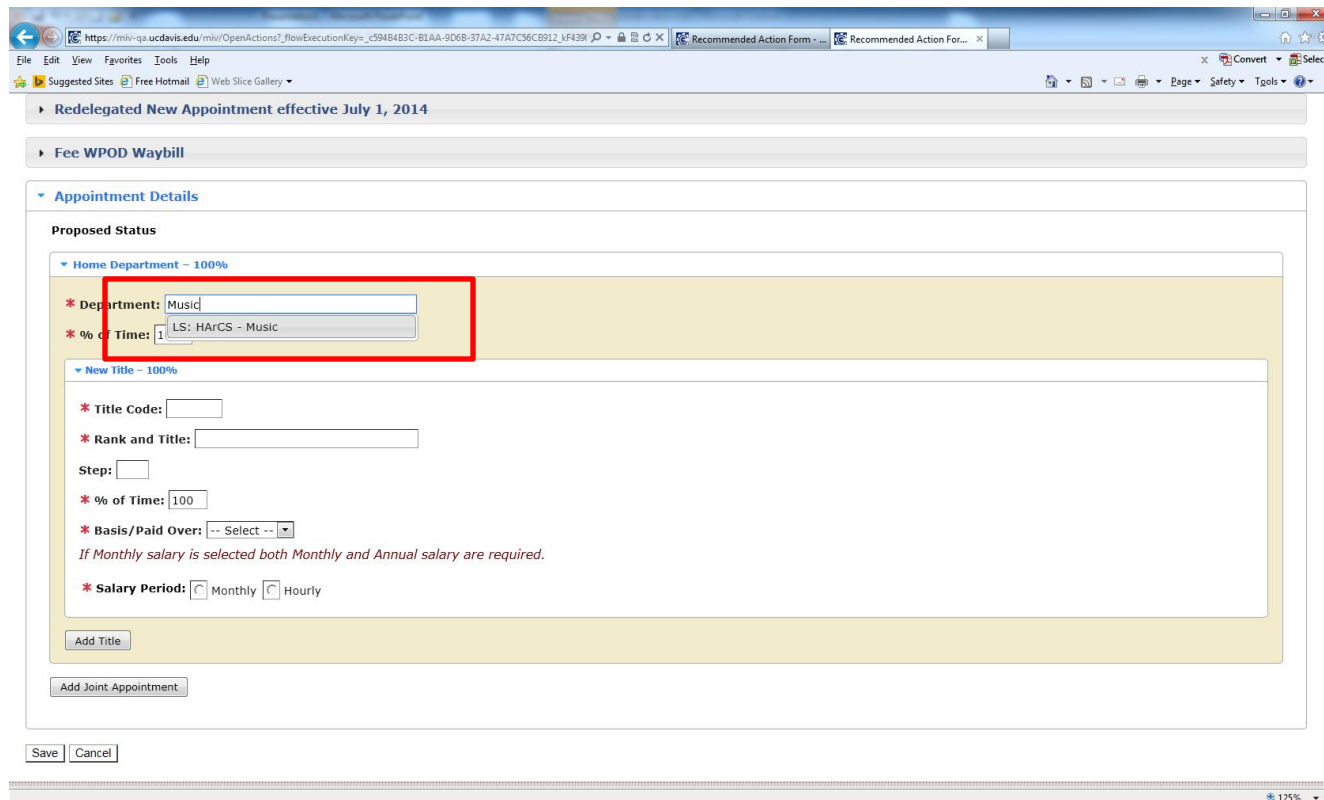
Creating the Appointment Form

- Step 3: Fill out present and/or proposed status details

- If your appointee is a current UC Davis employee ("yes" to   question #1), you will need to enter data for both the appointee's "present status" (current staff position) and "proposed status" (new academic appointment)

- You may enter more than one present title (for example, SRA and analyst if they are currently a staff member with two titles)

- You may enter more than one proposed title (for example, Professor and "Ecologist" in the Agricultural Experiment Station)

- You must also enter any joint appointments at this time

- Totals for all appointments must add up to the overall total (i.e., if they are proposed at 100%, all appointments (home and joint(s)) must add up to 100%)

- Data is required everywhere there is a *

Creating the Appointment Form

- When adding joint appointments, it is recommended that you know in advance the proposed home and joint departments, and the order in which you want them to appear on the Appointment form

- If you have to edit the home/joint department AFTER the dossier has been created and items in the dossier have been uploaded, all uploaded documents will automatically be deleted when you correct the Appointment form

- You CAN edit other fields on the Appointment form and everything will remain in place as long as the home and joint departments are not edited

Creating the Appointment Form

- For both present and proposed status, when entering the department, begin typing the name of the department and select the name of the department once MIV has prepopulated the information (which shows both the name of the school/college and the department)

Creating the Appointment Form

Creating the Appointment Form

- If the appointee is new to the Davis campus, you will only have to enter their "proposed" status

For individuals new to the campus

Creating the Appointment Form

- Continue filling in the rest of the information on the Appointment form

- The Title Code must be four digits

- If Above Scale, enter AS for "step"

- Be sure to enter any joint appointment(s) at this time

- If the Appointment form is not completely filled out, you will get a large red error message specifically stating which items are missing

- Once all of the data is entered correctly, hit the "save" button and your appointment will be created at the department level

Managing the New Appointment

- Once the action is at the department, it is managed in the same way as any other action at the department level
- If there is a joint action, it is automatically sent to the joint department (same as merits & promotions)
- One difference is that there is no candidate's disclosure certificate to be signed
- Another difference is that a signed biography form is required
- A third difference is that the dossier is separated into two sections:
  - The Candidate's Packet (the candidate's data)
  - Departmental information (letters added by the department)

Open Action

Fee WPOD Waybill
LS: HArCS - Music
Redelegated: New Appointment 2014 *Submitted on 02/11/2014, 4:34 PM*
Department Location *Last Routed on 02/11/2014, 4:34 PM*

View the Dossier as One PDF File

View the Signature Log

Primary Appointment: LS: HArCS - Music
Primary Appointment processing: In Progress

Appointment Form	Add/Edit		View: Appointment Form
Department Letter/Division Chief Letter	Add	Delete	**Required - Not Added**
Department Letter Federation Vote	Add	Delete	Optional - Not Added
Department Peer Group Letter for Federation	Add	Delete	Optional - Not Added
Extramural Letter(s)	Add	Delete	Optional - Not Added
Reviewing (Assign Reviewers)	Open	Close	Optional - Not Open
Voting Period	Open	Close	Optional - Not Open

Candidate Packet:

Candidate's Statement	Add	Delete	Optional - Not Added
Candidate's Diversity Statement	Add	Delete	Optional - Not Added
Position Description	Add	Delete	Optional - Not Added
Org Chart	Add	Delete	Optional - Not Added
List of Student Evaluations	Add	Delete	Optional - Not Added
Extending Knowledge	Add	Delete	Optional - Not Added
List of Service	Add	Delete	Optional - Not Added
Biography Form	Add	Delete	**Required - Not Added**
Publications	Add	Delete	Optional - Not Added
Creative Activities	Add	Delete	Optional - Not Added
Contributions to Jointly Authored Works	Add	Delete	Optional - Not Added
Contributions to Jointly Created Works	Add	Delete	Optional - Not Added
Honors and Awards	Add	Delete	Optional - Not Added
Grants and Contracts	Add	Delete	Optional - Not Added

Joint Appointment: LS: HArCS - Theatre and Dance
Joint Appointment processing: In Progress   (Has Not Been Sent to Primary Department)

Department Letter/Division Chief Letter	Add	Delete	**Required - Not Added**
Department Letter Federation Vote	Add	Delete	Optional - Not Added
Department Peer Group Letter for Federation	Add	Delete	Optional - Not Added
Reviewing (Assign Reviewers)	Open	Close	Optional - Not Open
Voting Period	Open	Close	Optional - Not Open

Return This Dossier to the Candidate (No documents/letters will be visible to the Candidate, nor will they be deleted from the dossier)

Send This Dossier to the School/College

Departmental uploads

This is the candidate's data, which can be uploaded as a PDF or entered as data

Joint Appointment

Managing the New Appointment

- Using the appropriate checklist for the appointee's series (which can be found at

  https://academicaffairs.ucdavis.edu/resources/forms_checklists/index.html) you may upload PDF items to the dossier by clicking on the "add" button next to the item in the Candidate's Packet section of the open action, which will prompt you as follows:

Add "List of Service" PDF Upload

* = Required Field

John Forrest Stewart

* Upload PDF File:

[   ] [Browse...]

Create an optional custom name for this file (default will be "List of Service" if no custom name is entered):

[   ]

[Upload PDF File] [Cancel]

Managing the New Appointment

- As with all other uploads in MIV, the item must be saved and/or scanned and uploaded as a PDF

- Browse your files and select the item you wish to upload

- You may create a custom name for the file (such as Stewart Bio 2014), or MIV will give it a default name

- Click "Upload PDF file" to complete the upload

Managing the New Appointment

- You may also add data into the dossier including data in the teaching categories, which would create a Teaching, Advising and Curricular Development form

- The dossier can be created using both uploads and data entry (one would follow the other in the PDF of the created dossier)

- To enter data into the dossier, return the dossier to the candidate's level by clicking "Return The Dossier to the Candidate" at the bottom of the open action page

Managing the New Appointment

Open Action

John Forrest Stewart
LS: Social Science - History
Redelegated: New Appointment 2014 *Submitted on 02/11/2014, 3:53 PM*
Department Location *Last Routed on 02/11/2014, 3:53 PM*

View the Dossier as One PDF File

View the Signature Log

Primary Appointment: LS: Social Science - History
Primary Appointment processing: In Progress

Appointment Form	Add/Edit		View: Appointment Form
Department Letter/Division Chief Letter	Add	Delete	**Required – Not Added**
Department Letter Federation Vote	Add	Delete	Optional - Not Added
Department Peer Group Letter for Federation	Add	Delete	Optional - Not Added
Extramural Letter(s)	Add	Delete	Optional - Not Added
Reviewing (Assign Reviewers)	Open	Close	Optional - Not Open
Voting Period	Open	Close	Optional - Not Open

Candidate Packet:

Candidate's Statement	Add	Delete	Optional - Not Added
Candidate's Diversity Statement	Add	Delete	Optional - Not Added
Position Description	Add	Delete	Optional - Not Added
Org Chart	Add	Delete	Optional - Not Added
List of Student Evaluations	Add	Delete	Optional - Not Added
Extending Knowledge	Add	Delete	Optional - Not Added
List of Service	Add	Delete	Optional - Not Added
Biography Form	Add	Delete	View: Biography Form
Publications	Add	Delete	Optional - Not Added
Creative Activities	Add	Delete	Optional - Not Added
Contributions to Jointly Authored Works	Add	Delete	Optional - Not Added
Contributions to Jointly Created Works	Add	Delete	Optional - Not Added
Honors and Awards	Add	Delete	Optional - Not Added
Grants and Contracts	Add	Delete	Optional - Not Added

Return This Dossier to the Candidate (No documents/letters will be visible to the Candidate, nor will they be deleted from the dossier)

Send This Dossier to the School/College

Managing the New Appointment

- When you return the dossier to the candidate, you will get the following confirming message:

- You then proxy the candidate by clicking "Select a User's Account" and typing in the applicant's name (same as for a regular MIV candidate)

Managing the New Appointment

- As a proxy for a new applicant, you will get a different home screen than for an existing MIV candidate:

Enter Data ▾   My Dossier ▾   CV & Biosketches ▾   Actions ▾   Reports ▾   Preferences ▾   Ω | **Crystal Y Barber**

(John Forrest Stewart) Return to My Account

🏠 Home > Data Entry

Data Entry

Personal Information
- Areas of Interest
- Personal Information
- Additional Information

Ag. Experiment Station

Candidate's Statements
- Candidate's Statement
- Diversity Statement

Creative Activities
- Works
- Events
- Publication Events
- Reviews by Others
- Additional Information

Education
- Education/Training
- Licenses and Certifications
- Additional Information

Employment
- Employment History
- Additional Information

Extending Knowledge
- Broadcast, Print or Electronic Media
- Workshops, Conferences, Presentations and Short Courses
- Other
- Upload a PDF

Grants and Contracts

Honors and Awards

List of Evaluations

Position Description

Publications
- Import Data
- Abstracts
- Alternative Media
- Books Authored
- Book Chapters
- Books Edited
- Books Reviewed
- Journals
- Letters to the Editor
- Limited Distribution
- Patents
- Presentations
- Additional Information

Service
- Administrative Activities
- Committees
- Editorial and Advisory Boards
- Additional Information

Teaching
- Contact Hours
- Courses
- Curricular Development
- Desii Report
- Lecture/Seminar/Lab/Other
- Special Advising
- Student Advising
- Thesis Committees
- Trainees
- University Extension
- Additional Information

Managing the New Appointment

- Data is entered and annotated in the same fashion as for a regular MIV candidate
- Items may be uploaded as a PDF (i.e., candidate's statement), entered as data (publications, service), or entered as additional information (teaching, research or service > additional information)
- If you add any information at this level, you must "create the dossier" before you send it back to the department
- After the dossier is created, you send the dossier to the department
- If no data is added, you can send it back to the department without creating the dossier

Managing the New Appointment

- Once the dossier is back at the department, return to your account and manage the open action in the usual fashion
- Double check to make sure that you have either uploaded information or entered data in the appropriate categories required for the series and step (by using the "View the Dossier as One PDF File" link)
- Complete the required uploads (department letter, candidate's biography form)
- Once the required items are uploaded, and any joint actions have been returned to the home department, all red items will turn green, the action will be "complete" and the "Send this Dossier to the School/College" link will become active
- Click on that link and the department portion of the appointment is complete

Managing the New Appointment

- Once the dossier has been sent to the Dean's Office, they will complete their review following the same process as merits and promotions

- Dossiers may be returned to the department for corrections, including corrections to the delegation of authority

- When all items at the Dean's Office are complete, they will forward the dossier to the Vice Provost's Office for further review (non-redelegated actions) or archiving (redelegated actions)