

## OVERVIEW TAB JOB AID

### Case Header:

The header will auto-populate the effective date of the case, action, review period, Employee ID, Affiliate ID, CalNet UID, department(s), and a Review Progress bar. The Review Progress bar indicates the current phase of review. In addition, the banner displays the next routing action.

2015 Merit for [Redacted]

Emp ID: [Redacted] | Aff ID: None | CalNet UID: [Redacted]

In Progress  
Review Period: 07/2015 to 06/2013  
Integrative Biology  
Candidate Summary Initiated

Department **current** > Dean upcoming > Campus upcoming > Decision upcoming

Dept analyst: [Open Case To Candidate](#) [Refresh Case](#) [Delete Case](#)

Overview | Candidate Summary | Recommendation Overview | Salary Recommendation | Documents | Departmental Review | Reviewers | Routing Log

### The Overview tab:

The Overview tab serves as your launch page. Please note the Overview tab is not accessible to the candidate, faculty reviewer, ad hoc chair, or ad hoc member(s).

Overview | Candidate Summary | Recommendation Overview | Salary Recommendation | Documents | Departmental Review | Reviewers | Routing Log

Job Appointments: Integrative Biology (L&S Biological Sciences)  
Change Appointments  
FTE: 1.00

Timeliness

[Save](#)

Information

Case Action: Merit  
Effective Date: 07/01/2015  
Accel/Decel: [Dropdown]  
Career Equity Review:  Yes  No

Analysts

Dept Analyst: [Dropdown]  
Dean Analyst: [Dropdown]

Case Notes

General: [Text Area]

Competing Offer/Retention

New Competing Offer/Retention

[Save](#)

## Step 1: Job Appointments

Examine the "Job Appointments" field and ensure the appropriate departments are listed. The correct FTE percentage is required and will not be auto-populated. To change either the department(s) or FTE click the **"Change Appointments"** link. A new screen will open and you may update the org code and/or FTE percentage, and then click the "Update" button.

Please note, in joint appointment cases each department must be entered in "Change Job Appointments" for the other department(s) to have case access.

Department	%
IBIBI - Integrative Biology	100
	0
	0
	0
	0

## Step 2: The Information section

Next, complete the "Information" section, if applicable. The "Case Action" and "Effective Date" are derived values. If you need to change either field, contact APO. Using the drop down menu select "Acceleration" or "Deceleration", if applicable, and using the radio buttons select "Yes" or "No" for "Career Equity Review".

Case Action: Merit

Effective Date: 07/01/2015

Accel/Decel:

Career Equity Review:  Yes  No

### Step 3: Appointment Cases (Please disregard for all other actions)

Under "Appointment Cases" select "Search Authorization" (FTE #) or the "Search Waiver" radio button. If you select "Search Authorization" the "Search Auth #" and "JPF AP Recruit #" fields will appear. Complete these fields. If you select "Search Waiver" the "Search Waiver Number" field appears, complete this field.

Appointment Cases

Search Type  Search Authorization  Search Waiver

Search Auth #

JPF AP Recruit #

OR

Appointment Cases

Search Type  Search Authorization  Search Waiver

Search Waiver Number

### Step 4: Designate the Department Analyst

Using the drop down menu you may select the desired Department Analyst. Also at this time, you may enter case notes as needed.

Analysts

Dept Analyst

Dean Analyst

Case Notes

General

Once you have completed filling out the fields in the Overview tab click the "Save" button located at the top and bottom of the page.

### Step 5: Competing Offers/Retentions

Please click on the "New Competing Offer/Retention" link. A new page will open. Fill out the "Institution", "Salary Type" (either Academic or Fiscal Year), and the corresponding salary amounts. Click "Save" once you have complete this section.

New Competing Offer/Retention

Institution

Salary Type

Academic Year Salary

The competing offer/retention will display in Overview tab in the format below. Please note you may enter multiple competing offers/retentions.

Competing Offer/Retention

New Competing Offer/Retention

Action	Institution	Academic Year Salary	Fiscal Year Salary	Equivalent 9 Month Salary
<a href="#">Edit</a>   <a href="#">Delete</a>	University of APBears	\$100,000.00		