

FHS DB RENEWAL PROCESS WORKFLOW: PRIOR TO FACULTY SIGN-OFF (CENTRAL PROCESS)

TARGET AUDIENCE: ACADEMIC COORDINATORS

Updated December 13, 2024

OVERVIEW

This document outlines how Department Academic Coordinators will use the **FHS DB Renewal Dashboard** to review and set decisions in preparation for sending to faculty for your department’s part-time appointment renewals.

If you have faculty at distributed/regional sites, follow this document for the faculty members that you will process (i.e., Hamilton-based), and for the faculty associated with a distributed/regional site, please see [Renewal Dashboard – Steps to Decision Review \(Distributed Process\)](#) (see the Renewal Dashboard section).

ACCESS AND SECURITY

- Department Academic Coordinators will have access to all faculty members in their **department**.
- As the Central Academic Coordinator, you will have edit access to all new applications and applications that are assigned to you.
- When you send an application to another reviewer, your access to that record will become read-only and the reviewer’s access will become edit. You will regain edit access when they send it back to you.

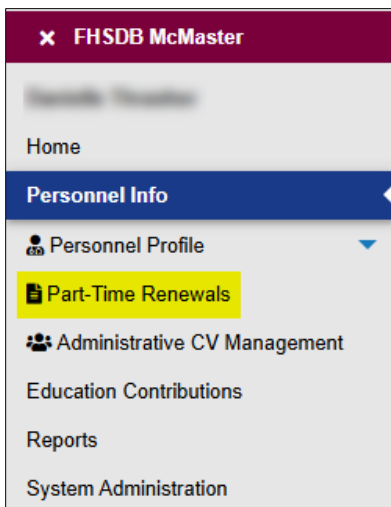
LOGIN TO FHS DB

Login to the system using your MacID/password. If you have any questions about how to login, refer to this user guide on our website: [How to Login to FHS DB](#).

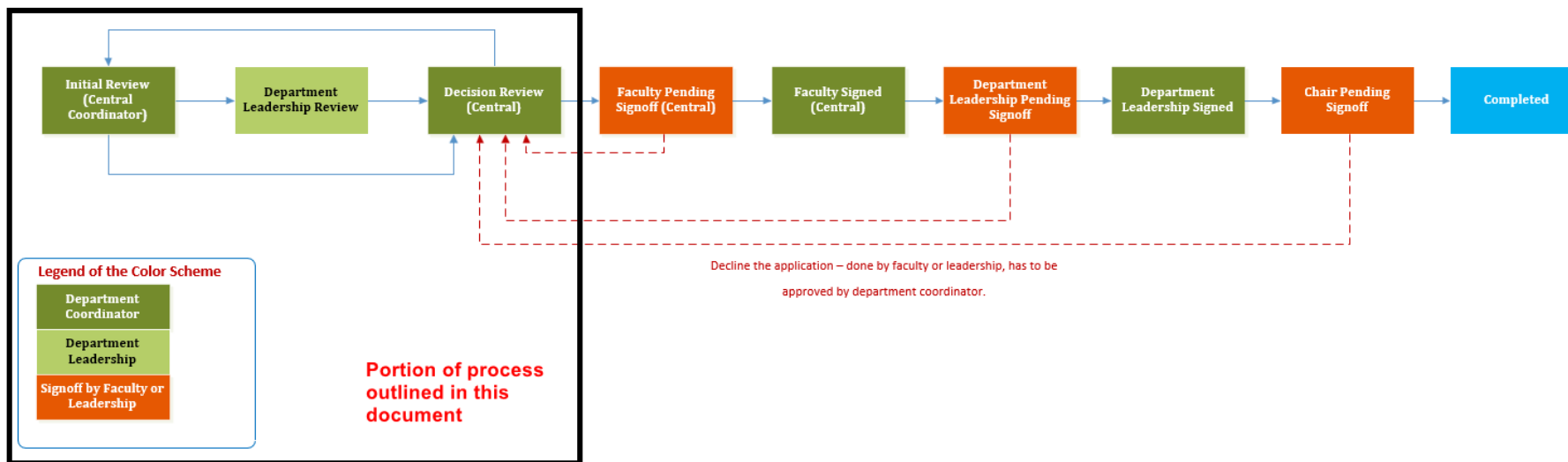
RENEWAL DASHBOARD

NAVIGATING TO THE DASHBOARD

On the left sidebar menu, you will see an item called “Personnel Info”. Under Personnel Info, you will see a subheading for Part-Time Renewals:



OVERALL WORKFLOW OF REVIEW AND APPROVAL



The steps outlined in this document are contained within the black box in the flowchart above. For each step, follow the arrows to see the next available steps, and who the application sits with once you have submitted to that step.

The next pages contain details about each step and how to use the Renewal Dashboard to move through these steps.

REVIEW YOUR LIST OF FACULTY

Please review your list and confirm that you are able to see all of your department’s renewal candidates in the Renewal Dashboard.

If you notice:

Anyone that is assigned to you but should be assigned to a Regional Academic Coordinator	Submit them to Initial Review (Distributed Coordinator) and select the Regional Academic Coordinator for the region
Anyone that is assigned to a Regional Academic Coordinator but should be assigned to you	Reach out to the appropriate Regional Academic Coordinator so that they can submit to you as Initial Review (Central Coordinator)
Anyone is missing from your list entirely	Please follow up with the FHS DB team

FILTERING THE DASHBOARD

You can use the search options to filter your dashboard by a number of parameters.

1. To move multiple applications to another step at the same time, all applications must be at the same **Step**.
2. When moving to Decision Review, the applications should have a decision assigned, so you may want to filter by Decision.
3. You may also want to review and move adjuncts separately from part-time, so you may want to filter by Rank.

ONLY MY ITEMS

Underneath the search parameters, we have added a checkbox labelled, “Only My Items”. If you check this box, the dashboard will show you only those applications which are currently assigned to you as Reviewer:

Only My Items ← Click to filter your list to include only those that are assigned to you Search Reset Export

Change to PT Change to Adjunct Renew Promote Lapse Undo Last Change Copy Email Submit

Showing 1 to 25 of 100 entries (filtered from 417 total entries) Filter

<input type="checkbox"/>	Faculty Name	Email	Department	Division	Rank	Primary Location	College ID Type	College ID	License Verified	Contribution Hours (3 years)	Status	Step	Reviewer	Decision	Renewal Term (years)	Faculty Last Login	Last Updated
<input type="checkbox"/>	[Redacted]	[Redacted]	Family Medicine	Division of Family Medicine	Assistant Clinical Professor	Hamilton Region	CPSO	[Redacted]	Yes	3027	Pending Department	Decision Review (Central Coordinator)	Thrasher, Danielle	Renew	3	2024-12-11	2024-12-10 10:44am

MOVING THROUGH THE STEPS

INITIAL REVIEW (CENTRAL COORDINATOR)

This is the start of your process. Keep applications in the Initial Review (Central Coordinator) step while you are verifying information, confirming contributions, and conducting offline review with the department leadership responsible for making renewal decisions.

Step	Status	Application sits with	Information	Available Next Steps
<div style="background-color: #76923c; color: white; padding: 5px; text-align: center;"> Initial Review (Central Coordinator) </div>	<div style="background-color: #76923c; color: white; padding: 5px; text-align: center;"> Pending Department </div>	Department Academic Coordinator	<p>All renewal candidates will begin at this step and be accessible only to the Department’s Academic Coordinator (Central Coordinator).</p> <p>Things you can do in this step:</p> <ul style="list-style-type: none"> -Send regional faculty to the Regional Academic Coordinator (Distributed Coordinator) -Complete info verification -Assign decisions -Send to Leadership for review -Send to Decision Review (Central). <p>From that step, you will be able to submit to faculty for sign-off.</p>	<div style="background-color: #4a7ebb; color: white; padding: 5px; text-align: center;"> Initial Review (Distributed Coordinator) </div> <p>This step is required to allow Regional Academic Coordinators to access their faculty and complete their portion of the review and sign-off process.</p>
				<div style="background-color: #92c04a; padding: 5px; text-align: center;"> Department Leadership Review </div> <p>Send to the department leadership to review within the dashboard (optional)</p>
				<div style="background-color: #76923c; color: white; padding: 5px; text-align: center;"> Decision Review (Central) </div> <p>Send here when application is ready to be sent to faculty for sign-off</p>

DEPARTMENT LEADERSHIP REVIEW (OPTIONAL)

This step allows you to send applications to the department leadership for review *within* the dashboard. This step is *optional* because you may complete this step outside of the dashboard, for example, by meeting with the department leadership or sending them a spreadsheet for review.

Step	Status	Application sits with	Information	Available Next Steps
Department Leadership Review	Pending Department	Department Leadership (DEC or equivalent role in process)	The Department Leadership can review within the dashboard when the Department Academic Coordinator selects this step and submits to them.	Decision Review (Central)



Please note, for any applications you submit to Department Leadership Review, your access will become *read-only* (viewable on dashboard only). You will **lose** access to *edit* the application and *move* it through to the next steps in the process **until** the Department Leadership sends it back to you.

DECISION REVIEW (CENTRAL COORDINATOR)

This is the step that indicates that review is complete and a decision has been made. It is only from this step that you can submit to the faculty member for sign-off. You can use this step to differentiate between faculty members who are not finalized (by keeping at Initial Review) and faculty members with decisions.

Step	Status	Application sits with	Information	Available Next Steps
Decision Review (Central)	Pending Department	Department Academic Coordinator	This step means the application is ready to be sent to the Faculty Member for review and signoff.	<p>Faculty Pending Signoff (Central)</p> <p>Send to the Faculty Member for review and signoff.</p>
				<p>Initial Review (Central Coordinator)</p> <p>Send back to this step if you are not ready to send to faculty yet (e.g., discussions with leadership ongoing).</p>

SUBMITTING TO THE NEXT STEPS

To send applications to another step:

1. Select applications in the renewal dashboard. They must be at the same **Step**.
2. Click Submit.

The screenshot shows the 'Part-Time Renewals' dashboard. At the top, there are search and filter options. Below that, a table lists applications with columns for Faculty Name, Department, Division, Rank, Primary Location, College ID Type, License Verified, Contribution Hours, Status, Step, Reviewer, Decision, Renewal Term, Faculty Last Login, and Last Updated. A red callout '1' points to the 'Step' column, with the text 'Filter to select applications that are at the same step'. Another red callout '2' points to the 'Submit' button, with the text 'Click here to move selected applications to the next step'.

3. In the screen that comes up, select Step: Decision Review (Central Coordinator), and Reviewer: your name. To send to department leadership for review, select Step: Department Leadership Review, and Reviewer: your Department Leadership will be the only option. If you have more than one option, select the most appropriate option.
4. Click Save.

The screenshot shows the 'Move to Next Step' form. It has a title 'Move to Next Step' and a note 'Fields with * are required.' Below that, there are two dropdown menus: 'Step*' and 'Reviewer*'. A red callout '3' points to the 'Step*' dropdown with the text 'Select Step and Reviewer'. At the bottom, there are three buttons: 'Save', 'Back', and a 'Save' button with a lock icon. A red callout '4' points to the 'Save' button with the text 'Click Save'.

NEED SUPPORT?

Please log a service ticket [here](#). All FHS DB User Guides can be found on the [FHS DB website](#).