

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

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TARGET AUDIENCE: ACADEMIC COORDINATORS

Updated December 13, 2024

## OVERVIEW

This document outlines how the Regional Academic Coordinators will use the **FHS DB Renewal Dashboard** to review and set decisions for faculty at distributed/regional sites, in preparation for sending to faculty for part-time appointment renewals.

For details on the process for Hamilton-based faculty, or if your department is not involved in distributed/regional sites, please see [Renewal Dashboard – Steps to Decision Review \(Central Process\)](#) (see the Renewal Dashboard section).

## ACCESS AND SECURITY

- Department Academic Coordinators will have access to all faculty members in their **department**.
- Regional (Distributed) Academic Coordinators will have access to faculty members based on **teaching location**.
- 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.

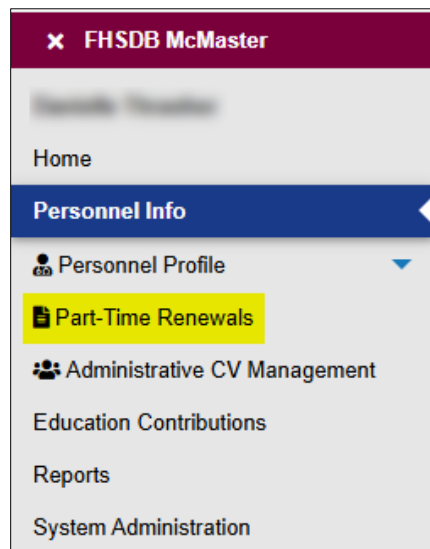
## LOGIN TO FHS DB

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](#).

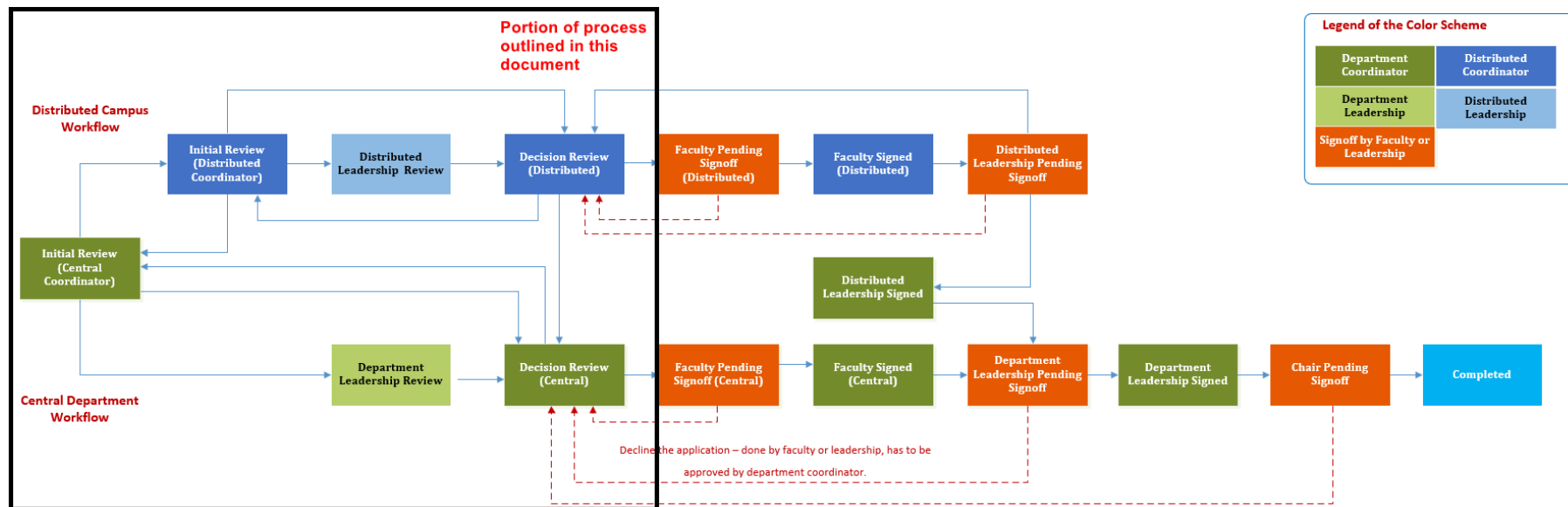
## RENEWAL DASHBOARD

### 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 location’s renewal candidates in the Renewal Dashboard.

**If you notice:**

<b>Anyone that is assigned to you but should be assigned to a Department Academic Coordinator</b>	Submit them to Initial Review (Central Coordinator)
<b>Anyone that is assigned to a Department Academic Coordinator but should be assigned to you</b>	Reach out to the appropriate Department Academic Coordinator so that they can submit to you as Initial Review (Distributed Coordinator)
<b>Anyone is missing from your list entirely</b>	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. To move multiple applications to another step at the same time, all applications must be in the **same Department**.
3. When moving to Decision Review, the applications should have a decision assigned, so you may want to filter by Decision.
4. 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 and then click Search, 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

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

<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"/>	[blurred]	[blurred]	Family Medicine	Division of Family Medicine	Assistant Clinical Professor	Hamilton Region	CPSO	[blurred]	Yes	3027	Pending Department	Decision Review (Central Coordinator)	Thrasher, Danielle	Renew	3	2024-12-10	2024-12-10 10:44am

## MOVING THROUGH THE STEPS

### INITIAL REVIEW (DISTRIBUTED COORDINATOR)

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

Step	Status	Application sits with	Information	Available Next Steps
<b>Initial Review (Distributed Coordinator)</b>	<b>Pending Distributed Site</b>	Regional Academic Coordinator	<p>The Regional Academic Coordinator can review their faculty in this step.</p> <p><b>Things you can do in this step:</b></p> <ul style="list-style-type: none"> <li>-Send faculty back to the Department Academic Coordinator</li> <li>-Complete info verification</li> <li>-Assign decisions</li> <li>-Send to Regional Leadership for review</li> <li>-Send to Decision Review (Distributed).</li> </ul> <p>From that step, you will be able to submit to faculty for sign-off.</p> <p>To submit multiple faculty at once, they must be in the same Department.</p>	<b>Initial Review (Central Coordinator)</b> Send faculty who don't belong to you back to the Department Academic Coordinator.
				<b>Distributed Leadership Review</b> Send to the regional leadership to review within the dashboard (optional)
				<b>Decision Review (Distributed)</b> Send here when application is ready to be sent to faculty for sign-off

### DISTRIBUTED LEADERSHIP REVIEW (OPTIONAL)

This step allows you to send applications to the regional 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
Distributed Leadership Review	Pending Distributed Site	Distributed Leadership (Regional Assistant Deans)	The Distributed Leadership can review within the dashboard when the Distributed Academic Coordinator selects this step and submits to them.	Decision Review (Distributed)



**Please note**, for any applications you submit to Distributed 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 Distributed Leadership sends it back to you.

## DECISION REVIEW (DISTRIBUTED 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
<b>Decision Review (Distributed)</b>	<b>Pending Distributed Site</b>	Regional Academic Coordinator	This step means the application is ready to be sent to the Faculty Member for review and signoff.	<div style="background-color: #e67e22; color: white; padding: 5px; text-align: center; margin-bottom: 10px;"> <b>Faculty Pending Signoff (Distributed)</b> </div> <p>Send to the Faculty Member for review and signoff.</p> <div style="background-color: #2980b9; color: white; padding: 5px; text-align: center; margin-bottom: 10px;"> <b>Initial Review (Distributed Coordinator)</b> </div> <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** and in the same **Department**.
2. Click Submit.

**Part-Time Renewals**

Filters: Last Name, First Name, Renewal Year (Renewal 2025), Department (Family Medicine), Division, Primary Teaching Location, Rank, Decision (Lapse, Renew), Status, Step (Initial Review (Distributed Coordinator)), License Verified, College ID Type.

Buttons: Search, Reset, Export, Submit (circled in red).

Table showing 1 to 25 of 29 entries:

Faculty Name	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
[Redacted]	Family Medicine	Division of Family Medicine	Assistant Clinical Professor (Adjunct)	Waterloo Region	CPSO	[Redacted]	Yes	154	Pending Distributed Site	Initial Review (Distributed Coordinator)	Mychayluk, Leah	Renew	3	2024-01-14	2024-11-22 03:30pm
[Redacted]	Family Medicine	Division of Family Medicine	Assistant Clinical Professor (Adjunct)	Waterloo Region	CPSO	[Redacted]	Yes	242	Pending Distributed Site	Initial Review (Distributed Coordinator)	Mychayluk, Leah	Renew	3	2024-09-11	2024-11-22 03:30pm
[Redacted]	Family Medicine	Division of Family Medicine	Assistant Clinical Professor (Adjunct)	Waterloo Region	CPSO	[Redacted]	Yes	214	Pending Distributed Site	Initial Review (Distributed Coordinator)	Mychayluk, Leah	Renew	3	2024-10-16	2024-11-22 03:30pm

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

**HOME / RENEWAL APPLICATION / SET NEXT STEP**

**Move to Next Step**

Fields with \* are required.

Step\* (circled in blue) **3 Select Step and Reviewer**

Reviewer\*

**4 Click Save** (circled in blue) **Save** (circled in red) **Back**



## NEED SUPPORT?

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