

Please note,
some slides
have comments
you can expand
on the side bar
to read more
narrative.



Appendix II Generator 2nd Year Overview

<https://fsns.ucdmc.ucdavis.edu/>

Academic Personnel



Appendix II Process

	Task
<p>Department "Manage Appendix IIs" Dashboard</p>	<p>Manually enter the basic Appt info into Appendix II form: then salary components will auto-fill & calculate <i>Create multiple App IIs for all salary scenarios</i></p>
<p>Dean's Office</p>	<p>Review salaries in system and approve or reject for edits/resubmission</p>
<p>Department "Review Appendix IIs" Dashboard</p>	<p>Dept Reviewer will select which App II to send out to faculty for acknowledgement, can be done in batch processing. Only one App II version can be in acknowledgement progress at a time</p>
<p>Faculty</p>	<p>Receives email with direct link to view and acknowledge <i>Has access to view their past records</i></p>
<p>Chair</p>	<p>Can batch acknowledge all Appendix IIs and they become "Final"</p>
<p>Academic Personnel</p>	<p>AP enters final Appendix II in UCPATH</p>
<p>Department</p>	<p>As advancement decisions are announced, Dept routes updated App II for UCPATH entry <i>System archives old version as "superseded"</i></p>
<p>System</p>	<p>Final Appendix IIs are archived in the system with transaction history</p>

Dashboards

<https://fsns.ucdmc.ucdavis.edu/>

Must be on the VPN to access the website



Appendix II Generator



MENU

Manage Appendix IIs

Dean's Office/AP

Review Appendix IIs

My Appendix IIs

Sign Appendix IIs

Manage System

CRM

Dashboard Menus

Manage Appendix IIs:

Dept Admin will create/edit App IIs & route for Dean's Office

Dean's Office / AP:

Dean's Office will review/approve, AP will mark when entered in UCPath

Review Appendix IIs:

Dept Reviewer will select which approved App II to route to Faculty

My Appendix IIs:

Faculty Dashboard - to acknowledge App IIs and view history

Sign Appendix IIs:

Chair Dashboard - to complete Dept acknowledgement and finalize

Dashboards, Roles and Workflow

Dashboard: “Manage Appendix IIs”

Role: Dept Administrator

Duties: Create, draft, modify & **ROUTE** all App IIs to the *Dean’s office

Status label: “Draft” not routed

Dashboard: “Dean’s Office/AP”

Role: Dean’s Office Approver

Duties: Reviews all salary info & approves/rejects

Status label: “Dean’s Office Review”

Dashboard: “Review Appendix IIs”

Role: Department Router

Duties: Decide which Dean approved App II to **ROUTE** for Faculty Acknowledgment (1 at a time)

Status label: “Dean Approved”

*Internal Medicine will route to a Division Reviewer before moving to Dean’s Office

Dashboard: “Review Appendix IIs” – Division Review

Role: Division Reviewer

Duties: Review and ROUTE App IIs to Dean’s Office
May reject / send back for corrections if needed

Status Label: “Division Review”

MENU

Manage Appendix IIs

Dean's Office/AP

Review Appendix IIs

My Appendix IIs

Sign Appendix IIs

View Only Roles

Allows individuals to check the status, transaction history and view Appendix IIs. Cannot create, modify or route Appendix IIs.

Chair Acknowledgement

Dashboard: Sign Appendix IIs

Once Faculty acknowledges, it will auto-route for Chair Acknowledgement in the “Sign Appendix IIs” Dashboard for finalizing.

Status label: “Chair Review”

Faculty Acknowledgement

Dashboard: My Appendix IIs

Dept Approver ROUTES a single App II for faculty acknowledgement

Status label: “Faculty Review”

Appendix IIs for Chairpersons will automatically route to the Dean’s Office for finalizing after the Chair acknowledges their own App II.

Manage Appendix II Dashboard

Manage Appendix IIs

Selected Fiscal Year:

2026-27

Selected Fiscal Year:

Will default to the next FY on January 1st in preparation for processing new Appendix IIs for budget season.

You can change the drop down to other FYs if needed.

Refresh Page

Data last refreshed:

03/06/2025 12:57 PM

Display 25

Show/Hide Columns

9 columns selected

Search

Reset Filters

Show Additional Filters

Process Selected

Export to Excel

Name	Department / Division	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Route	Action
Last Name, First Name	Dermatology											<input type="checkbox"/>	+
Last Name, First Name	Dermatology											<input type="checkbox"/>	+

Faculty names will preload from a live UCPath Department Roster

Click the “+” sign to add a new or add’l Appendix II for this faculty member

Creating an Appendix II Form for July 1st

Form Details

Version: 2 of 2 Fiscal Year: 2026-27

*** Salary Effective Date:** 07/01/2026

*** Salary Scale Used:** 10/01/2025 - 09/30/2026

Employee Information

Name: Last Name, First Name Employee ID: 123456789 Active UC Path Title: *As of today* 001732 - HS ASST CLIN PROF-HCOMP Department / Division: Neurology

Appointment Information

* Is this a new appointment? No Yes

* Series 1: HSCP * % Time: 100 * Rank: Assistant * Step: 4.5

Series 2: - Select - % Time: 0

% Total: 100 %

Annual Salary Rate Components

I have been informed by my chairperson that the salary recommended for me this fiscal year is as follows:

* Approved Base Scale (Salary Admin Plan/APU#): 4

* Total Faculty Salary (Base + Negotiated): \$243,764

Salary Effective Date:
Auto populates with 7/1/XX of current fiscal year until Dec 31st, then will auto populate with 7/1/XX of next fiscal year on Jan 1st.

You can also reference the salary scale being pulled.

*For October 1st App IIs, you'll need to type in or use the date picker to change to 10/1/20XX. This determines which salary scale is used.

Appointment Information:
Complete all areas in the yellow circle first.

See next slide for more...

Creating an Appendix II Form (slide 2)

Annual Salary Rate Components

I have been informed by my chairperson that the salary recommended for me this fiscal year is as follows:

*The base scale that has been negotiated is

*Total Faculty Salary (Base + Negotiated):

Faculty Salary Components ↑↓	*Comp Rate Code ↑↓	*100% Annual Value ↑↓	Prorated Value at % Time (if <100) ↑↓
Regular Pay (X)	UCHSX	\$152,100.00	
Increment	UCHD51	\$9,500.00	
Other Off Scale (campus split appts only)	<input type="text" value="N/A"/>	<input type="text" value="\$"/>	
Scale Pay (X')	UCHSP	\$98,900.00	
Total Base Salary		\$260,500.00	
Negotiated Pay Y	<input type="text" value="UCHSN (not firm)"/>	\$139,500.00	
Total Faculty Salary (Base + Negotiated)		\$400,000.00	

Administrative Appointment

Does this faculty member have an Administrative Appointment? No Yes

*Administrative Appointment Type:

*Administrative Appointment Type ↑↓	*Comp Rate Code ↑↓	*Annual Amount ↑↓	Details ↑↓
<input type="text" value="001010 ASSOC DEAN"/>	<input type="text" value="STP"/>	<input type="text" value="\$6,000"/>	<input type="text"/>

Total Annual Salary (Faculty + Administrative):

Select the **Scale (0-9)** and enter the **Total Faculty Salary (X+X'+Y)**

This information, along with the Appt information entered above, will calculate and auto-populate the salary information.

If <100%, prorated values will also populate.

Administrative Appt:

If there is salary associated with administrative appointments, you can add here to see a Total Annual Salary (Faculty +Admin)

Creating an Appendix II Form (Slide 3)-

Other areas on the Appendix II entry

Administrative Appointment

Does this faculty member have an Administrative Appointment? No Yes

VA Appointment

Does this faculty member have a VA Appointment? No Yes

*VA Fraction (8ths):

*VA Salary:

Note

This Appendix II is for a potential 1.5-step plus merit to Step 4, eff. 7/1/2026

500 characters remaining


Administrative Appointment:

If there is no Admin Appt, leave as “no”

VA Appointment:

If there is VA Appt with Salary information, enter it here. It **does not** get calculated into the UCDH Appendix II Total Faculty Salary, it is for reference only.

Notes:

Notes entered on the Appendix II form will be saved on the Dashboards  icon, also viewable on the export to excel.

- Good to use if creating multiple versions per faculty when there is a pending action.
- The notes **do not** save on the Appendix II view if you open it to edit later.

“**Save Edits**” will save but leave you on the screen
“**Save Edits & Return...**” will save and return to your Dashboard

“**Cancel**” will leave the page without saving

Form Details

Version: 1 of 1 Fiscal Year: 2026-27 Salary Effective Date: 07/01/2026 Salary Scale: 10/01/2025 - 09/30/2026

Employee Information

Name: [Redacted] Employee ID: [Redacted] Department / Division: [Redacted]

Appointment Information

Is this a new appointment? No
Series 1: HSCP % Time: 80 Rank: Assistant Step: 3
Series 2: % Time: 0
% Total: 80

Annual Salary Rate Components

I have been informed by my chairperson that the salary recommended for me this fiscal year is as follows:
Approved Base Scale (Salary Admin Plan/APU#): 6
Total Faculty Salary (Base + Negotiated): 478,450

Faculty Salary Components	Comp Rate Code	100% Annual Value	Prorated Value at % Time
Regular Pay	UCHSX	\$103,800.00	\$83,040.00
Increment	N/A		
Other Off Scale (campus split appts only)	N/A		
Scale Pay (X')	UCHSP	\$67,500.00	\$54,000.00
Total Base Salary		\$171,300.00	\$137,040.00
Negotiated Pay Y	UCHSN (not firm)	\$307,150.00	\$245,720.00
Total Faculty Salary (Base + Negotiated)		\$478,450.00	\$382,760.00

Appendix II PDF - Draft

Draft PDF highlights the areas that were entered or auto-populated.

I understand this salary is expressed as an annual rate and that it will be prorated if it is effective for a partial year, a reduced percentage of time due to leave status, or a reduced appointment.

If a change in the base scale is mandated by the University, I understand that the total base salary (X + X') will be modified automatically. Additional negotiated compensation (Y) will be decreased accordingly if available, result in no change to overall salary.







I understand that the receipt of this salary is governed by the Health Sciences Compensation Plan, University of California, Davis, Implementation Procedures and that I may file a grievance regarding the salary under the grievance measures outlined in Section V.C. of those Procedures.

This statement represents a record of my salary negotiations with my department chair. I understand that it is not a contract. (Section VII.D.1. of the Implementation Procedures). Finally, I understand that this salary is subject to approval of the Vice Provost – Academic Planning and Personnel upon recommendation of the Department Chair and the Dean.

Manage Appendix II Dashboard

-Action Icon Legend

Show/Hide Columns: 9 columns selected | Search: | Reset Filters | Show Additional Filters | Process Selected | Export to Excel

Name ↑	Department / Division ↑↓	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Route	Action
Last Name, First Name	Dermatology											<input type="checkbox"/>	+
		1 of 1	07/01/2026	6	Clinical X		Assistant	3	\$350,000	Draft / Not Routed		<input type="checkbox"/>	     



Preview Appendix II	Edit Appendix II	View Transaction History	View Notes	Retract	Delete Appendix II
View as PDF, can save a copy	Make changes before routing or after it's sent back for edits from the Dean	Tracks the who, what, when	Notes entered on Appendix II are saved here, not on the App II form	Retract any routed Appendix II prior to "final" and returns to your dashboard level as "retracted"	Delete Draft Appendix IIs

Manage Appendix II Dashboard

“Draft / Not Routed” Appendix IIs

Once you’ve entered your Appendix IIs, you should verify accuracy with the export to excel feature (you must display “all” and show all filters).

You can route Drafts (or “retracted”, “Dean Rejected”) App IIs to the *Dean’s Office for review & approval (they may send back for edits)

**Note: Internal Medicine App IIs will first route to Division Reviewer, who will route to Dean’s Office or reject back to you for edits (“division rejected”)*

Process Selected:

To batch process, check all you’d like to route and then click “Process Selected”

Display All ▾

Process Selected

Export to Excel

Name ↑	Department / Division ↑↓	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Route	Action
Last Name, First Name	Medical Microbiology and Immunology											<input type="checkbox"/>	+
		1 of 2	07/01/2026	6	Regular Ladder Rank	Full	2.5	\$400,000	Draft / Not Routed	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	     
		2 of 2	07/01/2026	6	Regular Ladder Rank	Full	3	\$450,000	Draft / Not Routed	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	     
Last Name, First Name	Medical Microbiology and Immunology											<input type="checkbox"/>	+
		1 of 1	07/01/2026	6	Clinical X	Assistant	3	\$300,000	Draft / Not Routed	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	     



Dean's Office Review

- Dean's Office will review all Appendix IIs
 - The Dashboard status will be "Dean's Office Review"
- If edits need to be made, they will add a note and reject the App II. It will move back to the Manage Appendix II Dashboard for edits and resubmission.
 - The Dept Admin will receive an email notification that the Appendix II has been returned for correction and will show on their Dashboard as "Dean Rejected"
- If approved, the App II moves to the Review Appendix II Dashboard; ready for the Department Reviewer/Router to choose an App II to send for faculty acknowledgment

Review Appendix IIs Dashboard

This is where the “Dean Approved” Appendix IIs stay until one is ready to route to faculty

After Dean’s Office approval, Appendix IIs move to this Dashboard with a status of “Dean Approved”

The role of Department Router will choose which single Appendix II to send for Faculty & Chair Acknowledgments

- Only **ONE** Appendix II can go through the final process at a time until “FINAL”
- Once an Appendix II is finalized, if a new App II is required, the dept admin will choose to route an updated Appendix II
 - Once finalized, the new App II will supersede the last App II (which can be archived)
- If Faculty has pending action, AP recommends waiting to send for faculty acknowledgment until June to try to capture as many final advancement decisions as possible

Name ↑	Department / Division ↑↓	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Route	Archive	Action
Last Name, First Name	Medical Microbiology and Immunology													
		2 of 5	07/01/2026	6	Clinical X		Full	4	\$310,000	Dean Approved		<input type="checkbox"/>	<input type="checkbox"/>	
												<input type="checkbox"/>	<input type="checkbox"/>	

You can manually Archive outdated Appendix IIs from this dashboard

(recommend doing this in August after July payroll computes)

Example:

Create App IIs for no merit, and all step options for merit-

- Process & *finalize* the non-merit App II if no merit decision yet
- Merit decision approved as 1.5-step: process & finalize the 1.5-step merit App II to supersede the other. You can archive the 1-step and 2-step merit App IIs

My Appendix IIs Dashboard

Faculty Acknowledgement

My Appendix IIs



Refresh Page

Data last refreshed:
02/12/2025 08:24 AM

Show Additional Filters:

When faculty log in, they will, by default, see the Appendix II that **needs acknowledgment**, or Appendix IIs that were already **finalized**. They may also add additional filters – e.g. Other Appendix IIs approved by the Dean with a status of “Dept Review”.

Display 25

Show/Hide Columns

Search

10 columns selected

Reset Filters

Show Additional Filters

Salary Effective Date ↑	Department / Division ↑↓	Fiscal Year	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Action
07/01/2026	Dermatology	2026-27	0	Adjunct		Assistant	1	\$111,111	Faculty Review		  

From: HS-WEB-NoReply@ucdavis.edu <HS-WEB-NoReply@ucdavis.edu>
Sent: Thursday, February 13, 2025 8:27 AM
To: Junjie Jiang <jjiang@ucdavis.edu>
Subject: An Appendix II is Ready for Your Review and Acknowledgement

Email Notification:

Once Dept routes App II, Faculty will receive an email notification with link to the page they need to review and acknowledge


You have a new Appendix II to review and Acknowledge.

To review and acknowledge this Appendix IIs visit the Faculty Salary Negotiation System application. Click on the link for My Appendix IIs. Appendix IIs needing review will have a status of Faculty Review.

Note: If you are offsite you must be on VPN and logged in with Kerberos in order to access the Faculty Salary Negotiation System application. If you are onsite you must be using a computer that is connected to the network or be using the production Wi-Fi.

[Faculty Salary Negotiation System](#)

Faculty Actions:

Faculty **must “View”** their Appendix II PDF before the  will activate to be able to acknowledge.

They can also view transaction history

My Appendix IIs Dashboard

Faculty “Acknowledge Appendix II” Pop-Up

Manage Appendix IIs | Dean's Office/AP | Review Appendix IIs | **My Appendix IIs** | Sign Appendix IIs

My Appendix IIs



Refresh Page

Data last refreshed:
02/12/2025 08:24 AM

Show/Hide Columns

10 columns selected

Search

Salary Effective Date ↑

07/01/2026

Department

Dermatolog

Acknowledge Appendix II

* Required field
Submit button will enable when the required checkbox is complete.

Series 1	% Time	Rank	Step
Adjunct	100	Assistant	3.5
Series 2	% Time		
	% Total		
	100		

Total Annual Salary 100% Time: \$200,000.00

- “I acknowledge and agree with the above salary” [comments optional]
- “I acknowledge, but disagree with the above salary (please explain)” [require comments]

Comments:

0 / 250

Display 25

Total Annual Salary

Status

Entered in UC Path

Action

\$111,111

Faculty Review



When they click the ✓:

This Pop-up box will appear and show the basic information. They must select one option and click submit.

Comments: not required if “agree”; required if “disagree”. Comments save in Transaction History, **not** on the Appendix II form PDF.

Acknowledgement Override Function

Review Appendix II Dashboard (Dept Router)

Name ↑	Department / Division ↑↓	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Route	Archive	Action
Last Name, First Name	Medical Microbiology and Immunology													
		2 of 5	07/01/2026	6	Clinical X		Full	4	\$310,000	Faculty Review		<input type="checkbox"/>	<input type="checkbox"/>	
					HSCP		Full	7.5	\$300,000	Department Review		<input type="checkbox"/>	<input type="checkbox"/>	

Acknowledgement Override

* Required field
Submit button will enable when all required fields are complete.

Faculty:

Department / Division: Medical Microbiology and Immunology

*Route to Override:

Nicole, Steele

*Acknowledgement Override Reason:
 - Select -
 - Select -
 Faculty chose not to sign
 Faculty did not respond
 Faculty unavailable

Route

Acknowledgement Override:

If faculty member is unavailable or unwilling to acknowledge their Appendix II after it's been routed to them, there is a Dept override function.

- Dept Admin will click the override button *(only available once it's at Faculty Review Level)*
- Add a team member to route to for acknowledgement override function
 - Can be anyone except the Chair – they don't need system access – see email below
- Select the reason
- Route

From: HS-WEB-NoReply@ucdavis.edu <HS-WEB-NoReply@ucdavis.edu>
Sent: Monday, March 10, 2025 3:44 PM
To: Abigail J Reyes <ajreyes@ucdavis.edu>; Nicole M Steele <nmsteele@ucdavis.edu>
Subject: An Appendix II for : requires an Acknowledgement Override

An Appendix II for for the fiscal year 2025-26 requires

Reason for Acknowledgement Override: Faculty did not respond

Please visit the Faculty Salary Negotiation System at the link below. Click noted above. The status of the Appendix II awaiting your action is: Acknow whoever takes action first will update the status of this Appendix II to Department Override and it will route to the Dean or Chair for signature.

Note: If you are offsite you must be on VPN and logged in with Kerberos in order to access the Faculty Salary Negotiation System application. If you are onsite you must be using a computer that is connected to the network or be using the production Wi-Fi.

[Faculty Salary Negotiation System](#)

Email Notification:
 will receive an email notification with link to complete the Dept override, then the App II will route to the Chair

Sign Appendix IIs Dashboard

Chair Acknowledgment (or Dean for Chairs)

Name ↑	Department / Division ↑↓	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Sign <input checked="" type="checkbox"/>	Action
Last Name, First Name	Dermatology											
		3 of 5	07/01/2026	3	HSCP		Full	7.5	\$300,000	Faculty Acknowledged or Department Acknowledged	<input checked="" type="checkbox"/>	  

Chair will need to acknowledge Appendix IIs in the “Sign Appendix II Dashboard” to Finalize

- Statuses will be – Faculty Acknowledged or Department Acknowledged when ready for Chair sign off
- Chair will receive a weekly email summary notification of all Appendix IIs awaiting their acknowledgement
- Chair can batch acknowledge all items in the queue
- The Appendix IIs become “Final” after this step

Chair’s own Appendix IIs will automatically route to the Dean for final acknowledgment

Process Selected

Final Department Dashboard Views

Show/Hide Columns: 9 columns selected

Search: []

Reset Filters Show Additional Filters

Process Selected Export to Excel

Name ↑	Department / Division ↓	Appendix II Version	Salary Effective Date	Scale	Series 1	Series 2	Rank	Step	Total Annual Salary	Status	Entered in UC Path	Route	Archive	Action
Dermatology														
		1 of 5	07/01/2026	6	Regular Ladder Rank		Full	6.5	\$334,012	Superseded		<input type="checkbox"/>	<input type="checkbox"/>	
		2 of 5	07/01/2026	6	Clinical X		Full	4	\$310,000	Department Review		<input type="checkbox"/>	<input type="checkbox"/>	
		5 of 5	07/01/2026	4	Adjunct	Clinical X	Full	1	\$210,000	Final	✓	<input type="checkbox"/>	<input type="checkbox"/>	

Departments can monitor all Appendix II statuses with the show additional filters function

Executed & Complete Appendix II statuses are:

- **Final** – you will also see a ✓ when AP has entered the Salary info into UCPath
- **Superseded** – archived if a revised version is now final

If status is “**Department Review**”, those App IIs are approved by Dean’s Office and waiting to be routed or archived if not needed.

Dept can view the final executed Appendix IIs as PDFs or export filtered data to excel

Appendix II PDF - FINAL



UC Davis Health
2315 Stockton Blvd.
Sacramento, CA 95817
health.ucdavis.edu

FINAL

Form Details

Version: 3 of 5 Fiscal Year: 2026 Salary Effective Date 07/01/2026 Salary Scale: 10/01/2025 – 9/30/2026 -27

Employee Information

Name: Shacklett, Barbara Employee ID: 10220297 Current Title: 001721 - PROF-HCOMP Department / Division: Medical Microbiology and Immunology

Appointment Information

Series 1: HSCP % Time: 100 Rank: Full Step: 7.5
Series 2: % Time:
% Total: 100

Annual Salary Rate Components

I have been informed by my chairperson that the salary recommended for me this fiscal year is as follows:

The base scale that has been negotiated is 3
Total Faculty Salary (Base + Negotiated): 300,000

Faculty Salary Components	Comp Rate Code	100% Annual Value	Prorated Value at % Time
Regular Pay	UCHSX	\$203,500.00	
Increment	UCHD51	\$10,600.00	
Other Off Scale (campus split appts only)	N/A		
Scale Pay (X')	UCHSP	\$61,100.00	
Total Base Salary		\$275,200.00	
Negotiated Pay Y	UCHSN (not firm)	\$24,800.00	
Total Faculty Salary (Base + Negotiated)		\$300,000.00	

Administrative Appointment

Does this faculty member have an Administrative Appointment? No

VA Appointment

Does this faculty member have a VA Appointment? No

Page 1 of 2

I understand this salary is expressed as an annual rate and that it will be prorated if it is effective for a partial year, a reduced percentage of time due to leave status, or a reduced appointment.

If a change in the base scale is mandated by the University, I understand that the total base salary (X + X') will be modified automatically. Additional negotiated compensation (Y) will be decreased accordingly if available, result in no change to overall salary.

I understand that the receipt of this salary is governed by the Health Sciences Compensation Plan, University of California, Davis, Implementation Procedures and that I may file a grievance regarding the salary under the grievance measures outlined in Section V.C. of those Procedures.

This statement represents a record of my salary negotiations with my department chair. I understand that it is not a contract. (Section VII.D.1. of the Implementation Procedures). Finally, I understand that this salary is subject to approval of the Vice Provost – Academic Planning and Personnel upon recommendation of the Department Chair and the Dean.

Acknowledgement

Acknowledgement Override:
03/10/2025, 03:43 PM
Override Reason:
Faculty did not respond

Signature

Signed By: Nichol Runner,
MED:ACADEMIC PERSONNEL
Date/Time: 03/12/2025, 04:13 PM

Finalized

Finalized on: 03/12/2025, 04:13 PM

Faculty or Dept Chair

Transaction History

Transaction History				Display	10
Status	Updated By	Updated Date/Time	Comments		
Department Acknowledged	CAO	03/10/2025, 03:47 PM			
Acknowledgement Override	Dept Router	03/10/2025, 03:43 PM	Reason for Acknowledgement Override: Faculty did not respond		
Faculty Review	Dept Router	03/10/2025, 03:40 PM			
Department Review	Dean (Approved)	02/04/2025, 10:12 AM			
Dean's Office Review	Dept Admin (either Creator or Division)	02/04/2025, 10:03 AM			
Draft / Not Routed	Dept Admin [creator]	01/31/2025, 02:12 PM			

Showing 1 to 6 of 6 entries << < 1 > >>

Multiple Appendix II Process

- When faculty have pending advancement decisions
 - Departments will create Appendix IIs for each salary scenario to be approved all at once by Dean
 - After creating one Appendix II, when you click the “+” again, it duplicates the last one, so you only have to modify rank/step and total faculty salary to generate for most scenarios
 - Past practice: salary spreadsheets should have included multiple rows for each potential salary negotiation
- All versions will route to the Dean’s office for review
 - Past practice: multiple iterations of salary spreadsheets may have been sent between Dept and Dean’s Office, if Depts did not include the requested rows with all salary scenarios.
- The Dean’s Office will review all possible salary scenarios
 - Approved Appendix IIs will then move to the “Review Appendix IIs” Dashboard; ready for the Department Router to choose an Appendix II to send forward for faculty acknowledgment

Tracking and Reporting

You will be able to filter statuses and search faculty names on each Dashboard

- You can set your dashboard view to show/hide columns. This setting does not save for future log-ins
- Filters default to only show your role's action items; however, you can edit filters to show/hide other statuses
- Reporting: "Export to Excel"
 - Set your Additional Filters to select statuses you want to see – (usually view all) then "Export to Excel" to create a custom report showing all Appendix II data for those selections

The screenshot displays a dashboard interface with several key components:

- Show/Hide Columns:** A dropdown menu showing "9 columns selected" with a list of columns: Name, Appendix II Version, Salary Effective Date, Scale, Series 1, Series 2, and Rank. All are checked.
- Search:** A search bar labeled "Faculty Name search" with a "Reset Filters" button.
- Additional Filters:** A dark blue panel with a close button (X) and a "Show Additional Filters" button.
- Department / Division:** A dropdown menu set to "Anesthesiology and Pain Medicine".
- Status:** A dropdown menu showing "14 items selected" with a list of statuses: Archived, Dean Approved, Dean's Office Rejected, Dean's Office Review, Department Acknowledged, Dept Override Pending, Division Rejected, Division Review, Draft / Not Routed, Faculty Acknowledged, Faculty Review, Final, Retracted, and Superseded / Voided. All are checked.
- Table:** A table with columns: Name, Department / Division, Scale, and Series 1.

Yellow callout boxes highlight the "Show/Hide Columns" menu, the "Additional Filters" panel, and the "Status" list. A yellow box around the status list contains the text: "These are all of the possible statuses".

FAQs

Can someone be both a Dept Admin (creator) & Dept Router?

Can multiple people be in each role?

Yes, for some depts, the two roles may end up being the same person.

It is a good idea to have 2+ people in each Dept role to back up duties.

How do I provide additional information like we did on Salary Spreadsheets?

The online Appendix II form has an area to add comments that will also export to excel.

(Example: this version if for a 1-step merit. This version is for 1.5-step merit)

What if I notice a mistake after it's been routed or approved by Dean's Office?

You can retract an Appendix II after it's been routed anywhere, as long as it's before "Final"

It will return to whichever Dashboard processed the "retract"

What if a faculty member is unavailable or refuses to complete the App II process?

There is a Dept acknowledgement override process. More details are outlined in an earlier slide.

Can Faculty see all pending Appendix IIs, or only the one routed to them?

They will only be able to see/filter Appendix IIs that were already routed to them to avoid seeing versions that are in progress.

By default, faculty see the Appendix II that needs action at the top, then any other previously finalized (or superseded).

How do we process App IIs for Faculty with split appts in two depts?

Each department should process an Appendix II for their portion (%) of a paid appointment.

The Faculty will get two Appendix IIs to acknowledge on their Dashboard—the Dept name will be on each.

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Questions?