

How to Generate, Save, and Send an Appointment Form

Appointment forms can be generated and either sent directly to faculty members or saved and released to faculty members via the **Forms and Letters** component of the Faculty Information System. This document will guide you through the appointment form generation process.

Process to Generate Appointment Forms:

1. Update/add salary information
2. Add and select appointment remarks (if applicable)
3. Update administrative appointment (if applicable)
4. Compose Email (required to send and release an appointment form)
5. Generate appointment form (print, send, save)

Step 1: Update/Add Salary Information

1. Select the **Salary** tab of the faculty record.
2. If salary information needs to be added, click **[+ Add New Record]**.
 - a. If the salary information needs to be edited, click **[Edit]**.
3. Enter the information in the pop-up window.
4. Click **[Save]**.

Note: Salary information may already be populated from the salary recommendation process.

Step 2: Add and Select Appointment Remark (if applicable)

1. Select **Forms and Letters** **Forms** **Appointment Remarks Catalog**.
2. Click [\[+Add new record\]](#) to add a new remark.
3. Add a recognizable name and code to the **Name** and **Code** columns in the open fields.
4. Add the content of the remark to the Language open field
 - a. Type directly in the open field or paste unformatted content
 - b. Format font using the toolbar
 - c. Use the #InsertHTML# drop-down menu to insert the #hashtags# into the content to autofill data for personalization
5. Click [\[Update\]](#) to add the content to the catalog.

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- Once the appointment remark has been added/edited in the **Appointment Remarks Catalog**, open the existing faculty record and select the **Appointment** tab.
- Under the **Next Academic Year** column, use the drop-down menu to select the correct Appointment Remark.
- Click **[Submit]** to save.

Step 3: Update Administrative Appointment (if applicable)

- Select the **Administration** tab of the faculty record.
- Add the information in the open fields.

3. Be sure to check “Is Primary” if the administrative appointment should appear on the appointment form.
4. Click [\[Add\]](#).

ACADEMIC UNIT	LOCATION	ADMINISTRATIVE TITLE	START DATE	END DATE	SIGNATURE	IS PRIMARY	LAST UPDATE	ACTION
(ACCT) ACCOUNTANCY	WS...	DEPARTMENT CHAIR	7/1/2021	month/day/...	Diana Berry, MD	☒		ADD

Step 4: Compose Email (to send form through FIS)

1. Select **Forms and Letters** **Forms** **Compose Email** from the navigation menu.
2. From the drop-down menus, select the **School; Academic Unit, Location** and **Division** are optional.
3. Select “Add New Email” from the **Email** drop-down menu.
4. Assign a memorable **Title** to the email (this is what you will select from the Generate Appointment Form drop-down menu)
5. Add an email **Subject**.
6. Add any additional recipients’ email addresses in the **CC List**, separated by a comma.
7. In the **Body** open field, add the contents of your letter.
 - a. Format the letter using the toolbar above the open field.
 - b. Utilize the Insert HTML drop-down menu to insert #hashtags#. These will autofill data from FIS, so the letter can be reused on multiple occasions.
8. Click [\[Save New Email\]](#) when finished.
9. To edit the email, make changes in the Body open field and click [\[Update Existing Email\]](#).
10. To delete the email, click [\[Delete Selected Email\]](#).

The screenshot shows the 'Email Text' form interface. At the top, there's a 'Show Menu' button. Below it, the form is divided into several sections. The first section contains four dropdown menus: 'School' (with 'SOM' selected), 'Academic Unit' (with 'Select' selected), 'Location' (with 'Select' selected), and 'Division' (with 'Select' selected). The second section has a 'Use For' dropdown (set to 'Appointment Forms') and an 'Email' dropdown (set to 'Add New Email'). Below these are three input fields: 'Title', 'Subject', and 'CC List (Comma separated)'. A rich text editor toolbar is positioned above the 'Body' text area, featuring various formatting options like bold, italic, underline, and text color. At the bottom left of the form is a 'Save New Email' button.

Step 5: Generate Appointment Form

1. Select **Forms and Letters** → **Forms** → **Generate Forms** from the navigation menu.
2. Select the appropriate filters from the top row; you may select all.
3. Choose the correct **Academic Year** and **School** from the drop-down menus.
 - a. If “Next Academic Year” is checked, the form will generate data from the year after the year selected in the **Academic Year** drop-down.
4. Provide the following dates for the letter, if necessary: **Dean Print Date, Response Date, Term Start Date, Term End Date**.
5. Optional: Choose the **Academic Organization, Academic Unit**, and **Location** of the recipient from the drop-down menu.
6. Select the faculty member that is receiving the appointment form; you may also select an entire unit.
7. Click [\[Generate\]](#).
8. If you are NOT emailing or releasing the appointment form, either print the form or download as a TIFF, Web Archive, PDF, or XPS document.

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The screenshot shows the top section of the Faculty Information System form. At the top, there are radio buttons for 'Regular' (selected), 'Emeritus', and 'Next Academic Year'. Below these are checkboxes for 'Full-Time', 'Part-Time', 'Half-Time', 'Primary', 'Secondary', 'Visiting', and 'Test Mode'. The 'Academic Year' is set to '2023-2024' and the 'School' is 'SOM'. The 'Email To Send' dropdown is set to 'Chair'. The 'Generate' button is highlighted with a red box. Other buttons visible are 'Save Document' and 'Send Email (TEST)'.

- To send the appointment form via email, select an email using the Email to Send dropdown and click the **[Send Email]** button; be sure that the Test Mode button at the top is not selected

The screenshot shows the 'Email To Send' dropdown menu open, displaying a list of email options including 'Default Appt Forms Email', 'Text - Bella', '2020-21-SOM-Appointment Form', '2020-21 Appointment Form', 'Unnamed Email', and 'TEST EMAIL'. The 'Test Mode' button at the top right is highlighted with a red box. The 'Generate' button is also visible.

- To save the appointment form so that it can be released to the faculty member to view or digitally sign, click the **[Save Document]** button.

The screenshot shows the bottom section of the Faculty Information System form. The 'Save Document' button is highlighted with a red box. Other buttons visible are 'Generate' and 'Send Email (TEST)'.

- To release the form to the faculty member, please see the guide for [How to Release an Appointment Form or Letter](#).