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.

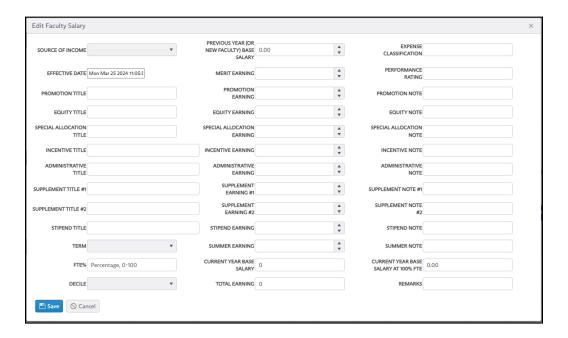
Process to Generate Appointment Forms:

- 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

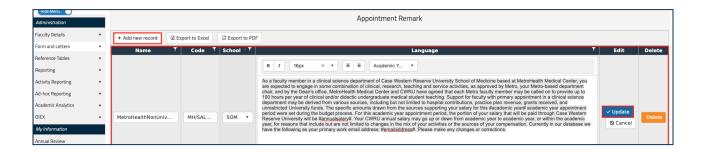
- 1. Select the **Salary** tab of the faculty record.
- 2. If salary information needs to be added, click [+ Add New Record].
 - a. If the salary information needs to be edited, click [Edit].
- 3. Enter the information in the pop-up window.
- 4. Click [Save].

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

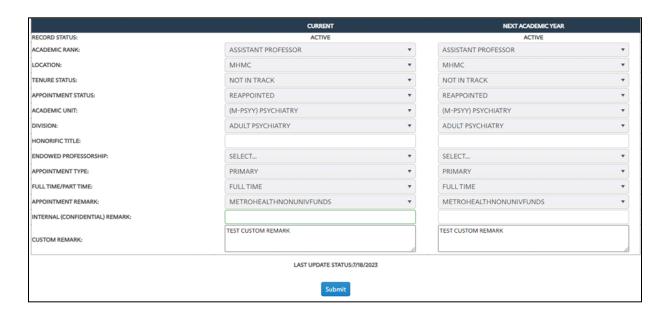


Step 2: Add and Select Appointment Remark (if applicable)

- 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
- Click [Update] to add the content to the catalog.



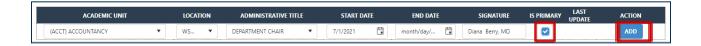
- 6. Once the appointment remark has been added/edited in the **Appointment Remarks Catalog**, open the existing faculty record and select the **Appointment** tab.
- 7. Under the **Next Academic Year** column, use the drop-down menu to select the correct Appointment Remark.
- 8. Click [Submit] to save.



Step 3: Update Administrative Appointment (if applicable)

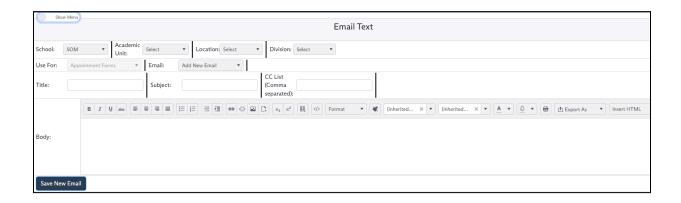
- 1. Select the **Administration** tab of the faculty record.
- 2. Add the information in the open fields.

- 3. Be sure to check "Is Primary" if the administrative appointment should appear on the appointment form.
- 4. Click [Add].



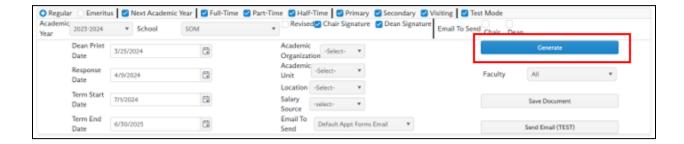
Step 4: Compose Email (to send form through FIS)

- 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.
- 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].

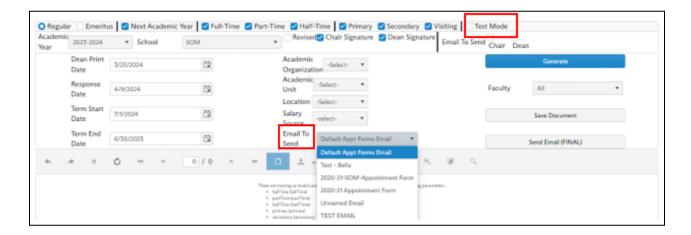


Step 5: Generate Appointment Form

- 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.



9. 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 <u>not</u> selected



10. 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.



11. To release the form to the faculty member, please see the guide for <u>How to Release</u> an Appointment Form or Letter.