

UCI Office of Academic Personnel

# SCHOLARSTEPS CANDIDATE USER GUIDE

LAST UPDATED JUNE 15, 2023

## I. LOGGING INTO SCHOLARSTEPS

You must have an active appointment and UCINETID and password to access ScholarSteps.

- 1. You can access ScholarSteps at: https://scholarsteps.ap.uci.edu/ .
- 2. You will be taken to the UCI Shibboleth Login to enter your credentials.

	UCI University of California, Irvine
	Login with your UCInetID
	The resource you requested requires you to re-authenticate. You may also log out and log back in as another user.
	– UCInetID Example: ptanteater
	Password
F	orgot your password?
	Login
	Activate my UCInetID • Need help logging in? View recent account activity

3. The dashboard will appear once you login. The dashboard will display any pending review files you have access to. This may be your own file and file(s) you have access to as a committee member/voting faculty. Your completed review files can be found by clicking the "Reviews" option on the lefthand side.

🚯 Dashboard	🏘 Dashboard	
පු Profiles	You are now proxied as Candidate Gold 2.	
🗹 Reviews		
	Pending Reviews	Recently Updated Reviews
@ Help	Candidate Gold 2 - Merit - 07/01/2023 Awaiting candidate certification	Candidate Gold 2 - Merit - 07/01/2023 Await
🖸 Contact Us		

# II. UPLOADING DOCUMENTS

1. During file preparation, there are two ways to access the page to upload documents: click the "Documents Tab" or click "Upload all required documents" under the Preparation steps box on the "Details" tab.

Review: Candid Details Documents I	date Gold 2 - Merit - 07/01/2023	
Details		Preparation steps
Name	Candidate Gold 2 - Merit - 07/01/2023	O Upload all required documents
Action	Merit; Dean Delegated	Notify candidate to sign certification
Effective date	07/01/2023	I I I I I I I I I I I I I I I I I I I
State	Document preparation	O Candidate signs certification
Profile	Candidate Gold 2	

2. Once clicked, the "Documents" tab will appear and candidates have the option to upload any documents for the review, aside from solicited external letters.

Review: Candidate Gold 2 - Merit - 07/01/2023	
You are now proxied as Candidate Gold 2.	
Details Documents	
Document	Actions
Review summary <b>0</b>	
Detailed review summary <b>0</b>	
Referee ID list, including sample solicitation letter <b>0</b>	
Addendum or review profile	Upload
* Curriculum vitae	Upload
Research and creative activity statement	Upload
Service activity statement	Upload
Inclusive excellence activities statement	Upload

- i. A pop-up box will appear. Select "Choose File" and a window will open to select and upload PDF documents.
  - Note: You cannot upload multiple files at once. Documents will need to be uploaded one and a time in the order that you would like them to appear in the bundle.

Upload Curriculum vitae	×
Choose File No file chosen	
	Cancel Upload

U	Ipload Curriculur	n١	/itae					×
(	Choose File No file chos	en						
_	🚱 Open						>	×
	$\leftrightarrow \rightarrow \cdot \uparrow$	Tr	aining	> Test Docs 🗸 👌	Q	Search Test Docs		
	Organize 👻 New 🕯	fold	er				•	)
	AP Files	^	Na	me		Date modified	Ту	^
	📃 Desktop		æ	ChairLetter		7/7/2022 8:25 AM	A	
	付 Documents		æ	Committee Report-Confidential		5/18/2022 4:34 PM	A A	
	Downloads		Committee Report-NonConfidential			5/18/2022 4:33 PM	I Ai	
	Music		æ	CV		5/18/2022 4:18 PM	A	
			æ	DeanCommittee Report		5/18/2022 4:27 PM	í Ai	•
			A	DeanFinalAction		5/18/2022 4:31 PM	í Ai	•
	videos		æ	DeanRecommendationLetter		5/18/2022 4:30 PM	A A	•
	Windows (C:)	۷	<	$\sim$			>	
	F	ile n	ame: [	cv	All F	iles	~	1
			L			Open 🖡 🤇	Cancel	

ii. Once the desired file is selected, click "Upload."

Upload Curriculum vitae	×
Choose File CV.pdf	
	Cancel Upload

iii. After each document is uploaded, the "Documents" screen will display a link to the PDF below each document type. You can click the link to see the individual file, or you can hover over the link to view the date/time the document was uploaded, the name of the person who uploaded, and the file size.



## III. CERTIFYING YOUR REVIEW FILE AND UPLOADING A RESPONSE

Note: It is strongly recommended that candidates inspect the file contents during the file preparation stage <u>before</u> they are asked to certify the file.

#### CERTIFYING FOR DEPARTMENAL REVIEW

1. When the department has determined that the review file is complete and is ready for departmental review by the Voting Faculty and Department Chair, the department notifies the Candidate to inspect the file and sign the Certification of Departmental Review. The following is the email notification sent:

UCI ScholarSteps Hi Faculty Flavius,
Your Merit file is ready for department review.
Message from Department Analyst Augusta:
message
Please review all non-confidential documents in your academic review file and certify Review & Certify
You'll have the option to upload a written statement in response to materials in your academic review file when completing this certification. This statement will be made available to departmental reviewers prior to determination of the department recommendation.
This message is generated by <u>ScholarSteps</u> , UCI's online academic personnel system.

Clicking the "Review & Certify" button will direct you to the review file.

2. Once directed to the review file, the following note box is displayed on the review file homepage.

< Review	: Candidate Gold 2 - Merit - 07/0	1/2023
	Your review and certification is requested	
	<ol> <li>Inspect Candidate PDF to ensure condition</li> <li>Certify that the documentation is read</li> </ol>	mpleteness and accuracy dy for department review
Details Doo	uments	
Details		Preparation steps
Name	Candidate Gold 2 - Merit -	All required documents have been upl

Step 1 has a link to Inspect the Candidate PDF. Candidate PDF can also be found by clicking the "Documents" tab.

3. Once the file has been inspected, Step 2 provides a link to certify the file. Once clicked, a pop-up message appears with the option to upload a response and certify.

certification of Department Neview	×
l certify that:	
<ol> <li>I was informed of the impending academic review for this pers University of California policies and procedures related to the</li> </ol>	sonnel action and of the relevant academic review process.
<ol> <li>I was provided opportunity to ask questions, to supply informa review, to make any desired additions, to suggest names for e to provide, in writing, names of persons who, for reasons set f evaluations.</li> </ol>	ation and evidence to be used in the external referee letters (if required), and forth by me, may not provide objective
3. I had the opportunity to inspect all non-confidential materials	in my academic review file.
<ol> <li>I understand I may submit a written statement for inclusion in upon material in the file.</li> </ol>	this file in response to or commenting
Note: Your acceptance on this certification indicates only that you as University policy were followed prior to departmental consideration agreement or disagreement with any of the assessments or opinion have questions, contact your department's academic personnel rep	cknowledge the procedures required by n of your file. It does not imply your ns in the academic review file. If you resentative before accepting.
□ Iaccept Step 1	Sten 3
Optional: upload your response Choose File No file chosen Step 2 (opti	ional)

**IMPORTANT!** If a correction is needed on the file: Certify the file, then the department staff can return the file to the preparation stage by requesting corrections. The candidate or department staff can then upload or replace a file. The file will need to be re-certified.

### **CERTIFYING DEPARTMENT RECOMMENDATION LETTER**

1. When the department review has been completed and the department recommendation letter has been uploaded, the department notifies the Candidate to inspect the letter and sign the Certification of Departmental Recommendation. The following is the email notification sent:



Clicking the "Review & Certify" button will direct you to the review file.

2. Once directed to the review file, the following note box is displayed on the review file homepage.

Review	: Candidate Gold 2 - Merit - 07,	/01/2023
	Your review and certification is requested	
	<ol> <li>Description: Description: Descriptido: Description: Description: Description: Description: Des</li></ol>	completeness and accuracy ready for department review
Details Do	cuments	
Details		Preparation steps
Name	Candidate Gold 2 - Merit -	All required documents have been upl

Step 1 has a link to Inspect the Candidate PDF. Candidate PDF and links to the individual documents in the file can also be found by clicking the "Documents" tab.

3. Once the file has been inspected, Step 2 provides a link to certify the file. Once clicked, a pop-up message appears with the option to upload a response and certify.

Certification of Department Recommendation	×
I certify that:	
<ol> <li>I was informed of the impending academic review for this personnel action and of the relevant University of California policies and procedures related to the academic review process.</li> </ol>	
2. I was provided opportunity to ask questions, to supply information and evidence to be used in the review, to make any desired additions, to suggest names for external referee letters (if required), an to provide, in writing, names of persons who, for reasons set forth by me, may not provide objective evaluations.	d !
3. I had the opportunity to inspect all non-confidential materials in my academic review file.	
<ol> <li>I understand I may submit a written statement for inclusion in this file in response to or commenting upon material in the file.</li> </ol>	)
Note: Your acceptance on this certification indicates only that you acknowledge the procedures required University policy were followed prior to departmental consideration of your file. It does not imply your agreement or disagreement with any of the assessments or opinions in the academic review file. If you have questions, contact your department's academic personnel representative before accepting.	уу
□ Laccept	2
Optional: upload your response Choose File No file chosen  Step 2 (optional)	5
Cancel	n

**IMPORTANT!** If a correction is needed on the file: Certify the file, then the department staff can return the file to the proper stage by requesting corrections. The candidate or department staff can then upload or replace a file. The file will need to be re-certified.

# IV. CANDIDATE IS NOTIFIED OF FINAL ACTION

1. When a final decision is made by either the Dean or campus level authorities, candidates will receive a notification like the one below:

UCI Scholars	Steps
Your Merit fina	l action letter is now available:
If you have any Message from E A custom n	questions, please contact your department. Eva Monica Barson: Department Analyst 1, ere by your department staff.
This message is	generated by ScholarSteps, UCI's online academic personnel system.

Clicking the "Download Candidate PDF" button will open a browser of the completed review file pdf that you can download for your records. You will have access to your file, including the CAP report (in a CAP reviewed file), Chair's independent letter (if applicable), and Dean's recommendation letter (in a CAP reviewed file), in addition to previously submitted materials.