# Table of Content

1. Getting access                                      Page 3
2. Navigating the dashboard                           Page 5
3. Searching for a scholar                            Page 7
4. Creating new scholar                               Page 8
5. Entering new appointment                           Page 14
6. Adding supplemental appointment                    Page 19
7. Reappointments                                     Page 21
8. Exceptions                                        Page 24
9. Uploading documents                                Page 25
10. Entering restricted entity information             Page 26
11. Submission and comments                           Page 29
12. Review and approval                               Page 30
13. Changes                                          Page 31
14. Amendments                                       Page 32
15. Anniversary date                                  Page 33
16. Separation                                       Page 35
17. Addition information and reminders                Page 36
18. Reporting technical issues                        Page 39
19. FAQs                                             Page 40
20. Contact information and resources                 Page 41
Getting Access

Prerequisite: Attend PPS Update: policy and procedure for postdoctoral scholar class.

Why? Because Postdocs are exclusively represented by the UAW and it is very important that staff understand the contract stipulations before entering appointments.

To get access to RSAS, send an email to Lisette Reynolds (lrslipper@ucsd.edu) and in the message include:

1. Your name
2. Employee ID number
3. Official PPS department name
4. Email address
5. Phone number
Using RSAS

RSAS is an online application that is accessed through the internet.

STEP ONE - Preparation

1. Collect information and documentation from the PI and/or Scholar so that when you access RSAS, you can easily and quickly enter the information.

2. Scan documents individually into a file folder on your hard drive.

STEP TWO - Access RSAS System

1. Open internet browser (Mozilla, Chrome, Explorer, Safari)
   If you are using Microsoft Internet Explorer, please make sure you have the latest version.


2. Enter your Single Sign On ID and password.
   If you do not have a Single Sign On ID, please contact your department DSA.
Navigation
Upper Tabs

**Home Tab** lists your pending actions

**Scholars Tab** is where you search or create new entries
**Reports Tab** provides you with a notification mechanism for Postdoc and Visiting Scholar appointments that are expiring in 90 days, 60 days, & 30 days. You have to check the “notify me” box to activate the reports.

**Admin Tab** is for use by OPVSA staff to manage the system.

**About Tab** has technical and programming information.
1. **Before** adding any information into RSAS, search for the person to avoid duplicate entries. Try different spelling, hypens, no hyphens, etc to ensure thorough search.

2. Hover over Scholars tab and choose “Search.”

3. Enter last name and first name in search fields. Your department should automatically appear in the department field. If not, enter the first few letters of your department name or scroll list, and click **Search** button to select your department.

   If the scholar is new to your department, search “All Departments.”

4. If the Scholar does not exist in the system, you will have to create the scholar’s initial entry by adding the “person” into the system (before adding an appointment).
Creating a Scholar

There are two button options to create a New Scholar

1. Pull down menu in upper Scholars Tab. Choose “Create New”
2. Or in the lower tab Search Window Tab, choose “New” Tab.
Creating a Scholar

Step 1: In the **Person Tab**, enter the legal name. Ensure that the name is consistent with name that will be entered in PPS, including use of hyphens and capitalization. However, do not use foreign letters or symbols, and do not capitalize the whole name. Also do not put a space after the last letter in the last name.

Until you create the Person, the system will not allow you to create an Appointment.
Creating a Scholar

Step 2: In the AKA, Also Known As field, include maiden name, nickname or if two postdocs have the same name add department to help differentiate the two scholars.

Step 3: Enter the citizenship information
Creating a Scholar

- Step 4: Continue to complete the rest of the page
Creating a Scholar

Step 5: Enter the degree in the Degree Tab

1. To add new, click on the “+ add degree entry” sign.

2. To change what was entered, click on the “edit” and then make the change(s).

3. Search your hard drive for scanned supporting material and upload to RSAS. If you do not have a scanner, note in the comments that you will be emailing or campus mailing the documentation.
Creating a Scholar

Step 6: Enter Postdoc experience in the Experience Tab

For Postdoctoral Scholar, enter relevant appointments since doctoral degree. This information will be used to calculate postdoctoral years of experience and appointment limit. Check the “Count as Postdoctoral Experience box” if the previous experience is a postdoctoral appointment.

For Visiting Scholar, enter current appointment at home institution. If industry, enter title in position field and name of company in “Description” field.
Step 7: Entering a New Appointment

1. Click **Appointments** Tab

2. Click **+Add Appointment**

3. Choose type of appointment. Will default to Primary Initial.

Types of Fields:
- **Restricted**: You have to select from the menu (action type, title code, department).
- **Assisted**: Will populate based on previous selection but allow you to change (end date and salary rate).
- **Open**: Field requires you to input (begin date, mentor name, building and room, description of research).
Step 7: Entering a New Appointment

4. Choose appropriate title code from drop down menu, based on funding source.

5. Enter start date as mm/dd/yy or choose from calendar. End date will populate one year later. It can be edited.

6. Choose step based on years of postdoctoral experience. Rate will populated based on current scale. Populated rate field can be edited if off scale.

7. Be careful in selecting Department name. If you enter appointments for more than one Department and select and save the wrong Department for the appointment, you will need to email rsasdev@ucsd.edu to request revision of the Department.

8. Enter mentor’s name. Be consistent on spelling and version of name i.e., Lawrence Goldstein vs. Larry Goldstein. Do NOT include the degree at the end of the name.
Step 7: Entering a New Appointment

9. Enter building name and room or lab number. Avoid acronyms.

10. Enter detailed description of research.

Information entered will populate the offer letter. Therefore, enter the information as you wish it to appear on the offer letter. Use proper punctuation, write out building acronyms, and make sure scientific terms are spelled correctly.
12. Click **+ Add Funding Source** and additional fields will appear.

13. Enter Index

14. Index description will populate. Change to offer letter friendly description. For Postdoc Paid Directs and Fellows, add funding agency name (e.g. American Heart Association, Marie Curie, JSPS, etc.)

15. Choose Funding Mechanism and Description of Funding from drop down menus

16. If the funding is a fellowship and the award amount is less than/different than the annual salary rate, add the amount in this field.

17. Dates will populate based on appointment but can be edited

18. **SAVE**

19. To add additional funding information, click **+Add Funding Source** and repeat the process.

For Visiting Scholars
- Index number field = **NONE**.
- Index Description field = **NONE**.
- Percent time = 0
Step 8: Entering Contact Information

Information is used to populate offer letter and it is REQUIRED by the UAW contract.

Capitalize first letter in each name field. Do NOT capitalize all the letters.

If off campus, complete. If on campus, just bldg and room.

Select the appropriate title.
Process of Adding Supplementation or Compensation

1. Click on primary appointment or +Add Appointment

- Smith, Joseph
- Appointments
- Person
- Degrees
- Experience
- Compliance
- Training
- IDP
- Comments
- Show Active Only
- + Add Appointment
- Primary: 08/30/2012 - 08/29/2013, 3253
Process of Adding Supplementation or Compensation

2. Choose type of appointment: Supplemental or Additional

3. Choose the primary appointment that you want to add onto.
Reappointments

Effective 10/17/16 the UAW contract requires reappointments to be for a minimum of 2 years and subsequent reappointments to be 1 year. When you add a new appointment, choose “primary reappointment” or “primary subsequent appointment” as appropriate:

If the duration of the reappointment is less than the required minimum, after you save, a “Please Justify Below” alert will show:
A yellow Justification box will appear below (you may need to scroll to see complete box).

Click “edit” to enter to activate the box.
Reappointments

• From the pull down menu, select the appropriate justification reason.

• Add detailed information in the Justification Notes field.

• Click “Save Justification” button
Exceptions

If the action requires an exception, click **Exceptions**.

Exception popup window will appear.

1. Check the down arrow to open the exception drop down table.
2. Selection exception reason
3. Click the **Acknowledge** button
4. Upload supporting documentation.
Uploading Documentation

Upload supporting material by browsing your hard drive, choosing document and uploading.

Suggested naming convention for your documents:
• Last Name-Acceptance 2012
• Last Name-Annual Review 2012
• Last Name-Bibliography
• Last Name-CV
• Last Name-Degree
• Last Name-Funding 2012
• Last Name-Offer 2012

Tag the document for appropriate identification

Upload proof of funding for Visiting Scholars to the Appointments tab. If self-funded, an email stating this fact will suffice.
All foreign persons and entities must be checked against a list of Restricted Parties. To register for and get access to the Restricted Party Screening tool visit: [https://www.visualcompliance.com/USR](https://www.visualcompliance.com/USR) Once you have registered and completed the normal appointment process, open the Compliance tab.

a. If the person is a US Citizen or Permanent Resident, check the “Screening Not Required” box.

b. For all other foreign persons, proceed with screening on the website [https://www.visualcompliance.com/](https://www.visualcompliance.com/) and then check the “I confirm I have performed the screening” box.
c. If no records are not found, check the “No Matching Records Found” circle and enter “no results” in the Screening Notes box. Click the “Save” button and continue with the appointment.
d. If results are found, check the “Matches/Results/Alerts Returned” circle and add result comments in the Screening Notes box.
e. Click the “Save” button to forward the result to Export Control.

Do not submit the appointment to OPVSA until you receive a notice from the Export Control Office that the match is cleared. Once you receive the notice from Export Control, you can submit the appointment to OPVSA.
The Restricted Party Screening Alert will display once the “Save” button is clicked for those appointments that results were returned.
When you click the Submit button, a **Comments Window** will pop up. Add comments, such as:

- Type of action.
- Degree expected (date) and will forward documentation when received.
- Change in title from X to Y based on receipt of Z fellowship.
- Salary/stipend increase 2% b/c off scale.
- Mid-cycle increase due to fellowship award.
- Change in start and end date due to delay in visa/entry to US.

Comments will appear in the **Comments Tab** and visible for tracking purposes; therefore, keep them short, descriptive, and professional.

Click **Submit**.
Review and Approval

Once the action is submitted, it will move to the next reviewer. The reviewer may send back for additional information or correction, or approve.

Once it reaches OPVSA, it will be reviewed and if approved an offer letter will be uploaded into RSAS and notification sent to you about its availability.

You may print or email the offer letter to the Scholar. In your communication, it is advisable to indicate the deadline to accept the offer.

Once you receive the acceptance from the Scholar, scan, upload to RSAS and tag as “Acceptance Letter.”

Then the process is complete.
Making Changes

Changes can be made by amending, editing, and adding information.

Amending is an action code and used when you change information on an existing appointment and you want approval for that change.

Editing allows you to change information as you’re working on an entry. There are certain data fields that you can’t change later (ie department) or delete (ie person).

Before you make any changes in an active appointment, consider the timing of the change.

For example, if a 3252 appointment started 7/1/12, but on 9/1/12 you want to change the appointment to a 3253. The correct action would be to CHANGE the end date of the 3252 appointment to 8/31/12 and submit the change to OPVSA for approval. Once approved, then ADD a new 3253 appointment effective 9/1/12 through 6/30/13.

If you try to amend more than one appointment line during the same action, the system will lock you out. Therefore, please remember to change one line, get OPVSA approval, and then amend the second appointment line.

If you want to change the funding midcycle. Change the existing funding end date, and add a new funding block.
Amendment

- Choose Amendment when the action requires a new offer letter.
  - For example, when postdoc changes from a 3252 to 3253 based on receipt of fellowship or T32 slot.
  - Change in begin and end dates due to change in arrival of either a postdoc or a visiting scholar.
  - Midcycle increase
  - Midcycle appointment change (eg adding short term additional compensation)

Enter reason for action and click the Proceed to Edit button. Edit necessary field(s) and click the Save button under the Department Contact Information. Once edit is completed, click the Submit button at the top to submit file to OPVSA.
As part of the 1/2017 RSAS enhancement, anniversary date now appears in the upper right corner of the Appointment screen.

The system will derive the date based on initial appointment/hire date.
To manually change the anniversary date, click on the “change anniversary date appointment” link. Add the new anniversary date and save. Refresh your screen and the new date should appear in the Work Experience Summary box.

Policy allows anniversary date to be changed only when the postdoc receives a fellowship that is effective before the current appointment end date, and pays equal to or more than the next salary level. This allows appointment period to match funding source period.
Separation

If a scholar separates before the registered end date, click on the active appointment, choose the action “separation”, click edit, and change the end date of the appointment and the end date of the funding. In the Comments, indicate reason for separation and upload any necessary documentation (ie Out of PX unit request, resignation).

If the scholar reaches normal end date and the appointment will not be renewed, no action is required.
Information is “live.” Any changes you make is permanent. Therefore, please ensure all entries are accurate, appropriate and action is entered correctly.

If you clicked +Add Appointment, but change your mind, refresh the page in your browser bar and the cascade will disappear.
Reminder

Postdoctoral Scholars

- New postdoc offers must be given no later than 7 days after appointment start date, and reappointments must be given within 30 days PRIOR to start date.
- Reduction in salary request is an exception that must be approved by the UAW. In order to process in a timely fashion, requests must be submitted to OPVSA 3 months in advance of reappointment start date to allow UAW the required 30 days for review.
- Postdocs may NOT work without an official offer of appointment.
- Temporary supplement in pay, that is not part of the base pay, may be withdrawn as appropriate.

Visiting Scholars

- Visiting Scholars are not eligible to receive compensation for work performed. Per APM 430-20, payments for travel and incidental research expenses, as well as health insurance may be allowable. Additionally, Visiting Scholars may receive supplementary support in the form of a cost of living allowance, or support to help defray the amount of money spent on food, clothing, housing and other basic necessities. Please contact visitingscholar@ucsd.edu for more information.
Patent Acknowledgement

- New postdocs must sign the Patent Acknowledgement as part of their new hire paperwork.

Patent Amendment
- Starting November 28, 2011, employees hired on or before October 31, 2011 will be contacted through University email by an outside vendor, VR Election Services (VRES). The email will provide instructions on how the employee can electronically sign the Amendment. This electronic process will continue through February 29, 2012, and during this period, employees who have not yet signed will receive occasional reminders to complete the signature process prior to the end date. Those employees who do not have e-mail addresses will receive information and instructions by USPS mail.

- If a postdoc has not signed the new Patent Acknowledgement, reappointments will not be approved until the form has been signed.

- How do I sign the Amendment through At Your Service Online (AYSO)?
  To sign the Amendment through AYSO,
  - Sign in to your personal account at http://atyourserviceonline.ucop.edu/ayso/.
  - Select "My Patent Amendment" in the "About [Your Name]" section in the upper left corner of the page. From there, you’ll be taken to a page that displays the Amendment.
  - Select the "I Agree" button at the bottom of the page to electronically sign the Amendment.

- I neglected to print out the confirmation page; is there a way to get a copy?
  - Sign in to your personal account at http://atyourserviceonline.ucop.edu/ayso/.
  - Select "My Patent Amendment" in the "About [Your Name]" section in the upper left corner of the page. If you’ve already signed the Amendment, you’ll see the date and time you signed the Patent Amendment along with the Amendment itself.
How to report RSAS technical issue

If you have a technical problem with RSAS, please send an email to rsasdev@ad.ucsd.edu with the following information:

1. Your name
2. Email address
3. Name of the browser and version (eg. Internet Explore v 9.5, Chrome v 2.0, Safari v.8.0)
4. Screen shot (Place cursor on the page and press Alt button with PrtScn button)
5. Name of Scholar you were working on.
6. Describe what you were trying to do when the error occurred.
GENERAL ISSUES

1. I created a person but now he is not coming to UCSD. How can I delete him from the system?
   Because the system is open and in order to maintain data integrity, department users may not delete persons.
   Please email rsas@ad.ucsd.edu with name and reason for the deletion.

2. I’m entering information but it is not showing up?
   Try refreshing the page.

3. The institution where the Scholar earned his degree or had an appointment is not in the drop down list.
   Try entering the name of the institution in case it is listed differently than how it appears in the CV. If it is not in the list, send an email to rsas@ad.ucsd.edu to add the institution. Please include the full name of the institution.
Contacts and Resources

To request access to RSAS, ask a general system question, or request to add institution to system, e-mail Lisette Reynolds at lrslipper@ucsd.edu.

If you have a technical issue, e-mail rsas@ad.ucsd.edu with a screen shot of error message or problem and description of what you were trying to do when the error message or problem occurred.

For general policy and “how to” questions, please contact:

Merritt Bradford * merritt@ucsd.edu * (858) 534-3553 for Postdoctoral Scholars.

Lisette Reynolds * lrslipper@ucsd.edu * (858) 822-7510 for Visiting Scholars.

Website: rsas.ucsd.edu