

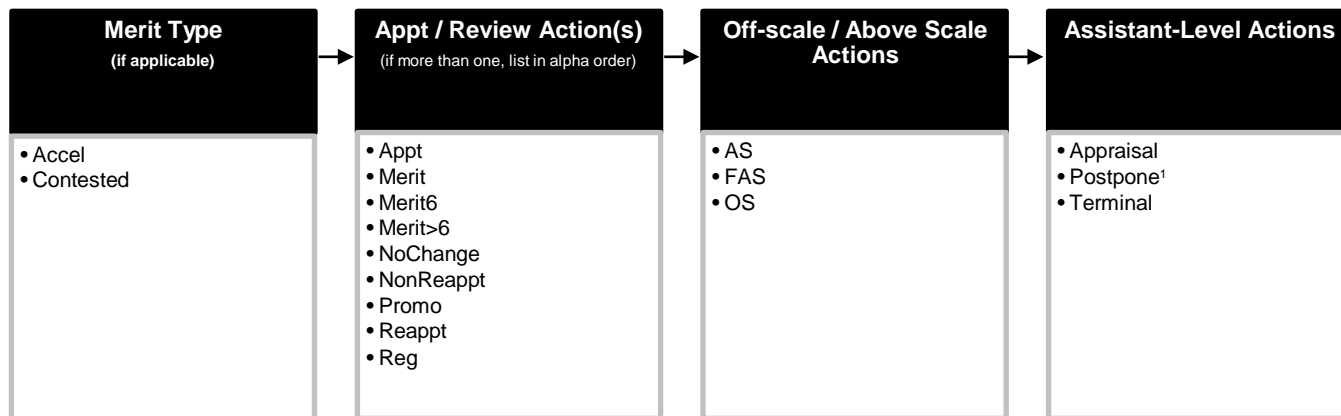
**ATTACHMENT B: ACADEMIC PERSONNEL FILE NAMING GUIDELINES  
FOR ELECTRONIC FILES 12/10/2010 (UPDATED SEPT 2015)**

**APPOINTMENT AND REVIEW FILES**

**General File Naming Convention**

LAST, FIRST - DEPT - Code - MM\_DD\_YY (e.g. SMITH, JOHN - ECON - AccelMeritReappt - 07\_01\_15)

File names should include descriptors for the recommended action(s), followed by the proposed effective date. If more than one action is being proposed, the descriptor for each action type should be included with no spaces between codes, following these general guidelines for their order:



The table below provides a list of the file descriptor codes used for each action:

| Action   | Code                  |
|--|-----------------------|
| Above Scale  | AS                    |
| Acceleration   | Accel                 |
| Appointment  | Appt                  |
| Appointment – Series Change                                | ApptSC                |
| Appointment – Temporary (e.g. Unit 18 NSF Pre-6, Visiting) | ApptTemp              |
| Appointment – Unit 18 NSF Initial Continuing               | ApptCont              |
| Appraisal  | Appraisal             |
| Contested Merit  | ContestedMerit        |
| Endowed Chair (appointment or reappointment)               | Endowed               |
| Further Above Scale  | FAS                   |
| Merit  | Merit                 |
| Merit to Step VI   | Merit6                |
| Merit through Step VI                                      | Merit>6               |
| No Change  | NoChange              |
| Non-Reappointment  | NonReappt             |
| Off-Scale (Bonus or Market)                                | OS                    |
| Postponement of Promotion review                           | Postpone <sup>1</sup> |
| Pre-Emptive Retention                                      | PreReten              |
| Promotion  | Promo                 |
| Reappointment  | Reappt                |
| Regularization   | Reg                   |
| Retention  | Reten                 |
| Spot Compression   | SpotComp              |
| Terminal reappointment                                     | Terminal              |

<sup>1</sup> Postpone should only be used if no additional review actions at the Assistant-level are proposed (i.e. if the assessment of an appointee's readiness for promotion is off-cycle from his/her normal merit/reappointment review cycle). If the department proposes to postpone promotion review in tandem with the appointee's final merit/reappointment review, Postpone should not be included in the file name.

**ATTACHMENT B: ACADEMIC PERSONNEL FILE NAMING GUIDELINES  
FOR ELECTRONIC FILES 12/10/2010 (UPDATED SEPT 2015)**

**APPOINTMENT AND REVIEW FILES (CONTINUED)**

**Joint Appointments**

***File Naming Convention***

LAST, FIRST - DEPT1(DEPT2) - Code1(Code2) - MM\_DD\_YY (e.g. SMITH, JANE - CHEM(MED) - Merit(Reappt) - 07\_01\_15)

When submitting files for academic appointees with appointments in more than one department, the home department abbreviation should be followed by the secondary department abbreviation in parentheses. The code for each action type should follow the same format. The code for each action type proposed in each department should be included following the same guidelines outlined above for singular appointments.

***Dean's Recommendation Letters for Joint Appointments in Multiple Divisions/Schools***

Home department dean coordinates file with other departments/deans.

**Responses to Additional Information Requests and Preliminary Recommendations**

When submitting responses to additional information requests and preliminary recommendations, it is not necessary to include the file action descriptors. Please save as:

Additional Information: LAST, FIRST - DEPT - ~~Response~~Addtl - MM\_DD\_YY  
(e.g. SMITH, JOHN - ECON - ~~Response~~Addtl - 07\_01\_15)

Response to Preliminary Recommendation: LAST, FIRST - DEPT - ~~Response~~Prelim - MM\_DD\_YY  
(e.g. SMITH, JOHN - ECON - ~~Response~~Prelim - 07\_01\_15)

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**DEFERRALS, FAMILY ACCOMMODATIONS, EXCEPTIONS, LEAVES, SABBATICALS AND SEPARATIONS**

**General File Naming Convention**

LAST, FIRST - DEPT - Code - Qtr(AY)Yr (e.g. SMITH, JOHN - ECON - ALASSabb - SP15)

The table below provides a list of the file descriptor codes used for each action:

| <b>Action</b>   | <b>Code</b>     | <b>Quarter/Year</b>                                    |
|---|-----------------|--|
| Sabbatical Requests (dean's authority)                        | ALASSabb        | FA15/WI16/SP16/SU16 AY15-16                            |
| Leave Requests (dean's authority)                             | ALASLeave       | FA15/WI16/SP16/SU16 AY15-16                            |
| Change of Work Location (dean's authority)                    | ChgWrk          | FA15/WI16/SP16/SU16 AY15-16                            |
| Conferral of Emeritus title on Non-Academic Senate appointees | Emeritus        | Effective date of retirement MM_DD_YY                  |
| Family Accommodations Reporting Form                          | FAR             | FA15/WI16/SP16/SU16 AY15-16                            |
| First Deferral  | Defer1          | FA15/WI16/SP16/SU16 AY15-16                            |
| Second Deferral   | Defer2          | FA15/WI16/SP16/SU16 AY15-16                            |
| Layoff  | Layoff          | Effective date of layoff MM_DD_YY                      |
| Recall to Active Duty   | Recall          | Effective date of appt MM_DD_YY                        |
| APM-025 Exception   | ExceptAPM025    | FA15/WI16/SP16/SU16 AY15-16                            |
| Change of Work Location Exception                             | ExceptChgWrk    | FA15/WI16/SP16/SU16 AY15-16                            |
| Leave Exception   | ExceptLeave     | FA15/WI16/SP16/SU16 AY15-16                            |
| Sabbatical Leave Exception                                    | ExceptSabbLeave | FA15/WI16/SP16/SU16 AY15-16                            |
| Separation (includes retirement)                              | Separate        | Effective date of separation MM_DD_YY                  |
| Service Modification Request (Unit 18)                        | ServMod         | Effective date of modification MM_DD_YY                |
| Miscellaneous Actions   | Misc            | Quarter/Year or Effective date of action as applicable |

Additional Notes: Attachment A lists department abbreviations that should be used in the file naming conventions for all documents submitted electronically through Sharepoint. Proposed effective dates should be included in a six digit format with underscores between month, day, and year, e.g. 07\_01\_15.