**Standard Date Criteria:**

*For items to appear on the Annual Faculty Report...*
- Start Date and End Date fields MUST be within the requested report timeframe or the End Date field is left blank;
- For items with one date reference, that date MUST fall within requested review timeframe.

Academic Year field on Yearly Data screen must = 2014-2015 so items entered on subsequent screens that fall within this review period (Sept 1, 2014–Aug 31, 2015) appear in generated AFR.

<table>
<thead>
<tr>
<th>Where information appears in your AFR...</th>
<th>Screens and Fields where that information is entered in your electronic AFR</th>
<th>Fields or other criteria that determine where items appear in your AFR...</th>
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<tr>
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<td>• Academic Year field on Yearly Data screen must = date range for review period (e.g. 2014-2015)</td>
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<td>• Title</td>
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<td></td>
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<td>• Tenure Decision Date:</td>
<td>• Start Date at University of Massachusetts, Boston</td>
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AFR SECTION 2: TEACHING

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<th>Scheduled Teaching</th>
<th>Course Term and Year must fall within requested report period (Sept 1, 2014–Aug 31, 2015)</th>
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<tr>
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<td>Term and Year</td>
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<tr>
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<td>Course Prefix and Course Number</td>
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<td>Course Name</td>
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<td></td>
<td>Number of Credit Hours</td>
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<td>Official Enrollment Number</td>
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<td>Course Load Reduction Comments</td>
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<td>Sabbatical Comments</td>
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</tr>
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<td></td>
<td>On Leave Comments</td>
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### Section 2B: Changes in Teaching Approach or Responsibilities

<table>
<thead>
<tr>
<th>Scheduled Teaching</th>
<th>Scheduled Teaching Notes</th>
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</thead>
<tbody>
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<td><strong>Term and Year</strong></td>
<td>Course Term and Year must fall within requested report period (Sept 1, 2014–Aug 31, 2015)</td>
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<tr>
<td><strong>Course Prefix and Course Number</strong></td>
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<tr>
<td><strong>Section Number</strong></td>
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<td><strong>Course Name</strong></td>
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<td><strong>Pedagogical Innovations Comments</strong></td>
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<td><strong>New Teaching Material Comments</strong></td>
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<tr>
<td><strong>Enhanced Student Learning Activities Comments</strong></td>
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</tr>
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### Section 2Ci: Doctoral, Masters, Honors Thesis Students

<table>
<thead>
<tr>
<th>Directed Student Learning</th>
<th>Directed Student Learning Notes</th>
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<tbody>
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<td><strong>Involvement Type/ Other</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Student(s) First/ Last Name</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Title of Student’s Work</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Student’s Home Department</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Course Prefix and Course Number</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Number of Credit Hours</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Stage of Completion</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Start and End Dates</strong></td>
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</tr>
<tr>
<td><strong>Comments</strong></td>
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</tr>
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</table>

Involvement Type contains the text “Chair”, “Director” or “Capstone”. Start and End Dates must meet Standard Date Criteria.*

### Section 2Cii: Students on Whose Committees You Served

<table>
<thead>
<tr>
<th>Directed Student Learning</th>
<th>Directed Student Learning Notes</th>
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</thead>
<tbody>
<tr>
<td><strong>Involvement Type/ Other</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Number of Students</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Student(s) First/ Last Name</strong></td>
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</tbody>
</table>

Involvement Type contains the text “Member” or “Reader”. Number of students appearing in report is derived from number of student names entered in “Student Information” drop down field. Start and End Dates must meet Standard Date Criteria.*

### Section 2D: Major Advising and Counseling Responsibilities

<table>
<thead>
<tr>
<th>Academic Advising</th>
<th>Academic Advising Notes</th>
</tr>
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<tbody>
<tr>
<td><strong>Number of Undergraduate Students Advised</strong></td>
<td></td>
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<tr>
<td><strong>Number of Graduate Students Advised</strong></td>
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</tr>
<tr>
<td><strong>Description of Advising Activities</strong></td>
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</tr>
</tbody>
</table>

Academic Year must be within the requested report range or blank.
### Section 2E: Other Teaching and Counseling Activities

**Directed Student Learning**
- Involvement Type/ Other
- Student(s) First/ Last Name
- Title of Student's Work
- Student's Home Department
- Course Prefix and Course Number
- Number of Credit Hours
- Stage of Completion
- Start and End Dates
- Comments

**Non-Credit Instruction Taught**
- Instruction Type/ Other
- Sponsoring Organization
- Number of Participants
- Academic or Professional?
- Start and End Dates
- Description

- Involvement Type is anything other than those containing “Chair”, “Director”, “Capstone”, “Member” or “Reader”.
- Start and End Dates must meet Standard Date Criteria.*

### SECTION 3 – RESEARCH, CREATIVE OR PROFESSIONAL ACTIVITY

**Section 3A1: Research Activity – Completed (in print)**

- Order of items listed on report from Intellectual Contributions screen will depend on user’s selection of APA or MLA citation style on Custom Report screen.
- Rapid Reports default to APA citation style.
- If “Alternative Name You Publish Under…” contains a value, that name (as it appears in field) will appear in citations mapping from Intellectual Contributions screen.
- Current Status for items in Section 3A1 must = “Published”.

*Standard Date Criteria listed at top of Page 1*

Updated: 08/13/2015
### a. Books and Monographs

**Intellectual Contributions**
- APA book citations:
  - Author(s)
  - Year Published
  - Editor’s Name/ Issue # or Edition
  - Title of Contribution
  - Page Numbers
  - Publisher City, State, Country
  - Publisher Name
  - Web Address or DOI Link
  - Abstract Synopsis Comments
  - Reprint/ Republished Comments

- MLA book citations:
  - Author(s)
  - Title of Contribution
  - Editor’s Name
  - Volume
  - Issue # or Edition
  - Publisher City, State
  - Publisher Name
  - Year Published
  - Page Numbers
  - Web Address or DOI Link
  - Medium of Publication
  - Abstract Synopsis Comments
  - Reprint/ Republished Comments

- Current Status = “Published”.
- Dates subject to Standard Date Criteria.*

### b. Textbooks

**Intellectual Contributions**
- APA/ MLA book citation style
- Abstract Synopsis Comments
- Reprint/ Republished Comments

- Current Status = “Published”.
- Contribution Type = "Book, Textbook-New", "Book, Textbook-Revised".
- Dates subject to Standard Date Criteria.*

### c. Edited Book, Anthologies, Collections, Bibliographies

**Intellectual Contributions**
- APA/ MLA book citation style
- Abstract Synopsis Comments
- Reprint/ Republished Comments

- Current Status = “Published”.
- Dates subject to Standard Date Criteria.*
<table>
<thead>
<tr>
<th>d. Articles in Journals</th>
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| **APA journal citations:** | - Author(s)  
- Year Published  
- Title of Contribution  
- Publisher Name  
- Volume  
- Issue # or Edition  
- Page Numbers  
- Web Address or DOI Link  
- Abstract Synopsis Comments  
- Reprint/ Republished Comments |
| **MLA journal citations:** | - Author(s)  
- Title of Contribution  
- Publisher Name  
- Volume  
- Issue # or Edition  
- Year Published  
- Page Numbers  
- Medium of Publication  
- Web Address or DOI Link  
- Abstract Synopsis Comments  
- Reprint/ Republished Comments |
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<th>e. Chapters in Books</th>
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- Contribution Type starts with text “Book, Chapter…” or “Book, Contribution…”  
- Dates subject to standard date criteria.” |
| **Abstract Synopsis Comments** |  
**Reprint/ Republished Comments** |
<table>
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<th></th>
<th>Intellectual Contributions</th>
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</tr>
</thead>
</table>
| f. Reviews, Abstracts Pamphlets | APA journal citations:  
- Author(s)  
- Year Published  
- Editor Name  
- Title of Contribution  
- Title of Larger Work  
- Page Numbers  
- Publisher City, State  
- Publisher Name  
- Web Address or DOI Link  
- Abstract Synopsis Comments  
- Reprint/ Republished Comments  
MLA journal citations:  
- Author(s)  
- Title of Contribution  
- Title of Larger Work  
- Editor Name  
- Volume  
- Issue # or Edition  
- Publisher City, State  
- Publisher Name  
- Year Published  
- Page Numbers  
- Medium of Publication  
- Web Address or DOI Link  
- Abstract Synopsis Comments  
- Reprint/ Republished Comments  |  
- Current Status = “Published”.  
- Contribution Type is one of…  
- Dates subject to standard date criteria.* |
| g. Papers Published in Proceedings | APA/ MLA citation style  
- Abstract Synopsis Comments  
- Reprint/ Republished Comments  |  
- Current Status = “Published”.  
- Contribution Type contains text “Proceeding”.  
- Dates subject to standard date criteria.* |
| Section 3A2: Research Activity – Works Completed and Accepted for Publication | APA/ MLA citation style (according to Contribution Type)  
- Abstract Synopsis Comments  
- Reprint/ Republished Comments  |  
- Current Status = Accepted”, “In Press or in Production” or “Under Contract”  
- Dates subject to Standard Date Criteria.” |
### Section 3A3: Research Activity – Works Completed and Submitted for Review

**Intellectual Contributions**
- APA/MLA citation style (according to Contribution Type)
- Abstract Synopsis Comments
- Reprint/Republished Comments
- Current Status = “Submitted”, “Revising to Resubmit”.
- Dates subject to Standard Date Criteria.*

### Section 3A4: Research Activity – Work in Progress

**Intellectual Contributions**
- APA/MLA citation style (according to Contribution Type)
- Abstract Synopsis Comments
- Reprint/Republished Comments

**Research Currently in Progress**
- Collaborator(s)
- Title
- Status
- Description
- Current Status = “Working Paper”, “In Preparation; Not Yet Submitted” or contains NO value.
- Dates subject to Standard Date Criteria.*

### Section 3B1: Creative Activity: Performance, Shows, Compositions, etc. – Completed

**Artistic and Professional Performances and Exhibits**
- Performer/Exhibitor/Lecturer(s)
- Type of Work/Other
- Work/Exhibit Title
- Start and End Dates
- Description
- Status = “Completed”
- Dates subject to Standard Date Criteria.*

### Section 3B2: Creative Activity: Performance, Shows, Compositions, etc. – Completed but Not Presented, Performed, Produced or Published

**Artistic and Professional Performances and Exhibits**
- Performer/Exhibitor/Lecturer(s)
- Type of Work/Other
- Work/Exhibit Title
- Start and End Dates
- Description
- Status = “Completed But Not Released”
- Dates subject to Standard Date Criteria.*
### Section 3B3: Creative Activity:

**Performances and Exhibits**
- Performer/Exhibitor/Lecturer(s)
- Type of Work/ Other
- Work/ Exhibit Title
- Start Date
- Description

- Status = “In Progress”
- Dates subject to Standard Date Criteria.*

### Section 3C1: Professional Activity not included in 3A or 3B

**Intellectual Contributions**
- APA/ MLA citation style (according to Contribution Type)
- Abstract Synopsis Comments
- Reprint/ Republished Comments

**Contracts, Fellowships, Grants and Sponsored Research**
- Investigator(s)
- Type/ Other
- Title
- Sponsoring Organization
- Date Awarded
- Amount
- Start and End Dates of Funding
- Abstract Comments

**Presentations**
- Presenter/ Author(s)
- Presentation Type/ Other
- Presentation Title
- Conference/ Meeting Name
- Sponsoring Organization
- Location
- Start and End Dates
- Abstract Comments

**Intellectual Contributions:**
- Current Status = “Published”, “In Press or in Production” or “Under Contract”.
- Dates subject to Standard Date Criteria.*

**Contracts, Fellowships, Grants and Sponsored Research:**
- Current Status = “Funded”

**Presentations:**
- Dates contain a value.
### Intellectual Contributions
- APA/MLA citation style (according to Contribution Type)
- Abstract Synopsis Comments
- Reprint/Republished Comments

### Contracts, Fellowships, Grants and Sponsored Research
- Investigator(s)
- Type/Other
- Title
- Sponsoring Organization
- Date Awarded
- Amount
- Start and End Dates of Funding
- Abstract Comments

### Presentations
- Presenter/Author(s)
- Presentation Type/Other
- Presentation Title
- Conference/Meeting Name
- Sponsoring Organization
- Location
- Date
- Abstract Comments

### Intellectual Contributions:
- Current Status = “Accepted”, “Submitted”, “Revising to Resubmit”, “In Preparation; Not Yet Submitted” “Working Paper” or contains NO value.
- Dates subject to Standard Date Criteria*.

### Contracts, Fellowships, Grants and Sponsored Research:
- Current Status = “Pre-Review”, “Currently Under Review” or contains NO value.

### Presentations:
- Dates contain NO value.

---

*Standard Date Criteria listed at top of Page 1*
## Intellectual Contributions

- APA/MLA citation style (according to Contribution Type)
- Abstract Synopsis Comments
- Reprint/Republished Comments

### Intellectual Property

- Inventor(s)
- Patent Title
- Patent Nationality
- Patent Type
- Patent Copyright#/ID
- Licensed Name
- Assigned Name
- Date Submitted
- Date of Application
- Date Approved
- Date Licensed
- Date Renewed

### Contracts, Fellowships, Grants and Sponsored Research

- Investigator(s)
- Type
- Title
- Abstract Comments

## Intellectual Contributions:

- Contribution Type = “Media Presentation” or “Material Regarding New Courses/Curricula”
- Dates must meet Standard Date Criteria.*

### Intellectual Property:

- “Date Submitted”, “Date of Application”, “Date Approved”, “Date Licensed” or “Date Renewed” must meet Standard Date Criteria.*

### Contracts, Fellowships, Grants and Sponsored Research:

- Current Status = “Not Funded”.

---

## SECTION 4 - SERVICE

### Section 4A1: University Service - Departmental and Administrative Contributions

#### Department

- Position/Role or Other
- Service Name
- Elected or Appointed
- Start and End Dates
- Responsibilities Comments

#### Department:

- Start and End Dates must meet Standard Date Criteria.*

---

### Section 4A2: University Service - School, College, or University and Administrative Contributions

#### College

- Position/Role or Other
- Service Name
- Served Ex-Officio
- Start and End Dates
- Responsibilities Comments
- Key Accomplishments Comments

#### University

- Position/Role or Other
- Service Name
- Elected or Appointed
- Served Ex-Officio
- Start and End Dates
- Responsibilities Comments

#### College:

- Start and End Dates must meet Standard Date Criteria.*
### Annual Faculty Report (AFR) – Cross Reference Guide

<table>
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<tr>
<th>Section 4B: Service to Profession or Discipline</th>
<th><strong>Professional</strong></th>
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<td>• Start and End Dates must meet Standard Date Criteria.*</td>
<td>• All Public Position/ Roles</td>
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<table>
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<th><strong>Public</strong></th>
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<td>• All Public Position/ Roles</td>
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<td>• Served Ex-Officio</td>
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<td>• Responsibilities Comments</td>
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<td>• Key Accomplishments Comments</td>
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<th>Section 4D: Other service activities or accomplishments</th>
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<th><strong>Public</strong></th>
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</tbody>
</table>

*Standard Date Criteria listed at top of Page 1

UMass Boston, AFRSupport@umb.edu

Updated: 08/13/2015
## SECTION 5 – OTHER ACTIVITIES AND ACCOMPLISHMENTS

**Intellectual Contributions**  
APA/ MLA citation style (according to Contribution)

**Awards and Honors**  
- Award or Honor Name  
- Organization/ Sponsor  
- Purpose  
- Scope  
- Date received  
- Description

**Professional Development**  
- Activity Type/ Other  
- Title  
- Sponsoring Organization  
- City/ State/ Country  
- Credit Hours  
- Start and End Dates  
- Description

**Professional Memberships**  
- Name of Organization  
- Scope of Organization  
- Start and End Dates  
- Description

**Licenses and Certifications**  
- Title of License/ Certification  
- Sponsoring Organization  
- Scope  
- Date Obtained  
- Expiration Date  
- Description

---

*Standard Date Criteria listed at top of Page 1*  
Updated: 08/13/2015
### SECTIONS 6 – REVIEW COMMENTS Department Personnel Committee

<table>
<thead>
<tr>
<th>Comments of Department Personnel Committee</th>
<th>Review Comments and Archive</th>
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<tr>
<td>Signature of the Chair of Personnel Committee</td>
<td>DPC Chair Comments</td>
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<td>Date</td>
<td>DPC Chair Name</td>
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<td></td>
<td>DPC Chair Sign-off Date</td>
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- All fields are mapped into AFR Report and are “R” (Restricted) to users’ set-up with that specific Department’s security.

### SECTIONS 7 – REVIEW COMMENTS Department Head or Chair

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<thead>
<tr>
<th>Comments of Department Head or Chair</th>
<th>Review Comments and Archive</th>
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<tbody>
<tr>
<td>Signature of Department or Chair</td>
<td>Dept. Chair Comments</td>
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<tr>
<td>Date</td>
<td>Dept. Chair Name</td>
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<td></td>
<td>Dept. Chair Sign-off Date</td>
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- All fields are mapped into AFR Report and are “R” (Restricted) to users’ set-up with that specific Department’s security.

### SECTIONS 8 – FACULTY RESPONSE COMMENTS

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<th>Comments of Department Head or Chair</th>
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<tbody>
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<td>Signature of Department or Chair</td>
<td>Faculty Comments</td>
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- All fields are mapped into AFR Report

### SECTIONS 9 – REVIEW COMMENTS Dean

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<th>Comments of</th>
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<tbody>
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<tr>
<td>Date</td>
<td>Dean Name</td>
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- All fields are mapped into AFR Report and are “R” (Restricted) to users’ set-up with that specific College’s security.