

## Unit Administrator/Chair Completes Evaluation

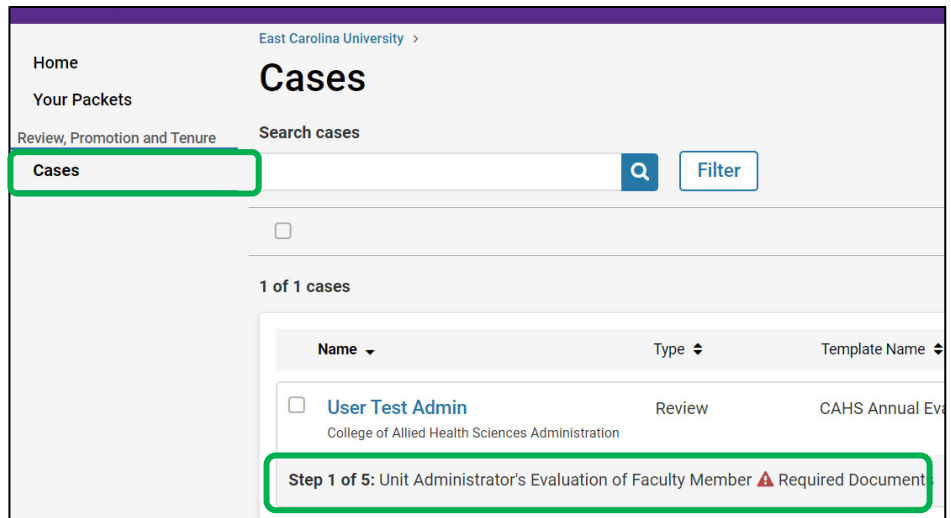
When a faculty member submits their annual report packet components, the case will automatically be forwarded to Step 1 of the workflow – Unit Administrator’s Evaluation for Faculty Member. The chair/evaluator will receive an email notification when the annual review case has been assigned to their step.

### Steps to complete in this step:

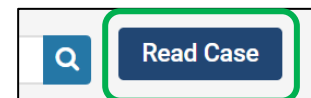
1. Review the case components and complete the evaluation
2. Share the evaluation with the faculty member and meet with the faculty member
3. Complete meeting confirmation form and send the case forward for faculty sign off

### 1. Navigate to the case directly from the email or log in to Faculty 180 directly. Cases assigned to a reviewer will appear on their Home Screen.

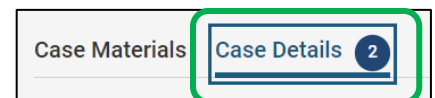
- *Note: You may have access to other cases in other workflow steps because of the security role you are assigned. If you utilize the “Cases” menu, make sure you are only editing, forwarding and closing cases that are in your queue. Cases in your queue will appear on your home screen.*



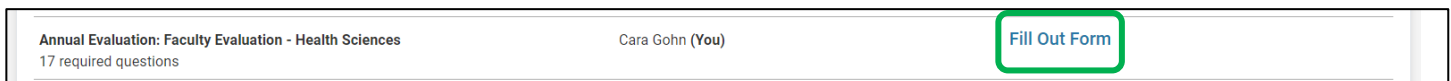
- View a summary of the entire case by clicking on “Read Case.” Within the “Read Case” window, use the left-hand categories to navigate through documents and attachments.
  - Click “Download” to download the document you are currently viewing, or the entire packet.
  - Click “Return to Case” to close this view.



- All required documents and forms are accessible in the “Case Details” tab. Scroll down on the Case Details tab until you see the “Required Items” section.



- You will see two electronic forms to fill out.
  - First, fill out the “Annual Evaluation: Faculty Evaluation” form.
    - Click “Fill Out Form.”



*Note - Within the instructions of the form there is a link to the [Annual Evaluation Calculator](#). Use this calculator as a tool to calculate the numerical score for each category and the cumulative total.*

There are 5 categories to enter in ratings with the evaluation form, 2 of which are optional. Those categories are:

- Teaching
- Scholarship
- Service
- Patient Care (If Applicable)
- Other Duties (If Applicable)

For each category you will need to enter a qualitative rating. Choose the ratio button that applies.

- Enter the quantitative rating that falls within the numerical range chosen above. *(For example, if “Outstanding” was chosen as the qualitative rating, then the number entered for the numerical score must fall between 4.5 – 5.0)*
- Enter the Relative Weight of the category. This value is a percentage that should be expressed as a decimal.

**Teaching \***

Choose the appropriate qualitative rating.

Poor (0 - 1.49)

Fair (1.5 - 2.49)

Good (2.5 - 3.49)

Very Good (3.5 - 4.49)

Outstanding (4.5 - 5.0)

Unable to Rate

**Teaching Overall Numerical Total \*** Options ▾

Multiply the numerical rating by the relative weight to get the teaching rating to two decimal places.

Type 0 if this category does not apply.

- Calculate the total score for the category by multiplying the numerical score and relative weight.

- Finally, for each category, enter comments or justifications related to the overall score given in the comments text box.

**Continue these steps for each applicable category.** At the bottom of the form total all of the overall numerical scores for each category into one final numerical total. Then, choose the qualitative score that represents that numerical total.

- Click “Submit Form” when all questions are completed.

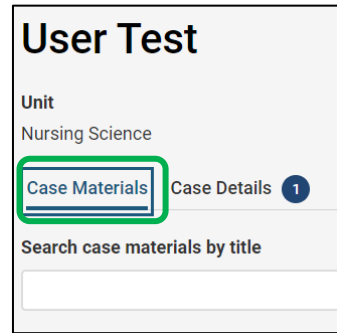
Last saved on May 24, 2022 at 9:08 AM EDT

[Submit Form](#) [Save Responses](#) [Return to Case](#)

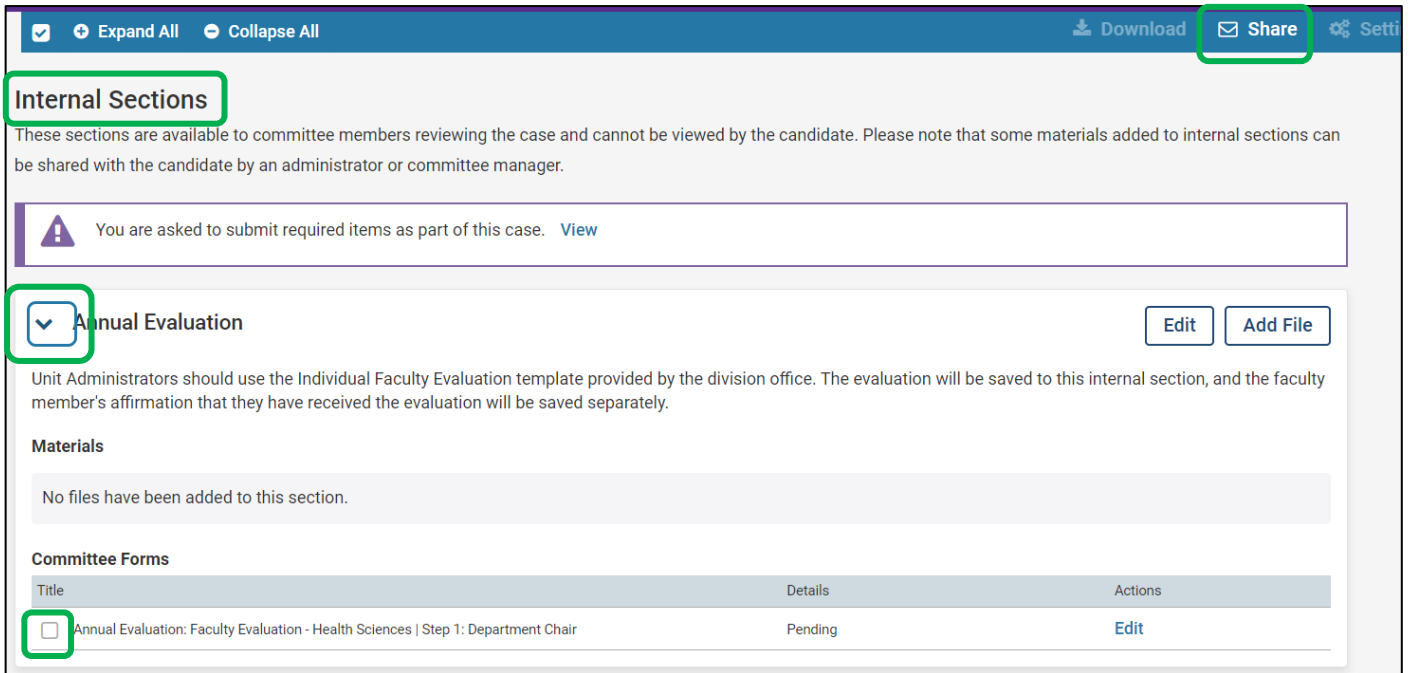
**Note: Submitting the form does not share it with the faculty member, nor does it move the case forward. The form is in draft form and the case remains in the unit admin/chair’s queue. The case can remain in the unit admin/chair’s queue until after the annual evaluation meeting occurs. The unit admin/chair will continue to have editing rights to this form as long as it remains in their queue.**

Continue to next page...

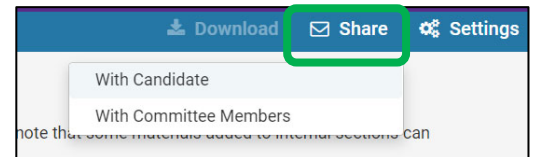
2. To share the annual evaluation with the faculty member, navigate back to the “Case Materials” tab.



- Scroll down to “Internal Sections” and open up the “Annual Evaluation” section of the case using the blue arrow.

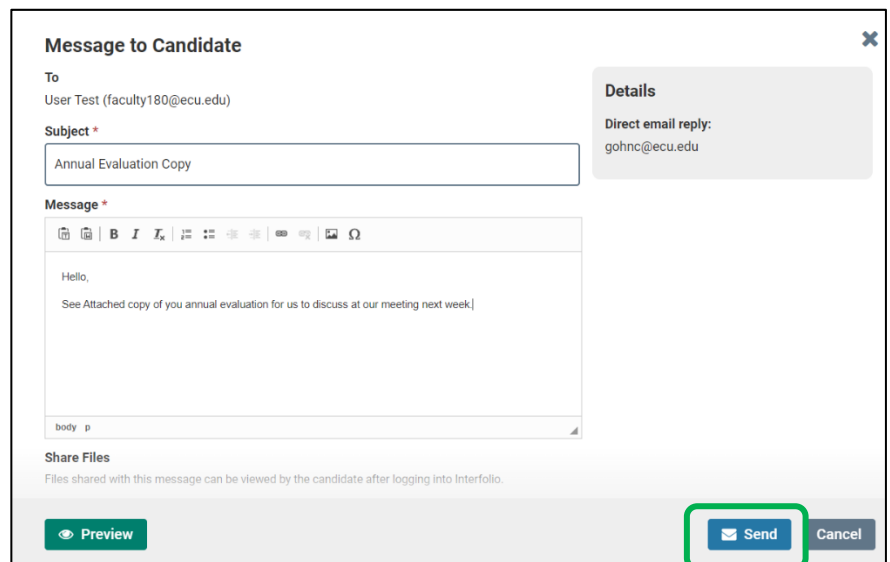


- Click the box next to the “Annual Evaluation” form, then “Share” and “With Candidate” at the top of the screen.

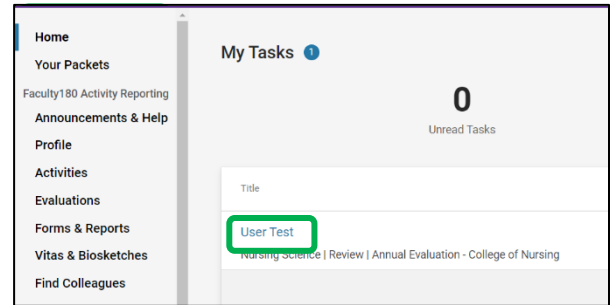


- You will be prompted to fill out the email subject and message that the faculty member will receive from Faculty180 notifying them that this document has been shared with them.
- Click “Send.”

***At this time, the chair can exit the case until after the evaluation meeting has been held with the faculty member. The case will remain in the unit administrator/chair’s queue during this time.***



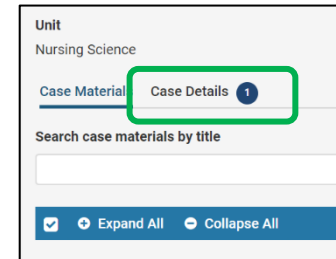
3. After the annual evaluation meeting is held, the evaluator will log back in to Faculty180 and find the case for each faculty member on their home screen or cases menu. Click on the name of the faculty member in which you want to finalize your workflow step.



- Click on “Case Details.” There should be one remaining task.

Scroll down to “Required Items” and fill out the remaining “Annual Evaluation: Meeting Date Confirmation” form.

*Note: If any edits are required to the Annual Evaluation: Faculty Evaluation, you can click “Edit Submission” next to that form.*



Required Items
1 missing

All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

**Forms**

Form Name	Assignee	Actions
Annual Evaluation: Faculty Evaluation - Health Sciences 17 required questions	Committee Managers	<a href="#">Manage Respondents</a>
Annual Evaluation: Faculty Evaluation - Health Sciences 17 required questions	Cara Gohn (You)	<a href="#">Edit Submission</a>
Annual Evaluation: Meeting Date Confirmation 1 required questions	Committee Managers	<a href="#">Manage Respondents</a>
Annual Evaluation: Meeting Date Confirmation 1 required questions	Cara Gohn (You)	<span style="border: 1px solid green; padding: 2px;">Fill Out Form</span>

- The Meeting Date Confirmation form will require the chair to enter the date in which the meeting took place and any other notes or comments that should be documented.
- Move the case forward by clicking on the “Send Case” button. The next step in the workflow will appear automatically. Click on “Forward to.”
- An email draft will appear. **Enter a subject.** The body of the email will default to system generated text. The text can be edited with a personal message. Click “Continue” to send the email and forward the case.

