Step 3 – Unit Administrator Completes Evaluation, Recommendation Memo & Personnel Action Summary Form

In this guidance you will learn how to:
1. Access the case
2. Review the PAD
3. Upload the Cumulative Evaluation
4. Complete the Recommendation
5. Share the Cumulative Evaluation and Receive the Candidate Response
6. Complete all other requirements
7. Send the case forward

When the unit committee completes Step 2 of the workflow they will forward the case to Step 3 and the unit administrator will receive an email.

1. Unit administrators can access the case from the emails, Faculty180 home screen, or by navigating to the “Cases” menu under the Faculty180 Reviews section. Use the search bar to search by name, if needed. Navigate to the case by clicking on the faculty member’s name.

2. Unit administrators can choose “Read Case” to see all attached documentation from the candidate and previous reviewers and committees.
3. The unit administrator should navigate to the “Case Details” tab to complete the required documents. A number will appear next to the “Case Details” tab that indicates how many tasks require completion.

Scroll down to the “Required Items” section and upload the Cumulative Evaluation and final copy of the Personnel Action Summary Form by clicking “Add.”

Choose the appropriate section when uploading the documents, then click “Add.”

4. Next, complete the recommendation form. Click “Fill Out Form.” Select the recommendation and then click “Submit Form.”
5. The cumulative evaluation must be shared with the candidate within Faculty180 Reviews. Navigate back to the “Case Materials” tab. Scroll down to the “Cumulative Evaluations (formerly in Part B)” section, open the section using the arrow in the left corner, click the checkbox next to the evaluation document, then click “Share” > “With Candidate.”
Enter a subject line and message to the candidate. The recommendation of the committee is not automatically shared with the candidate when the form is completed. The unit administrator may want to include the recommendation in the email message when sharing the Cumulative Evaluation with the faculty member. Then, click the checkbox next to “Enable” file response.

Message Reason = Candidate Response
Deadline = Today + 7 Working Days
Section for Response = Candidate Responses

After the candidate responds to the evaluation, the unit administrator will receive an email notification that a response was received.

The response can be viewed in the “Read Case” window or at the bottom of the “Case Materials” page under the “Candidate Response” section.

If the candidate response is received outside of Faculty180, then the response can be uploaded to the “Candidate Responses” section on the “Case Materials” tab.

When the candidate comments have been received or uploaded, the committee chair will fill out the “Indicator of Candidate Response” forms on the “Case Details” tab of the case.
After answering the form questions, click “Submit Form.”

6. After all required components are completed, the unit administrator will forward the case by clicking on the “Send Case” button and choosing “Forward to.”

The unit administrator will be prompted to enter an email subject and click “Continue” to email the appropriate party in the next workflow step.

The unit administrator’s evaluation and recommendation must be completed by the 1st Tuesday in December.