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

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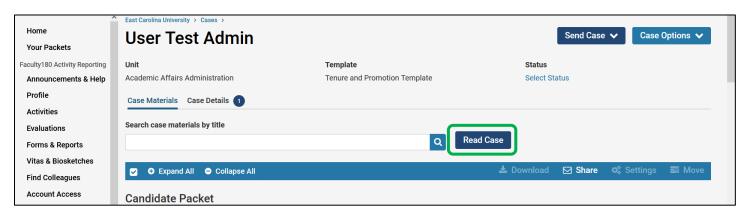1. Access the case
2. Review the PAD
3. Upload the Cumulative Evaluation
4. Complete the Recommendation
5. Share the Cumulative Evaluation and Receive the Candidate Response
6. Complete all other requirements
7. Send the case forward

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.
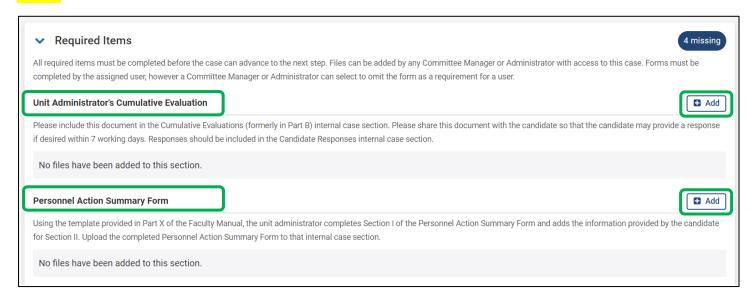

2. Unit administrators can choose "Read Case" to see all attached documentation from the candidate and previous reviewers and committees.
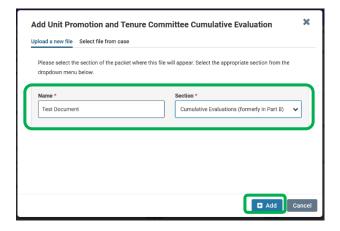
3. The unit administrator should navigate to the "Case Details" tab to complete the required documents. A number will appear next to the "Case Details" tab that indicates how many tasks require completion.

Scroll down to the "Required Items" section and upload the Cumulative Evaluation and final copy of the Personnel Action Summary Form by clicking "Add."
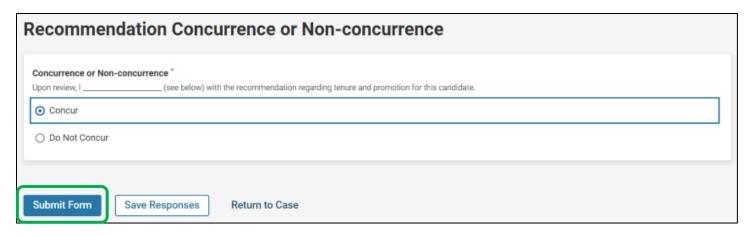
East Carolina University > Cases >

User Test Admin

Unit
Academic Affairs Administration

Case Materials | Case Details 4

∨ **Required Items**   4 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. 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.

Unit Administrator's Cumulative Evaluation   ⊞ Add

Please include this document in the Cumulative Evaluations (formerly in Part B) internal case section. Please share this document with the candidate so that the candidate may provide a response if desired within 7 working days. Responses should be included in the Candidate Responses internal case section.

No files have been added to this section.

Personnel Action Summary Form   ⊞ Add

Using the template provided in Part X of the Faculty Manual, the unit administrator completes Section I of the Personnel Action Summary Form and adds the information provided by the candidate for Section II. Upload the completed Personnel Action Summary Form to that internal case section.

No files have been added to this section.

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

Add Unit Promotion and Tenure Committee Cumulative Evaluation   ✖

Upload a new file   Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

Name *   Section *

Test Document   Cumulative Evaluations (formerly in Part B)   ∨

                                                                    ⊞ Add   Cancel

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4. Next, complete the recommendation form. Click "Fill Out Form." Select the recommendation and then click "Submit Form."

Forms

Form Name	Assignee	Actions
Indicator of Candidate Response 1 required questions	Committee Managers	Manage Respondents
Indicator of Candidate Response 1 required questions	Cara Gohn **(You)**	Fill Out Form
Tenure and Promotion Recommendation 1 required questions	Committee Managers	Manage Respondents
Tenure and Promotion Recommendation 1 required questions	Cara Gohn **(You)**	Fill Out Form

Recommendation Concurrence or Non-concurrence

Concurrence or Non-concurrence *

Upon review, I _____ (see below) with the recommendation regarding tenure and promotion for this candidate.

◉ Concur

○ Do Not Concur

[Submit Form]   [Save Responses]   Return to Case

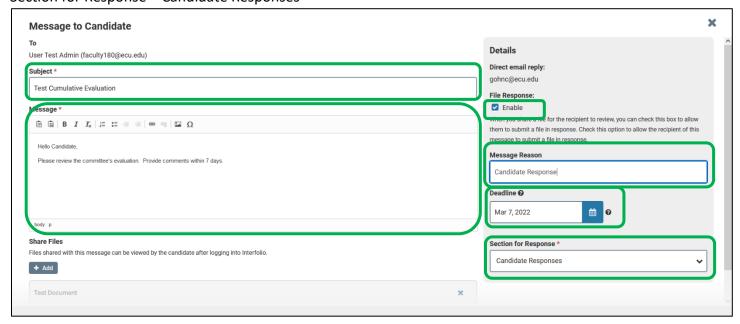**5. The cumulative evaluation must be shared with the candidate** within Faculty180 Reviews. Navigate back to the "Case Materials" tab. scroll down to the "Cumulative Evaluations (formerly in Part B)" section, open the section using the arrow in the left corner, click the checkbox next to the evaluation document, then click "Share" > "With Candidate."

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Case Materials   Case Details ③

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☐ ⊕ Expand All ⊖ Collapse All   ⬇ Download   ✉ Share ⚙ Settings ≡ Move

> Personnel Summary Action Form

With Candidate
With Committee Members

> External Evaluations   [Request Evaluation] [Add File]

⌄ Cumulative Evaluations (formerly in Part B)   [Edit] [Add File]

Materials

Title	Details	Actions
☑ Test Document	Added by Cara Gohn Mar 1, 2022	Edit

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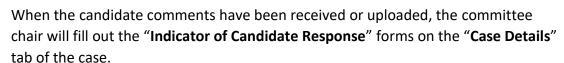
Message Reason = Candidate Response
Deadline = Today + 7 Working Days
Section for Response = Candidate Responses

Message to Candidate

To
User Test Admin (faculty180@ecu.edu)

Subject *
Test Cumulative Evaluation

Message *

Hello Candidate,

Please review the committee's evaluation. Provide comments within 7 days.

body   p

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

Test Document

Details

Direct email reply:
gohnc@ecu.edu

File Response:
☑ Enable
When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

Message Reason
Candidate Response

Deadline ⓘ
Mar 7, 2022

Section for Response *
Candidate Responses

After the candidate responds to the evaluation, the unit adminstrator 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.

User Test Admin

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Forms

Form Name	Assignee	Actions
Indicator of Candidate Response 1 required questions	Committee Managers	Manage Respondents
Indicator of Candidate Response 1 required questions	Cara Gohn **(You)**	Fill Out Form
Tenure and Promotion Recommendation 1 required questions	Committee Managers	Manage Respondents
Tenure and Promotion Recommendation 1 required questions	Cara Gohn **(You)**	Fill Out Form

After answering the form questions, click "Submit Form."

Indicator of Candidate Response

Does the candidate have a response to the cumulative evaluation? *

According to Part IX of the Faculty Manual, candidates shall receive copies of cumulative evaluations and to have 7 working days to respond. Does the candidate have a response to the cumulative evaluation? If yes, upload the response to the Candidate Responses internal case section. **[Internal note: discrepancy between FM and guidelines about whether to wait 7 days for response prior to sending the recommendation and cumulative evaluation to the unit administrator.]**

◉ Yes

◯ No

[Submit Form]   [Save Responses]   Return to Case

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."

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User Test Admin   [Send Case ∨]   Case Options ∨

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Activities   Case Materials   **Case Details**   Unit Tenure and Promotion Committee
Evaluations   **Reviewing as**   Cumulative Evaluation and
Forms & Reports   Unit Administrator   Recommendation Memo
Vitas & Biosketches
Find Colleagues   ∨   Instructions

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

Send Case Forward   ✕

Great job! You're sending the case forward to the next step, Dean's Recommendation Memo. The following reviewers will lose access to the case:

Unit Administrator | 1 members

The following reviewers will gain access to the case:

Dean | 1 members

☑ Send a message to the reviewers gaining access.
    If recipients respond to this message, their response will come directly to your email inbox.

Subject *

Step 3 Evaluation and Recommendation Completed

Message *

[formatting toolbar: B I I_x ≔ ⁝⁝ ⋸ ⋻ ⚭ ⚭ 🖼 Ω]

Dear committee members,

[👁 Preview]   [Continue]   Cancel

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

Faculty180 does not automatically notify candidates when a recommendation is recorded. Please notify the candidate, committee chair, and the unit administrator (if applicable) as required by the Faculty Manual. This notification must be sent outside of Faculty180.