Annual Evaluation Guidance in Faculty180 Reviews

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1. **Standard Annual Evaluation Workflow**

   **Annual Evaluation Case is opened** for each appropriate faculty member.

   **Step 0** – Faculty completes required documents within Faculty 180 Case Packet and Submits

   **Step 1** – Unit Admin/Chairs - Completes Evaluation of Faculty Member
   - While the case is in the queue of the unit administrator/chair, the following should occur: (1) The draft evaluation should be shared with the faculty member and the evaluation meeting completed
   - Chair/Evaluator completes final version of the evaluation with Faculty180
   - Chair/Evaluator completes the “Meeting Date Confirmation” form
   - Chair/Evaluator moves case forward to the Faculty Candidate

   **Step 2** – Faculty Member Affirms Receipt of Evaluation
   - Faculty Candidate has 7 days to respond with comments and responses
   - Faculty Candidate moves case forward to Chair

   **Step 3** – Unit Admin/Chairs: Evaluation Concluded
   - Chair/Evaluator reviews faculty response and completes confirmation form
   - Chair/Evaluator moves case forward to Dean’s Office

   **Step 4** – Dean's Office Representative
   - Dean’s Office Representative completes acknowledgement form and exports documentation
   - Dean’s Office Representative moves case forward to Division Level

   **Step 5** – Division Personnel Office
   - Division Office completes acknowledgement form and exports documentation
   - Division Office closes the case
2. Workflow FAQs

- **How do I know if something is in my queue for review?** The system will generate an email to you when an evaluation or review hits the step in which you are named a committee member or manager.

- **How do I know which documents or forms to complete within my workflow step?** When you open a case, go to the “Case Details” tab to see required documents and forms. The number displaying next to the tab indicates the number of required documents or forms.

- **What if a previous reviewer needs to make a correction?** Using the “Send Case” button, administrators or case managers in the current workflow step can send a case backwards to the previous reviewer.

- **What if a required form appears blank?** Clear your browser cache and cookies, close and re-open the browser, and then navigate back to the case form.

- **As the chair/evaluator how do I share the evaluation without moving the case to step 2?** You can (1) download the evaluation form from the “Read Case” screen and email it to the faculty member or (2) from the case materials screen, scroll down to the “Annual Evaluation” section, open the section using the arrow to the left of the section, and check the box next to the document to be shared. Then click “Share” at the top of the screen and choose “With Candidate.” You will be prompted to complete a subject line and message, click “Send.”
• As a reviewer, what if I have additional documents to attach that are not part of the required tasks in my step? On the case landing page, the “Case Materials” tab, you can scroll down to the “Internal Sections” portion and click “Add File” within the appropriate category.

3. Required Preliminary Actions – For Faculty Candidates

Faculty Candidates should complete sections in Faculty 180 activities before completing the packet required in the annual evaluation case. Faculty should complete their previous years’ goals and draft new annual goals in the “Annual Goals” menu within Faculty 180 Activities.

*Note – Colleges may have differing sections.*
4. Faculty Completes Case Packet/Annual Report

*Note - The following guidance refers to Step 0 of the annual evaluation workflow.*

Faculty will receive an email notification when the annual review case has been opened.

The annual evaluation case will appear on your Faculty180 Home screen and within the “Packet” menu. Click “View” to open.
Choose the “Packet” tab at the top of the screen to see all required components.

Faculty must regenerate their annual report/vita to capture any content that may have been updated after the annual evaluation case created. Regenerate the report by clicking "Regenerate" within the “Faculty180 Vita” section of your packet.

Complete the “Annual Evaluation Position Information” form. Click “Fill Out Form.”

Complete the required questions and click “Save Responses” at the bottom of the form, and then “Return to Packet.”
Click “Add” within each additional section to add required or supporting documentation for your unit administrator.

When the required documentation is completed, you may choose to “Preview” the document and/or “Submit” each section.

You can submit each required/additional case section individually. Submit all sections by the deadline required by your unit/college.

*Note: When all required sections are Submitted the case will automatically move forward to the next step.*
5. Unit Administrator/Chair Completes Evaluation

When a faculty member submits one, or all, of 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.

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 individual documents, annual reports, or any other attachments you would like to have in PDF form. You will be given the option 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 assigned within the “Case Details” tab. A number will appear next to “Case Details” to communicate how many documents or forms are required by the reviewer.

Note – If a case is routed to you and you do not see a number next to “Case Details” then you are a committee member. Only committee managers have the ability to submit documents and forms and move the case forward. At the bottom of the Case Details screen you can also see a list of members and managers.

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 – Health Sciences” 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 radio button that applies.

Next, the chair/evaluator will be asked to 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)
Next, the chair/evaluator will be asked to enter the Relative Weight of this category. This value is a percentage that should be expressed as a decimal.

Next, the chair/evaluator will be asked to 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.
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.

Next, fill out the performance of duties questions on Professional Ethics, DEI and Distance Education Professional Development.
Click “Submit” when all questions are completed.

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.

Once the form is submitted, the page will refresh and you will land on the “Case Details” tab.

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.

Then, click the box next to the “Annual Evaluation” form, then “Share” and “With Candidate” at the top of the screen. **NOTE:** If you do not share the annual evaluation with the faculty member using this feature, then they will lose access to the evaluation after the case is closed. It is recommended that the unit administrator/chair use the “share” feature to send the draft and final evaluation to the faculty member so that they will not lose access after the annual evaluation “Case” is closed. It is also recommended that the faculty member and unit administrator/chair download a copy of the annual evaluation packet in workflow Steps 2 and 3 for their own records.
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.”

![Message to Candidate]

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.

After the annual evaluation meeting is held, the unit administrator/chair will log back in to Faculty180 and find the case for each faculty member on their home screen. Click on the name of the faculty member in which you want to finalize your workflow step.
From the case landing page, click on “Case Details.” There should be one remaining task required.

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.
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.

Note - It is recommended that the FINAL evaluation be shared with the faculty member while the case is still in Step 1, and that any communications and evaluation meetings are held before the case is forwarded to the faculty member in “Step 2 – Faculty Member Affirms Receipt of Evaluation.” See the FAQ section of this document, and instructions above, for guidance on how to share an evaluation form with the faculty member within Faculty180 Reviews.
When all of the required items are completed the number next to the “Case Details” tab will disappear.

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.
6. Faculty Responds to Evaluation

After the unit administrator/chair completes Step 1 of the annual evaluation workflow, the case will be returned to the faculty member for review and response. **By this step, the annual evaluation should have been shared with the faculty member and the meeting between faculty and unit administrator/chair should have already occurred.** The faculty member will receive an email notifying them that the case is available for review and comment. The case can be viewed by navigating directly from the email or by logging in to Faculty 180 directly and viewing the case from the Faculty 180 home screen. Click on the case name to access the case.

*The case may appear multiple times on the home page of the faculty member. The first instance is the packet view. The second instance is Step 2 of the case workflow, which applies to these directions.*

Click on your name, which will appear as a blue hyperlink.

The next screen is the case landing page, “Case Materials.” View a summary of the evaluation case and all case documents by clicking on “Read Case.”
Click on the “Annual Evaluation” section to view the annual evaluation form filled out by the unit administrator.

You can click on “Download” to export/save a copy of any of the documents on this screen. It is recommended that the entire packet be downloaded and saved for your records in Dossier or other personal files.

Click “Return to Case” to close this view.

A new requirement will appear next to the “Case Details” tab. Click on Case Details to view the requirement.
Complete required forms by clicking “Fill out Form.”

The “Faculty Response to Annual Evaluation” form allows the faculty member to confirm that the annual evaluation was received and gives the faculty member the opportunity to enter formal comments or rebuttals that should be a part of the personnel file.

Type in your name as affirmation of receipt of the annual evaluation and provide any comments or rebuttals for your chair/evaluator.

“Submit” the form when completed.
When the required tasks are completed, the number next to the “Case Details” tab will disappear.

_The case will NOT automatically move forward when this form is completed._

Move the case forward by clicking on the “Send Case” button. The next step in the workflow will appear automatically. Click on the next step.

A draft email 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.
7. Unit Administrator/Chair Reviews Faculty Response and Confirms Completion

After the faulty member affirms and comments on the evaluation, the case will route back to the unit administrator/chair to complete a short “Affirmations of Completion” form concerning the faculty member.

The unit administrator/chair will receive another email when the case hits their queue, and the case can be accessed via that email and will also be available on the Faculty180 home screen. Click on the name of the appropriate faculty member to access the case, again.

First, review any comments made by faculty member by clicking on “Read Case.”
Faculty response comments can be found under the “Acknowledgements” section of the case. Scroll down to the 2nd page of the Faculty Affirmation to view any comments.

*It is highly recommended that you download a copy for your own records at this time, if needed.*

Click “Return to Case” to exit this view.

Then, complete the “Affirmation of Completion” form by navigating to the “Case Details” tab.
Click “Fill Out Form” next to the Unit Administrator’s Affirmations of Performance form under the “Required Items” section.

Read the final confirmation statements, check the “Completed” box, and leave any additional comments you want noted in the record. Then, click “Submit.”
The screen will refresh back on the “Case Details” tab.

When the required items are completed the number next to the “Case Details” tab will disappear.

Move the case forward by clicking on the “Send Case” button. The next step in the workflow will appear automatically. Click on the next step.

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.
8. Dean and Division Representatives Export Materials and Forward/Close Case

Note - The following guidance refers to Steps 4 and 5 of the annual evaluation workflow.

Dean and Division Representatives will receive an email notification when the annual review case has been assigned to their step.

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, click “Download” to download individual documents in which you are currently viewing, or the entire packet.

*Note: The “Position Information” tab will display the faculty name, Banner ID and other personnel information that may be useful when organizing the exported record.*

Click “Return to Case” to close this view.
All required documents and forms are assigned within the “Case Details” tab. A number will appear next to “Case Details” to communicate how many documents or forms are required by the reviewer.

Note – If a case is routed to you and you do not see a number next to “Case Details” then you are a committee member. Only committee managers have the ability to submit documents and forms and move the case forward. At the bottom of the Case Details screen you can also see a list of members and managers.

Add required documents and/or complete required forms.
When filling out a form, answer all mandatory questions and click “Submit” at the bottom of the screen.

When the required items are completed the number next to the “Case Details” tab will disappear.

Move the case forward by clicking on the “Send Case” button. The next step in the workflow will appear automatically. Click on the next step.
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.

If you are in the final review step of the case, the “Send Forward” button will only allow you the option of sending the case backward to the previous reviewer.

Instead, click on “Case Options” and choose “Close Case.”
Select the “20XX-20XX Academic Year” decision, then click “Save.”