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This guide is for Committee Members using the eFaculty system to review colleagues. It explains the setup and management of cases using eFaculty, and it details how to fill out and submit the required forms.

#### WHAT IS eFACULTY?

eFaculty is the suite of software from the vendor, Interfolio, which allows faculty to organize a digital portfolio that can be passed through a structured review process. We use eFaculty to help faculty efficiently upload evidence of their performance electronically, and to help reviewers adhere to policies while conducting reviews of their peers. eFaculty's functions include:

#### • Accepting and storing file uploads and case materials from candidates, and

displaying them in an organized manner in Faculty180 or Faculty Activity Reporting.

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	San José State University >			
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ew, Promotion and Tenure	25 of 273 cases			
ases emplates	Filtered By: Active Cases 🗙			
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eports	Name 🗸	Type ¢	Template Name 🗢	Status ¢
sers & Groups	New Candidate     San José State University	Reappointment	Annual & Cumulative Evaluation	
	Case Created: Waiting for an administrato	r to send the case forward		
	New Candidate     College of Business	Review	Retention - College of Business	
	Case Created: Waiting for an administrato	r to send the case forward		
	New Candidate     College of Engineering	Review	Retention - College of Engineering	
	Case Created: Waiting for an administrato	r to send the case forward		
0				

• Establishing review levels and reviewer assignments in RPT, recommendations are recorded and distributed along the way

- Storing digital copies of reviews.
- Facilitating communication between Faculty, reviewers, and department and college Administrators during

the review process.

## **KEY TERMS TO KNOW**

- **Interfolio:** Vendor for eFaculty. Interfolio is a secure online solution to help higher education with faculty evaluation workflow. Interfolio helps academic institutions ensure that these processes are transparent, equitable, efficient, and well documented.
- **eFaculty:** SJSU has branded its Interfolio product suite as eFaculty. In this guide, "eFaculty" and "Interfolio" are often used interchangeably.

- Faculty180/Faculty Activity Reporting (FAR): Two names used interchangeably. FAR is the area in eFaculty where faculty upload their review materials. The review module (RPT) pulls information--by date range and review type--out of FAR. This area is available 24/7 for faculty to input their activities.
- **Review, Promotion & Tenure (RPT):** The eFaculty module used for the faculty review process, delivering FAR data to reviewers as scheduled, and recording recommendations and decisions. Provides a platform for distributing recommendations and taking responses from faculty. (The reviewers' portion of Annual and Cumulative evaluation of Temporary Faculty will be conducted within the RPT module).
- Annual and Cumulative Evaluations: Annual Evaluations are required for all temporary faculty at least once during their appointment period. Cumulative Evaluations are required for initial and renewal, three-year appointments. Annual and Cumulative evaluations are conducted during the Spring Semester. For more information, visit the <u>Periodic Evaluations-Lecturers Instructions</u> and the <u>Periodic Evaluations-Lecturers Calendar</u>.
- **Candidate:** eFaculty refers to the individual being reviewed as a Candidate. "Candidate" and "Temporary Faculty" will be used interchangeably.
- **eFaculty Administrators:** Highest access level of a department within the RPT module. eFaculty Administrators can access documents, e-mail candidates and committees, and move a case forward and backward. They can also create standing committees. *Note:* A eFaculty Administrator will have access to settings, cases, and committees for an individual department. eFaculty Administrators are entrusted to maintain confidentiality and report any misuse of the platform.
- **Packet:** The collection of materials to be reviewed. Typically, this is drawn from Facutly180
- **Dossier:** Pronounced "' däsē,ā ." Area within eFaculty for all faculty to store and manage career information (e.g., fellowships, student evaluations, publications, evaluations) in one place. The Dossier is a collection of materials from which a packet may be derived and submitted for review. Packets submitted in RTP are commonly called "the dossier."
- **Committees:** Groups of users (or individuals) that can review cases at a given step of the review process. There are two types of committees: 1.) *Standing Committees*, which are set up outside of the cases so they can populate to multiple cases and 2.) *Ad Hoc Committees*, which can be set at multiple steps within a single case. *Note: Committees for Annual and Cumulative evaluations will be set up as Standing*

*Committees. Individual reviewers (e.g., chairs, deans) are situated in committees to allow assistants to be committee members to act on behalf of their office.* 

- **Manager:** The individual committee member responsible for submitting the official documents and/or forms for the review committee or an individual reviewer. There should be only one manager per committee. Department and college committee chairs will likely serve as manager for the committee.
- **Case:** Any faculty member's packet of materials undergoing a particular review process.
- **Template:** Review structure (i.e., steps, reviewers, forms) created in eFaculty that serves as the foundation for creating cases for a particular review type. All cases should be set up using an established template for the review type (e.g., annual evaluation) in a division (e.g., Chemistry Department). Templates provide policy compliant review platforms, and they make creating cases easier and more efficient.
- **Case Materials:** The contents of a case are organized into sections, which can be submitted by the temporary faculty for review. The eFaculty Administrator can lock or unlock a section for editing as needed. There are three types of sections within Interfolio:
  - O 1) Faculty Documents any documentation that the temporary faculty adds for review
  - O 2) Committee Documents any documentation that a eFaculty administrator adds for only committee members to view, or items uploaded by reviewers such as memos.
  - O 3) Forms Standard questionnaires to collect specific information from the faculty candidate or committee members. Committee forms must be completed by the members and/or manager for a review to move forward.
- **Case Steps:** After the temporary faculty organizes content into a packet and submits it for review, it goes through a review workflow. Each reviewer will be located in a case step, and will have access to materials until the case moves to the next step.
- For additional terms, visit <u>Glossary of Terms</u>.

## eFACULTY COMMITTEE MEMBER ROLE & TASKS

In eFaculty, Committee Members' tasks include, but are not limited to:

• Managing case lists



- Evaluating cases
- Submitting responses in forms
- Move the case forward (if one is the Committee Manager at the end of the review step)

#### LOGGING IN

<ol> <li>Log in through <u>https://one.sjsu.edu/</u> and search for "eFaculty"</li> </ol>	SAN JOSÉ STATE UNIVERSITY Concerning Spartan App Portal Browse Categories - Browse Categor
<ol> <li>You will be directed to eFaculty's homepage, and you will see "My Tasks." There should be two sections (also known as modules): Faculty180 and Review, Promotion, and Tenure (RPT).</li> </ol>	Image: Control of Cont
3. Logging in through <u>one.sjsu.edu</u> is preferred, but you can also log in by visiting <u>https://home.interfolio.com/</u> and selecting "Partner Institution." For security purposes, please <b>do not</b> select "Forgot your password?" or "Create an account." These options are not secured, and SSO Okta is not integrated. Only use your SJSU credentials to sign into eFaculty.	Sign In   Sign in with email   Email*   Enter Email   Password*   Enter Password

4. Enter "San José State University" and select "Sign In."	interfolio         Sign in through your institution         If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.         San José State University         Q         Sign In
	Sign in with an Interfolio account ➤
5. Enter your SJSU Credentials	Sign In   SISU ID Number   #########   Image: Please enter a username   Password   SISU One Password   Image: Imag

### VIEW AND MANAGE CASE LIST

 Note: You will see all cases on your Task list. When a case is moved, the case will no longer appear in your list.

 1. Select "Cases" from the side navigation menu

 Image: the second se



<ol> <li>To open a case, select the faculty member's name on the case. The name is a URL and will direct you to the case.</li> </ol>	11 of 11 cases         Filtered By:       Active Cases         Name -       Type ®         Toppe International Spartan       Reappointment         College of Business       College of Business         Case Created: Waiting for an administrator to notify candidate       Image: College of Business
<ol> <li>To filter the case list, Select "Filter" to sort by unit, case type, status, and active or closed cases.</li> <li>Tip: Filtering by "Active Cases" speeds up searches.</li> </ol>	Cases Search cases
<ol> <li>Select the "Reset Filters" to remove the selected filter</li> </ol>	Search cases   Q Filter     25 of 39 cases     Filtered By: Reappointment ×     Active Cases × Reset Filters

#### **USING THE DOCUMENT READER**

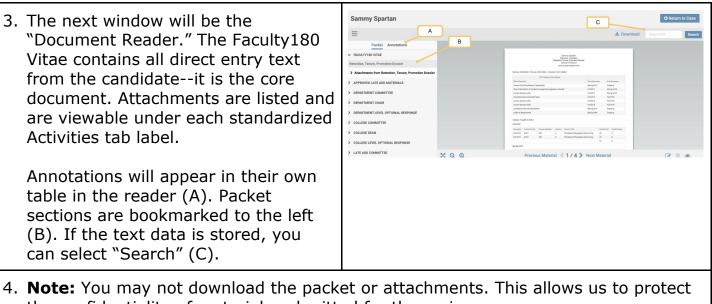
<ol> <li>Select "Cases" from the left hand navigation menu or select the name of the candidate to open the case.</li> </ol>	Home Reacting Production and Tears Cases
2. Select "Read Case"	Sammy Spartan Unit Accounting and Finance Case Materials Case Details Search case materials by title Case Materials Case Mater



#### **eFACULTY LECTURER EVALUATION REVIEWER TRAINING**

The next window will be the "Document Reader." The Faculty180 Vitae contains all direct entry text from the candidate--it is the core document. Attachments are listed and are viewable under each standardized Activities tab label.

Annotations will appear in their own table in the reader (A). Packet sections are bookmarked to the left (B). If the text data is stored, you can select "Search" (C).



the confidentiality of materials submitted for the review process.

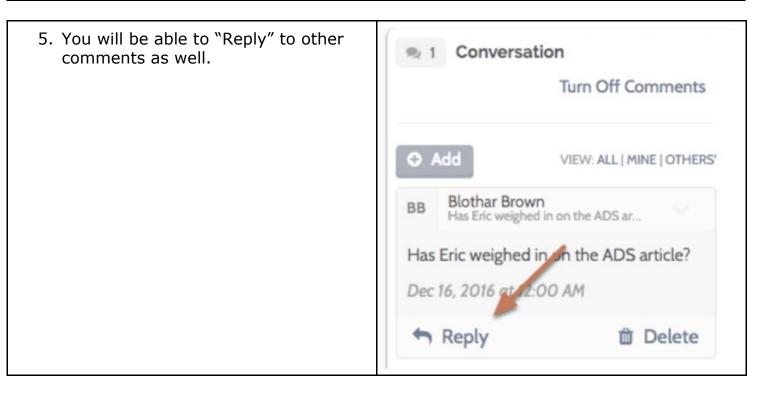
### COMMENTS FOR OTHER COMMITTEE MEMBERS (CHAT)

<ol> <li>Select the applicant's case either by selecting "Cases" or selecting on the name of the applicant.</li> </ol>	Here: Review, Prototion and Transe Cases
<ol> <li>Select "Case Details" and look for the "Conversation" panel on the bottom right of the page.</li> </ol>	Image: Sector
	tent the form as a regularment for a case.           Form E         Actions           Term Nome         Actions           Term Nome         Actions           Committee Member Approx (Digital Speaker)         Test Committee Member (Section State)             > Committee Members (2)         Conversation (0)           Actions         Not Comments for



3. Enter a comment and select "Add"	Add Comment     Tot Comment     Add a Comment     Add a Comment     Close
<ol> <li>Your comment will appear, along with the date and time. You also have the option to delete your comment.</li> </ol>	Conversation (1)          Add Comment       VIEW: ALL   MINE   OTHERS'         Im       Test Committee Manager         Add a Comment       Add a Comment         Aug 20, 2020 at 2:30 PM       Im Delete





## **COMMITTEE MANAGER - HOW TO IMPLEMENT A RECUSAL**

The committee manager is responsible for implementing recusals for cases where there are conflicts of interest or if committee members are choosing to abstain. When a member abstains, access to case materials should be cut off.	James Lee Unit Justice Studies Case Materials Search case materials by title	Read Case
You should go to the committee page by entering a case and selecting "Case Details."	Expand All     Collapse All     Candidate Packet     Any materials added to the candidate packet will be visible to the candidate and available for them to     files in an unlocked section before they submit.	o use in their curr
Scroll to the bottom of the page to the "Committee Members" section.	Faculty180 Vita Locked  Title  Annual and Cumulative Evaluation of Lecturers Spring 2020 - Fall 2020   8 attachments included	Details Generated Nov 9, 2020
At "Committee Members" use the dropdown caret to see members. Choose Edit to select a member to recuse.	Enal         Edit         Inversation (0)           James Lee         james lee         Mic Connents Vit           Cyntha Salnas         cyntha salnasğinga edit         Mic Connents Vit	Tum Off Comme

# SJSU UNIVERSITY PERSONNEL EFACULTY LECTURER EVALUATION REVIEWER TRAINING

The "Edit" feature shows manager information and a column labeled "Role." There are cancel symbols under "Role" in each member's row. Select the cancel symbol for the recusing member.	Name James Lee Cynthia Salinas	Email james.lee@sjsu.edu cynthia.salinas@sjsu.edu	Cl Add Member     Done       Role     Image: Manager       Image: Imag	Conversat No Comments Add Comm
There will be an indicator of the recusal, either a "+" with blue background or "Recused" with red background will appear.	Committee Members (1) Name Cynthia Salinas James Lee	Email cynthia.salinas@sjsu.edu james.lee@sjsu.edu	Role Recused	Conversa No Comments Add Comm

## **COMMITTEE MANAGER - DESIGNATING A NEW MANAGER**

In eFaculty, the person designated the "Manager" is typically the person elected to chair of the committee or the nominal reviewer such as the chair or dean. In some instances, non-chair members or staff will fulfill the role of manager for the responsible party. If someone other than the chair or nominal reviewer is designated manager, please indicate this fact somewhere on the form being submitted.	Same Case     Same       Unit     Template     Sature       Justice Studies     Annual Rakuation (No Committee) - College of Social     Sature       Case Materials     Case Details     Select Status    Case Materials Case Details
To assign the manager role to another person. 1. Open the case and select "Case Details."	James Lee Unit Justice Studies Case Materials Case Details Case Materials Case Details Case Materials Case Mate

# SJSU UNIVERSITY PERSONNEL EFACULTY LECTURER EVALUATION REVIEWER TRAINING

<ol><li>On the "Case Details" page, focus on the Committee Members Area.</li></ol>	Unit     Template     Status       Justice Studies     Annual Evaluation (Committee) - College of Social Sciences - Justice Studies     Select Statu       Case Materials     Case Details ①
3. Then, select "Edit"	Reviewing as Annual & Cumulative - Department Committee - Social Sciences - Justice Studies change
<ol> <li>If seeking to add a staff assistant, and they are not listed, an administrator would need to add them to the committee.</li> </ol>	Instructions Please complete and submit the evaluation form.      Required Items 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 Commonit the form as a requirement for a user.  Forms
<b>WARNING:</b> Adding unelected faculty or granting access to anyone who is not classified confidential is prohibited. Always follow the unit 3 collective bargaining agreement and campus policies in restricting access to confidential faculty materials.	Forms Form Name Assignee Actions Annual Evaluation - Form 1 Brequied questions Annual Evaluation - Form 1 Brequied questions Committee Members (2) Email Edit Conversa
<i>If ever in doubt about whether you may add a person to a "committee," please contact UP - FA for approval.</i>	
<ol> <li>After selecting "Edit" in step 3 above, select the "Manager" box in the row of the appropriate person.</li> </ol>	Add Member     Done       Name     Email       James Lee     james.lee@sijsu.edu       Cynthia Salinas     cynthia.salinas@sijsu.edu
6. Then select "Done."	Committee Members (2)     Email Edit
<ol><li>Upon return, the green manager label will appear next to the selected name.</li></ol>	Name     Email     Role       James Lee     james.lee@isjsu.edu       Cynthia Salinas     cynthia.salinas@isjsu.edu     Manager
<b>NOTE:</b> The system is set up for only one manager. Having more than one complicates the review process and leads to duplicate and possibly competing forms with differing statements. Under such circumstances, the review would be nullified.	

### **COMMITTEE MANAGER - SUBMITTING FORMS**

#### eFACULTY LECTURER EVALUATION REVIEWER TRAINING

The proper review forms have been preloaded into eFaculty for the reviewers. The committee manager is responsible for uploading one form for the entire committee.	James Lee Unit Justice Studies Case Materials Search case materials by title
To find the forms, open a case and go to "Case Details."	Candidate Packet     Any materials added to the candidate packet will be visible to the candidate and available for them to use in their curr files in an unlocked section before they submit.     Faculty180 Vita Locked     Title Details     Annual and Cumulative Evaluation of Lecturers     Spring 2020 - Fail 2020   8 attachments included
The forms are under "Required Forms". In Annual and Cumulative Evaluation, only the manager should fill out the form.	Annual & Cumulative - Department Committee - Social Sciences - Justice Studies change    Instructions  Please complete and submit the evaluation form.  Required Items All required Items All required tems 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.
Only the "manager" should submit a form for annual and cumulative evaluations. If there are additional individuals listed under "Forms," or persons other than the "manager" are being asked to fill out the review form, please contact UP - FA.	Annual & Cumulative - Department Committee - Social Sciences - Justice Studies change Instructions Please complete and submit the evaluation form. Please complete and submit the eva
To fill out the form as manager, select "Fill Out Form," appearing in blue text in the far right of the form's row under "Required Items."	Fill Out Form
You'll be directed to the required form. Please fill out the form with the appropriate information. Submit the form to allow other committee members to see it.	Annual Evaluation - Form 1 Annual evaluation of lectures for the prior calendar year are reported on this form by the primary evaluator(s)-the committee if one is evaluating, or the department chair if there will be no committee evaluation. Subsequent reviewers do not use this form. For example, if this form is submitted by a committee, the department chair may write a separate review if they did not serve on the committee. This chair would use "Annual & Cumulance Evaluation - Form 2". Faculty Appointment Information



Once the form is submitted, you can "Edit Submission," adding revisions using committee feedback.	Edit Submission
<b>NOTE:</b> Department committees are finished with their part upon submission of the final draft of the format the department level, department chairs manage the next step.	

### SENDING THE REVIEW TO THE CANDIDATE (OPTIONAL RESPONSE)

The Department Chair, and later the College Dean, will determine whether they <u>or</u> their administrative staff sends the review(s) to the candidate. *Department committees per se do not perform this function.* 

To send the review(s) to the candidate, go to Case Materials. Then select "Share," and choose, "With Candidate."	With Candidate With Committee Members be able to replace or delete any
An email interface will open. Choose "Add" at the bottom left of the screen.	Message to Candidate         To         James Lee (junes lee@-juigue du)         Subject         Message         Message Subject             Message             Message to (june lee@-juigue du)             Message             Message </td
Select all reviews and memos produced at your level to share with the candidate.	Share Files Files shared with this message can be viewed by the candidate after logging into interfolio. Select All Annual Evaluation - Form 1

#### eFACULTY LECTURER EVALUATION REVIEWER TRAINING

In the subject and message fields, copy and paste the standard "sharing review message for optional response" (Appendix in the eFaculty Annual & Cumulative Administrator Guide). Make sure that the due date in the message is always 10 calendar days after the review is sent and that it matches the date set in the next step. See the Annual & Cumulative Evaluation Calendar for preset deadlines. Late review distribution should still allow a 10 day response period, regardless of posted deadlines. Candidates may waive the 10 day period or submit "final drafts" early.	<image/>
To the right of the message field is a "Details" section. Check the box under "File Response" next to the word, "Enable."	Petails Details Direct email reply: iames lee@sigu.edu FIE Respire: Chable With you can check this box to allow them to aubmit a drift for the recipient to review, you can check this box to allow them to aubmit a drift for the recipient to review you can check this box to allow them to aubmit a drift for the recipient of this message to submit a www.response. g. please submit by (DATE).
Checking "Enable" opens more fields that	×
are needed.	Details
<ol> <li>Under "Message Reason," type Annual (or Cumulative) Evaluation - Optional Response.</li> <li>Use the calendar selector to choose the day at least 10 days out.</li> </ol>	Direct email reply:         james.lee@sjsu.edu         File Response:         Image: Imag
<i>Check to be sure this date and the date stated in the email message are the same.</i>	Deadline O 2. Mmm d, yyyy
<ol> <li>Under "Section for Response," choose the level from which the review is being sent.</li> <li>Department Committee if there will</li> </ol>	Section for Response * - Select Section - 3.



<ul> <li>be no chair review</li> <li>b. Department Chair if there is a chair review (regardless of whether there was a committee review)</li> <li>c. Dean or Appropriate Administrator for the college review</li> </ul>	
When the optional response period ends, move the case forward to the next step.	1         2         3           4         5         6         7         8         9         10           11         12         13         14         15         16         17           18         19         20         21         22         23         24           25         26         27         28         29         30         31

### **MOVING THE CASE FORWARD**

The Department Chair, and later the College Dean, will determine whether they <u>or</u> their administrative staff moves the case forward. *Department committees per se do not perform this function.* 

To get started, open the case. At the top right of the page is a "Send Case" dropdown box.	Send Case 🗸 Case Options 🗸
Select "Forward to"	Forward to Peer Level College of Social Select Status
	5

#### eFACULTY LECTURER EVALUATION REVIEWER TRAINING

An email interface opens. Email messaging is used (required in eFaculty) to notify the next level of review. Committee chairs and reviewers must enter a subject for the email to send. A "factory set" message appears in the body. While it may be edited, it also may be sent without edits. One may "uncheck" the "Send a message" statement to forward the case without a message. UP - FA will not need a message to take submissions. Please uncheck the box. If there is a unique issue to notify the next level of review about, it may be entered into the email message. Be mindful however, that all recipients will see the message.	<image/>
After entering the subject, click "Continue." The case will move after the confirmation is made. You're finished.	MESSAGE SENT × Your message was successfully sent.

#### MORE HELP

- For additional tutorials, visit <u>Help for Interfolio, Review, Promotion &</u> <u>Tenure</u>. **Note:** Interfolio tutorials may be slightly different compared to the eFaculty interface.
- For help, you can also contact UP-FA at <u>efaculty@sjsu.edu</u>.
- For Open Lab Hours, visit the <u>eFaculty Training Schedule</u>.
- For FAQs related to eFaculty Training, <u>eFaculty Training FAQ</u>.
- For general help, and solutions to problems, including QuickTips are at the <u>eFaculty Training and Help</u> web page.