

Moving Faculty Cases to College Level

Sharing Evaluations with Faculty and 10 Day Optional Response

*Scott Nguyen
Faculty Services
University Personnel*



Pg.3: Annual Due Date

Pg.4: Important Information & Deadlines

Pg.5: Cumulative Due Dates

Pg.6: Required Documents

Pg.7-9: Sharing Documents & Optional Response

Pg.10: **Template**: 10-Day Optional Response

Pg.11: **Template**: Moving Case to College Review

Pg 12: Contact Information + Open Lab Link



Annual/Cumulative Calendar

FEBRUARY			
Mon, Feb 3	Move Packets to Department Level Review		Department via eFaculty RPT
Fri, Feb 21	Submit Committee Evaluation if Chair is reviewing separately		Committee Chair via eFaculty
Wed, Feb 26	Submit Department Level Evaluations (1) Chair's, if reviewing separately, and (2) Committee's		Chair/Comm. Chair via eFaculty
Fri, Feb 28	Send Dept Level Evals to Faculty 10-Day Optional Response Period		Department Staff via eFaculty



2/21/25: Committee Review Due if Chair Submits Separate Review


- If the Dept. Chair plans to submit a separate review, the committee needs to submit their review by **Friday 2/21/25**, so the Chair can have access to the committee review.

2/26/25: Committee/Chair Submission

- *If the Chair is on the committee:* Submission date is 2/26/2025.
- *If the Chair is not leaving a separate review:* Submission date for committee is 2/26/2025.

2/28/25: Department sends 10-day Optional Response

- If a reviewer has not submitted their review or signed off on the confidentiality form, case should not be moved forward.



Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<input type="checkbox"/> Samantha Spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level Feb 26, 2025 ⚠ Required Documents			



Cumulative Due Dates

- *Reminder: Please make sure to create all **Cumulative Evaluation cases**. Faculty need time to submit documents.
- 2/15/24 - 3/17/25: Depts are assisting faculty with document uploads.
- Monday 3/17/25: Deadline for faculty to submit packet.
- Tuesday 3/18/25: Cases move to: “Step 2 of 4” Dept Review.

Annual/Cumulative Calendar

MARCH		
Mon, Mar 10	Optional Response to Department Due	
		All Cases Created Departments review materials to assist faculty with adhering to requirements
Tue, Mar 11	Move Packets to College Level	
		Populate with Concurrent Dep. Ann. Evals
Mon, Mar 17		Submit Cumulative Evaluation Packet <i>"Regenerate and Submit Packet"</i> <i>(Department locks all packets)</i>
Tue, Mar 18		Move Packets to Department Level Review



Please note:

- If you see “**Required Documents,**” the case is missing required forms.
- It could be the Review or the confidentiality form.
- Contact Faculty Services for assistance on verification of missing forms.

Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<input type="checkbox"/> Samantha Spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level Feb 26, 2025 ▲ Required Documents			
<input type="checkbox"/> sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level Feb 26, 2025			



To share documents:

- Click the checkbox next to the document you wish to share
- Click “Share” located in the blue bar
- Select “With Candidate”
- This should bring you to the next page

Internal Sections
These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

Department Assisted Document Upload [Edit] [Add File]

Department Committee [Edit] [Add File]

Materials

Title	Details	Actions
<input checked="" type="checkbox"/> Annual Evaluation Review by Scott Nguyen	Added by Scott Nguyen Jan 27, 2025	Edit

Department Chair [Edit] [Add File]

Materials

Title	Details	Actions
<input type="checkbox"/> Annual Evaluation Review by Scott Nguyen	Added by Scott Nguyen Jan 27, 2025	Edit



- Copy and paste text into the Subject and Message fields
- Check “Enable” in the “File Response” field to allow faculty to reply.
- **Deadline: 3/10/25**
- Section for Response:
 - Department Chair: Select if Chair evaluated separately
 - Department Committee: Select if the Chair did not review separately.

Message to Candidate

To
sammy spartan (sammy.spartan@sjsu.edu)

Subject *
10 Day Optional Response - Cumulative Evaluation

Message *

Dear Faculty Member:
The Department level review of your Annual Evaluation has concluded, and all evaluations are attached. You shall have 10 days to provide an optional response, due by Monday, March 10, 2025. Pursuant to Provision 15.5 of the CSU-CFA Collective Bargaining Agreement, responses may not add new items to the dossier. Responses that include new information or new evidence will be removed from the dossier by Faculty Services and will not be seen by reviewers. Optional Responses shall be limited to a statement. Typically, issues such the following are addressed:
Explanation of your disagreement with evaluations

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

Annual Evaluation Review by Scott Nguyen

Details

Direct email reply:
scott.nguyen01@sjsu.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
10-Day Optional Response

Deadline 📅
Mar 10, 2025

Section for Response *
-- Select Section --
-- Select Section --
Candidate Packet
Other Documents (Optional)
Internal Sections
Department Assisted Document Upload
Department Committee
Department Chair



- Once the 10-Day Optional Response has been shared, move the case forward to the College Review Step.
- Cases will be moved:
 - From “Step 2 of 4” - Dept. Review
 - To “Step 3 of 4” - College Review
- Please use the provided template Pg.10

The screenshot shows the 'sammy spartan' case page. At the top, there is a breadcrumb trail: 'San José State University > Cases >'. The case title 'sammy spartan' is prominently displayed. Below the title, the 'Unit' is 'Accounting & Finance' and the 'Template' is 'Annual Evaluation (Committee) - College of Business and Administration - Accounting and Finance'. A 'Send Case' button is visible, with a dropdown menu open showing options: 'Forward to Dean or Appropriate Administrator', 'Backwards to Department Assistance', and 'Department Assistance'. There are also 'Case Options' and 'Read Case' buttons. At the bottom, there are controls for 'Expand All', 'Collapse All', 'Share', 'Settings', and 'Move'.

The 'Send Case Forward' dialog box is shown. It contains the following text: 'Great job! You're sending the case forward to the next step, Dean or Appropriate Administrator. The following reviewers will lose access to the case:'. Below this, there are two input fields for reviewers to be removed: 'Ch/Dir - Accounting & Finance - Chair (1 members)' and 'Annual & Cumulative - Department Committee - Business - Accounting and Finance (4 members)'. The next section states: 'The following reviewers will gain access to the case:'. Below this, there is one input field for reviewers to be added: 'Annual & Cumulative - MPP - College of Business (5 members)'. There is a checked checkbox for 'Send a message to the reviewers gaining access.' with a note: 'If recipients respond to this message, their response will come directly to your email inbox.' There are fields for 'Subject *' and 'Message *'. At the bottom, there are 'Preview', 'Continue', and 'Cancel' buttons.



Dear Faculty Member:

The Department level review of your Annual Evaluation has concluded, and all evaluations are attached. You shall have 10 days to provide an optional response, due by **Monday, March 10, 2025.**

Pursuant to Provision 15.5 of the CSU-CFA Collective Bargaining Agreement, responses may *not* add new items to the dossier. Responses that include new information or new evidence *will be removed from the dossier* by Faculty Services and will not be seen by reviewers.

Optional Responses shall be limited to a statement. Typically, issues such the following are addressed:

- Explanation of your disagreement with evaluations
- Correcting errors
- Pointing out evidence in the dossier that was overlooked by reviewers

While your statement will center on evaluations from the college level of review, your intended audience shall be those at the next level of review who will receive the dossier next.

Please note that the link above will not work for sign on unless you are already signed in to your eFaculty account--visit [one.SJSU.edu](https://one.sjsu.edu). Please see this help guide for submitting a response:
<https://product-help.interfolio.com/candidate/view-and-respond-to-files-shared-with-you-by-a-committee-rebuttal>.

Please let us know if you need further assistance (eFaculty@sjsu.edu).



Dear Dean/Appropriate Administrator:

This evaluation is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in. For help initiating your review, please visit our [reviewers guide](#), our [eFaculty Training and Help](#) page, or the help pages under your name in the extreme upper right corner of your eFaculty account. If the wrong faculty member is designated chair, they may assign manager duties to the properly elected chair.



For questions or 1 on 1 assistance, please contact:

eFaculty@sjsu.edu

scott.nguyen01@sjsu.edu

[Open Lab Schedule](#)

