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CONFIDENTIALITY GUIDELINES

Administrative assignment to eFaculty grants access to confidential faculty information. It is easy for staff to find themselves in violation of policies and procedures when attempting to assist faculty or others with seemingly innocuous requests. Please take time to review the following caveats about proper handling and decision making when managing cases to protect faculty confidentiality and avoid embarrassing errors.

- Use the authorized access to information only in the performance of the responsibilities as a staff member.
- Avoid disclosure of information to unauthorized persons except as permitted under applicable University policy and/or Federal or State law.
- The obligation to avoid such disclosure will continue even if and after I leave the employment of San José State University.
- Exercise care to protect information against accidental or unauthorized access, modifications, disclosures, or destruction.
- Keep conversations about your work in eFaculty private and not overheard by others who are not authorized to have access to such information.
- Promptly report to the appropriate administrator any unauthorized access to files in eFaculty.
- Access is granted only for managing faculty evaluations requiring your participation (as assigned by the appropriate administrator).
- Exploration or manipulation of files in other review processes violates University confidentiality rules and may be a violation of privacy laws.
- Staff duties in eFaculty are specified by guidance issued by University Personnel - Faculty Affairs. Activities outside of those duties, including faculty requests for assistance, must be approved by UP - FA.
- Any violation of these statements or other University policies related to the appropriate release or disclosure of information may result in one or more sanctions including immediate termination of access to that information, removal from one's current position, and/or disciplinary action as deemed appropriate by the appropriate administrator.

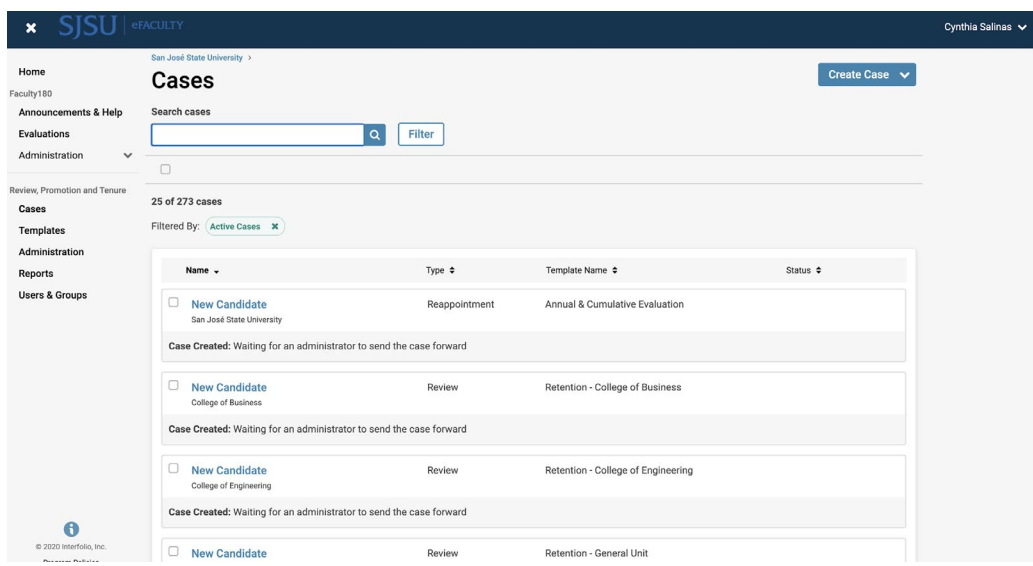
This help guide is for administrators for the eFaculty system. It explains the setup and management of cases using eFaculty. University Personnel Faculty Affairs (UP-FA) has named the system for faculty evaluations “eFaculty,” its vendor, however, is Interfolio. For more information on using eFaculty, please visit the [eFaculty](#) webpage on the SJSU University Personnel website.

Additional Help Resources:

- Interfolio’s Online Help Center at <http://product-help.interfolio.com/>
- Interfolio Support Lines:
 - Phone: (877) 997-8807
 - Hours: Mon-Fri, 9 AM-6 PM Eastern Time
 - E-Mail: help@interfolio.com
- University Personnel Faculty Affairs (UP-FA)
 - Email: efaculty@sjsu.edu

WHAT IS eFACULTY?

eFaculty allows faculty to organize a digital portfolio that can be passed through a structured review process. We use eFaculty to help faculty efficiently upload and gather essential materials without collecting them manually. eFaculty helps reviewers collaborate on faculty materials online while adhering to institutional guidelines. eFaculty’s functions include:



• **Accepting and storing file uploads and case materials from candidates,** and displaying them in an organized manner

• **Establishing review processes with levels and reviewer assignments,** recommendations are recorded and distributed along the way

• **Storing digital copies**

of reviews for the faculty and other individuals to view it.

• **Facilitating communication** between Temporary Faculty, reviewers, and department and college Administrators.

KEY TERMS TO KNOW

- **Interfolio:** Vendor for eFaculty. Interfolio is a secure online solution to help higher education with faculty evaluation workflow and selection processes. 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 with yearly contracts. Cumulative Evaluations are required for initial and renewal, three-year appointments, and are conducted during the Spring Semester. Annual and Cumulative Evaluations are processed within eFaculty. For more information, visit the [Periodic Evaluations-Lecturers Instructions](#) and the [Periodic Evaluations-Lecturers Calendar](#).
- **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 users and standing committees. Follow this guide thoroughly on how to perform tasks as a eFaculty Administrator. **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 Faculty180

- **Dossier:** Pronounced "dāsē,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:
 - 1) Faculty Documents - any documentation that the temporary faculty adds for review
 - 2) Committee Documents - any documentation that a eFaculty administrator adds for only committee members to view
 - 3) Forms - created within Interfolio to collect specific information from faculty or committee members
- **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 [Glossary of Terms](#).

eFACULTY ADMINISTRATOR'S ROLE & TASKS

The eFaculty Administrator creates cases for Annual and Cumulative Evaluations for temporary faculty appointed in their unit or division, uploads documents for reviewers as needed, and manages cases throughout the review process. Access is given per department level. University Personnel-Faculty Affairs has the same access, but for all SJSU Departments. An eFaculty Administrator's tasks include, but are not limited to:

1. Create individual cases
2. Add committee members
3. Notify the faculty and committee members
4. Upload any documentation
5. Assist temporary faculty, committee members, and other eFaculty Administrators as needed. (Note: Responsibility for uploading to eFaculty materials to be reviewed lies solely with the faculty member.)

CASE WORKFLOW

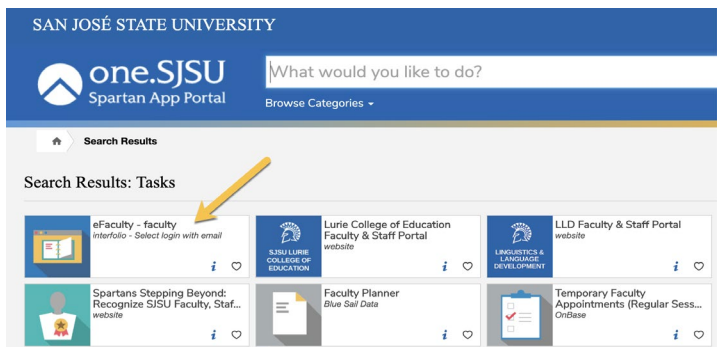
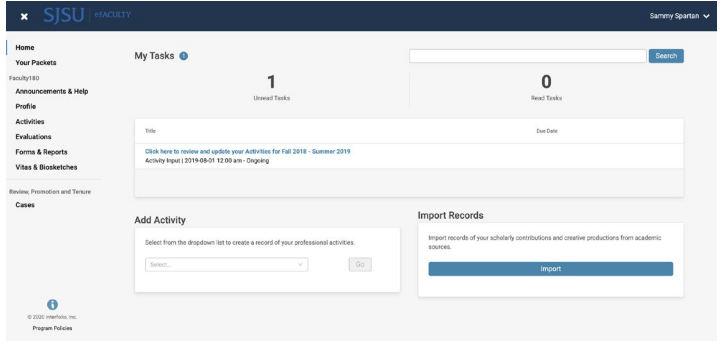
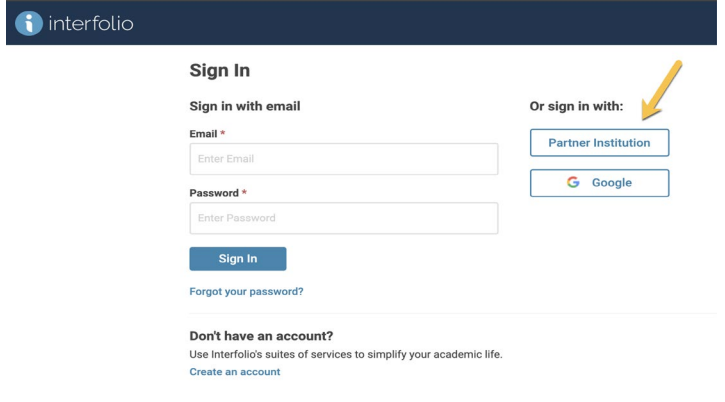
- **Step 1:** The eFaculty Administrator uses the appropriate template to create cases for each temporary faculty member.
 - If there is no eFaculty Admin assigned for a department, then the College Admin will create the cases.
- **Step 2:** When the case is complete, the eFaculty Administrator will notify the temporary faculty member. Notifying the candidate:
 - Allows the Administrator to view the faculty member's files (at least those uploaded for the period of review).
 - Establishes a communication link with the faculty member for the duration of the review.

Note: When the temporary faculty member has submitted their packet, the eFaculty Administrator may view it. If things are missing, the Administrator may communicate the omission to the faculty member and may unlock the packet to allow revisions.
- **Step 3:** When the files are complete, or if time runs out, the Administrator will forward the case to the first level of review. The committee members must forward

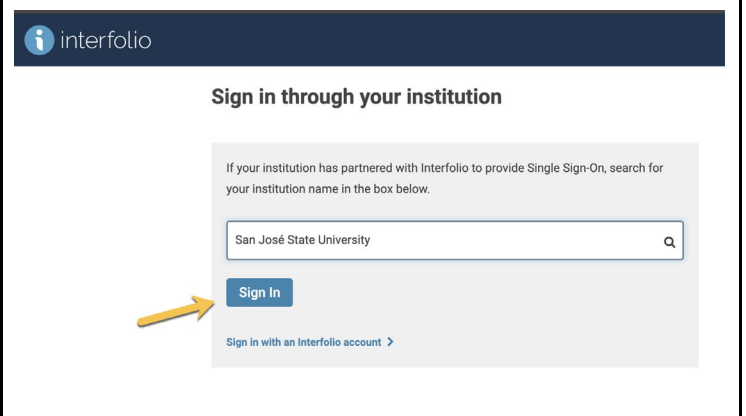
the case to the next reviewer. **Note:** The eFaculty Administrator may forward the case if the reviewer does not forward the case.

- **Step 4:** Once the committee members have reviewed the case, the case can be forwarded to the dean to review
- **Step 5:** The case is closed when the faculty members are notified of the case’s decision. The case will be stored in the system and can be retrieved by Administrators. UP-FA will “close” the case.

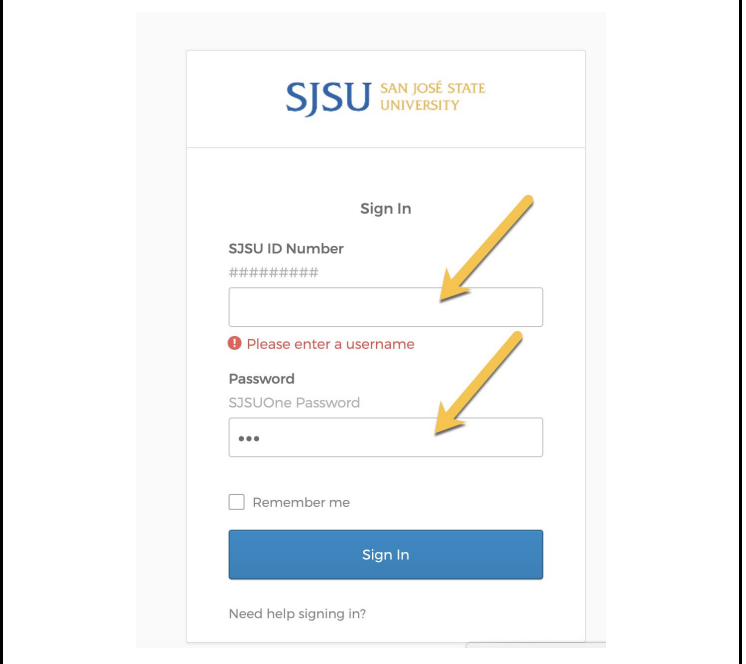
LOGGING IN

<p>1. Log in through https://one.sjsu.edu/ and search for “eFaculty”</p>	 <p>The screenshot shows the 'SAN JOSÉ STATE UNIVERSITY' header with the 'one.SJSU Spartan App Portal' logo. A search bar contains the text 'What would you like to do?'. Below the search bar, the results are categorized under 'Search Results: Tasks'. A yellow arrow points to the first result, 'eFaculty - faculty Interfolio - Select login with email', which includes an information icon and a heart icon.</p>
<p>2. 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.</p>	 <p>The screenshot shows the 'SJSU eFACULTY' homepage. The user is logged in as 'Sammy Sparta'. The main section is 'My Tasks', showing '1 Unread Tasks' and '0 Read Tasks'. Below this, there are sections for 'Add Activity' and 'Import Records'. The 'Add Activity' section has a dropdown menu and a 'Go' button. The 'Import Records' section has an 'Import' button.</p>
<p>3. More problematic is logging in from https://home.interfolio.com/ If there, select “Partner Institution,” and find SJSU. Do not select “Google,” “Forgot your password?” or “Create an account.” These options are not secured, and lead to errors. It is best to enter via one.sjsu.edu.</p>	 <p>The screenshot shows the 'interfolio' sign-in page. It has a 'Sign In' section with fields for 'Email' and 'Password', and a 'Sign In' button. To the right, there is a section 'Or sign in with:' with buttons for 'Partner Institution' and 'Google'. A yellow arrow points to the 'Partner Institution' button. Below the sign-in section, there are links for 'Forgot your password?' and 'Don't have an account? Use Interfolio's suites of services to simplify your academic life. Create an account'.</p>

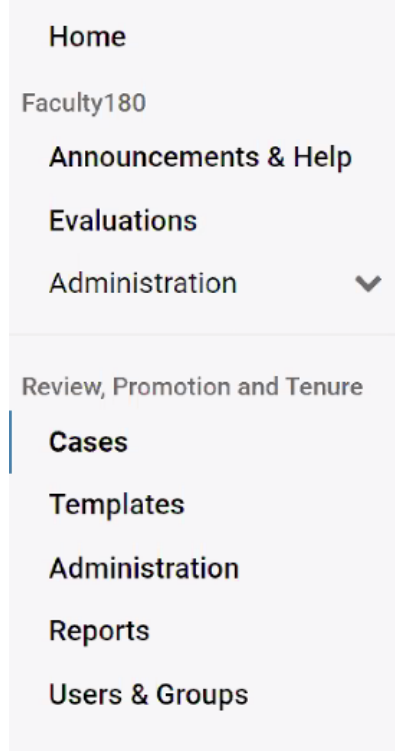
4. If using Interfolio's login feature, search for "San José State University" (with the accent) and select "Sign In."



5. Enter your SJSU Credentials
6. Complete with Duo 2-Factor Authentication



7. You will be directed to eFaculty’s homepage, and you will see “My Tasks.” There should be **two sections**: Faculty180 and Review, Promotion, and Tenure.



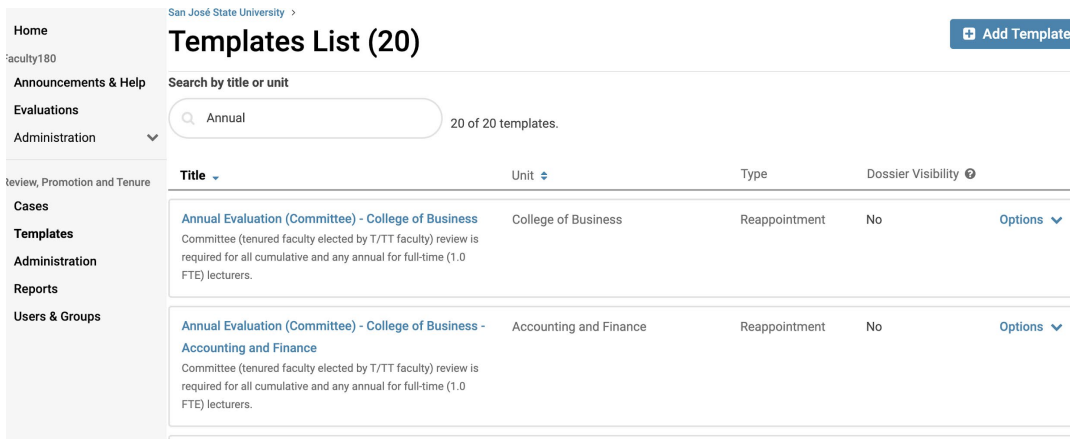
TEMPLATES

Divisions housing regular session temporary faculty appointments will create “cases” for review using templates for the review types (e.g., annual or cumulative). (Discuss with UP - FA if planning to evaluate faculty in special sessions appointments.) Colleges may decide to centralize the case creation process, but we expect department staff will create most cases.

Department Level

The faculty collective bargaining agreement requires peer committee evaluations for: 1) All full-time (AY 1.0 FTE time base) lecturer and librarian temporary faculty, and 2) All cumulative evaluations. Departments are allowed to always use a peer committee. However, the CBA only requires chair/director review for part-time (AY less than 1.0 FTE time base) faculty in annual evaluations. Each department chooses templates accordingly.

Each department will have three (3) template options to choose from when creating cases for review:



1) **Annual Evaluation (Committee)** - Use this template if a committee will be assigned to the case

2) **Annual Evaluation (No Committee)** - Use this template if no committee will be assigned to the case

3) **Cumulative Evaluation** - Use this template for all Cumulative Evaluations. All Cumulative Evaluations must have committees.

When creating cases, choose the appropriate template bearing the name of the appointing department. The naming convention: "Review Type - College - Department name."

College Level

For Temporary Faculty reviewed at the College level (for appointment in the college, not a department), use the following three (3) options:

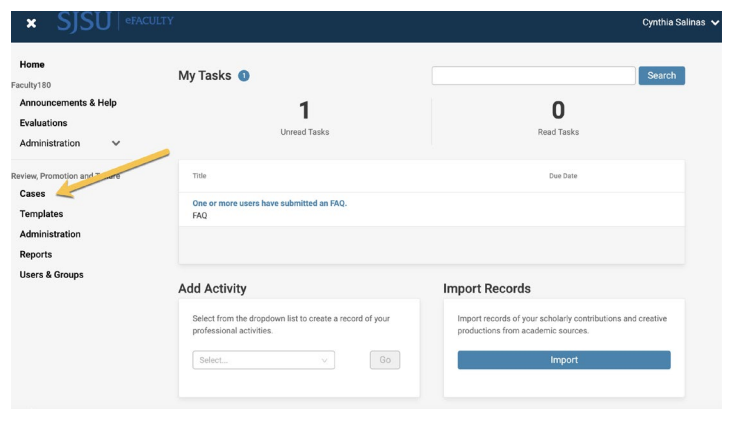
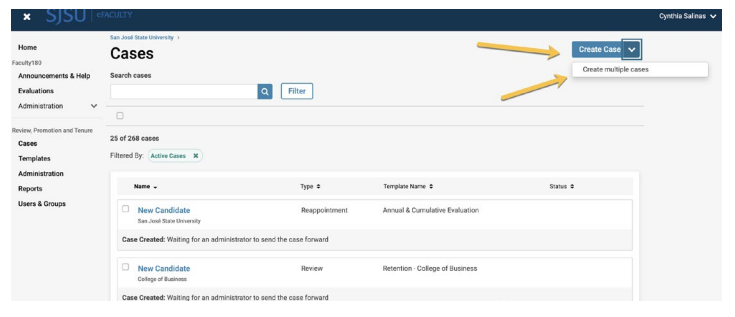
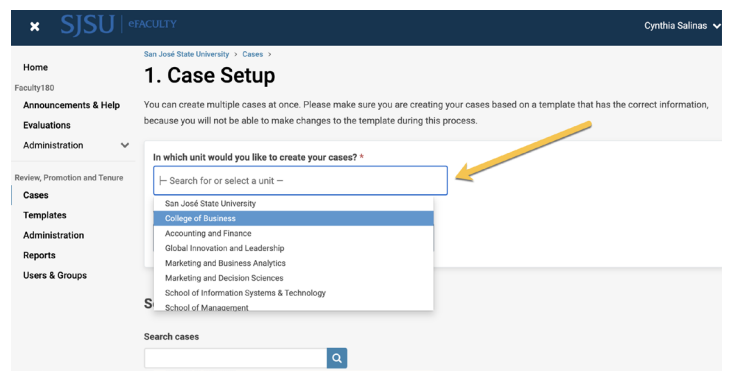
- 1) **Annual Evaluation (Committee) - (Your College)**: Use this template if a committee will be assigned to the case
- 2) **Annual Evaluation (No Committee) - (Your College)**: Use this template if no committee will be assigned to the case
- 3) **Cumulative Evaluation (Your College)**: Use this template for all Cumulative Evaluations. All Cumulative Evaluations must have committees.

As a eFaculty Administrator, you will be able to see all department, college, and SJSU-wide templates. Use the search bar to search for your department's templates.

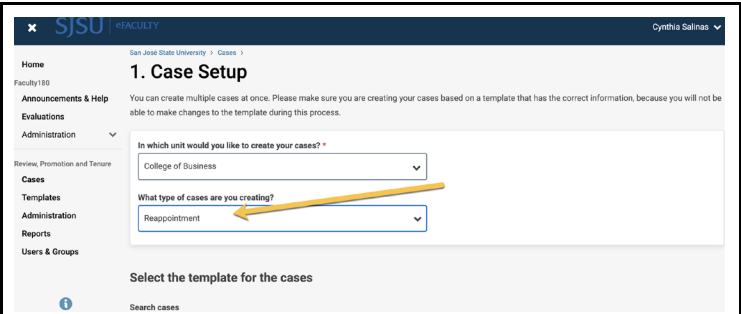
Note: Please contact UP-FA directly (efaculty@sjsu.edu) if your college/department's three options are not listed.

CREATE MULTIPLE CASES

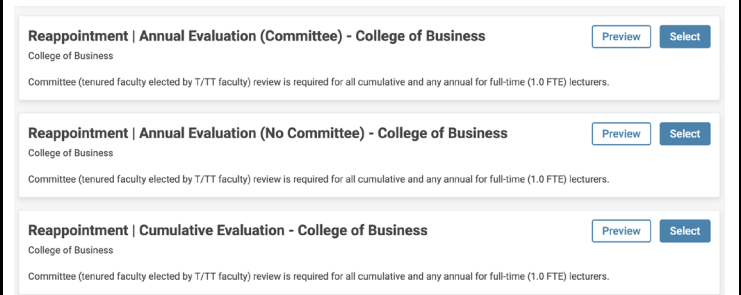
Cases may be created individually (explained later), but it will be more efficient to create cases in bulk. Follow these instructions to do so:

<p>1. On the left-hand side, select "Cases." (A view of the current case list for your unit or division will appear. This is where one goes to find individual cases in process.)</p>	 <p>The screenshot shows the eFACULTY dashboard. On the left-hand navigation menu, the 'Cases' option is highlighted with a yellow arrow. The main content area shows 'My Tasks' with 1 unread task and 0 read tasks. Below this, there are sections for 'Add Activity' and 'Import Records'.</p>
<p>2. At the top right, select "Create Multiple Cases" to begin to create multiple cases</p>	 <p>The screenshot shows the 'Cases' page. At the top right, there are two buttons: 'Create Case' and 'Create multiple cases'. Both buttons are highlighted with yellow arrows. Below the buttons is a search bar and a table of cases.</p>
<p>3. For Step #1: Case Setup, select the department (or college) with which you are associated. All SJSU departments should have templates. If your department is not listed, please contact UP-FA directly at efaculty@sjsu.edu.</p>	 <p>The screenshot shows the '1. Case Setup' page. A dropdown menu is open, showing a list of units to select from. A yellow arrow points to the dropdown menu. The units listed include San José State University, College of Business, Accounting and Finance, Global Innovation and Leadership, Marketing and Business Analytics, Marketing and Decision Sciences, School of Information Systems & Technology, and School of Management.</p>

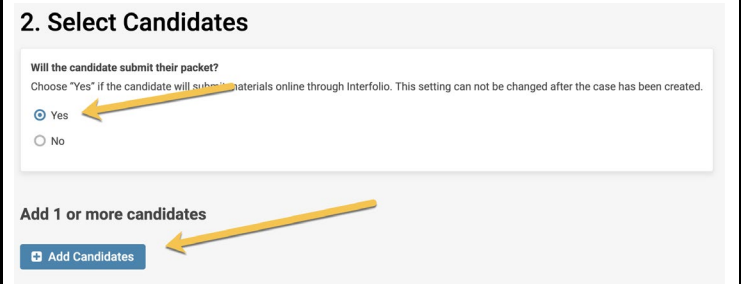
4. The eFaculty "type" for Annual and Cumulative will be "Reappointment." Select "Reappointment." Scroll down and select "Continue" to move to Step #2.



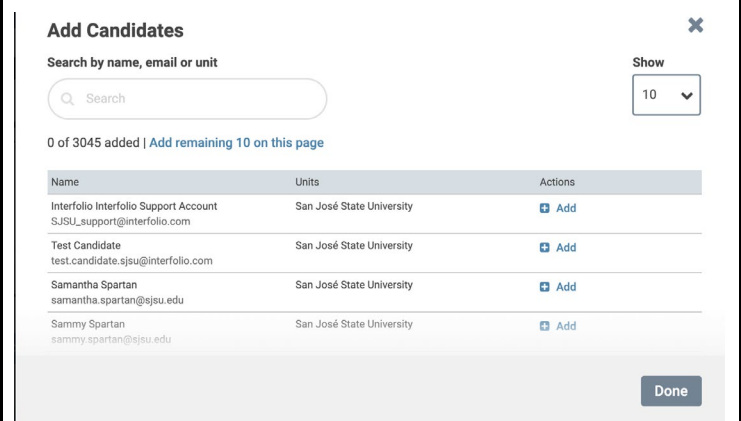
5. Select the appropriate template associated with the college or department. Either Annual Evaluation (Committee), Annual Evaluation (No Committee), or Cumulative Evaluation. Select "Continue" to move to the next step.

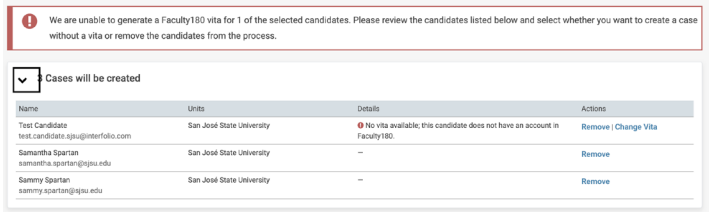
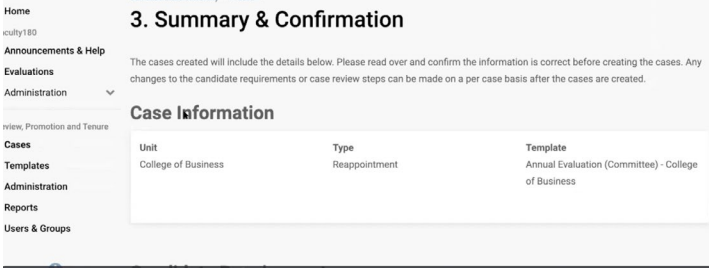
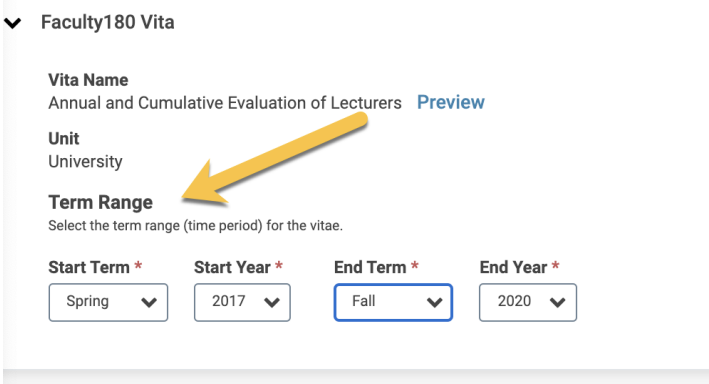


6. For Step #2: Select Candidates, select "Yes," so the candidate can submit materials online through Interfolio. Select "Add Candidates" to add the temporary faculty to be reviewed.

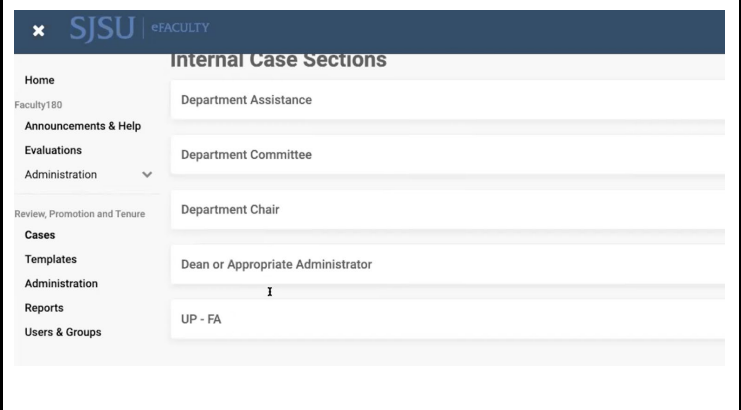


7. Select the candidates by using the Search Bar. Select "+Add" to add each candidate. The candidates' names will be the candidate's official name, and it is associated with their SJSU email. After the candidates have been added, select "Done" to return back to Step #2. Then select "Continue" to move to the next step. **Tip:** Try first if last name doesn't work in search. If not found at all, contact efaculty@sjsu.edu. Be prepared to submit all faculty in your unit not found prior to emailing.

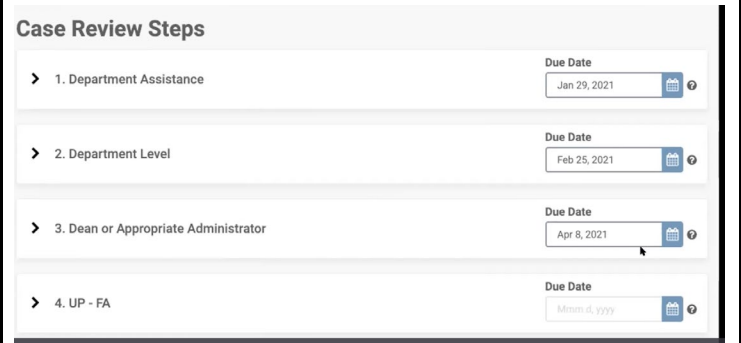


<p>8. An error may appear, indicating that eFaculty cannot generate a Faculty180 Vitae for the faculty member. You will not be able to continue creating multiple cases if this error occurs. Contact UP-FA efaculty@sjsu.edu to solve the issue. You can remove the names that are associated with this error and create those cases later.</p>	
<p>9. The next step is Step #3: Summary & Confirmation. Note: In some cases, the viewer will automatically go to the bottom of the page; if this is the case, scroll to the top of the page to see the title.</p>	
<p>10. Under "Candidate Requirements", in the "Faculty180 Vitae" section, select the Term Range (time period) for the evaluation.</p>	
<p>11. Dates for Annual Evaluation conducted in AY 20-21.</p>	<p>Spring 2020 - Fall 2020</p>
<p>12. Dates for Cumulative Evaluation in AY 20-21 for six-year faculty up for initial 3-year appointment.</p>	<p>6 years Fall 2015 - Spring 2021</p>
<p>13. Dates for Cumulative Evaluation in AY 20-21 for "entitled" faculty up for renewal 3-year appointment.</p>	<p>3 years Fall 2018 - Spring 2021</p>

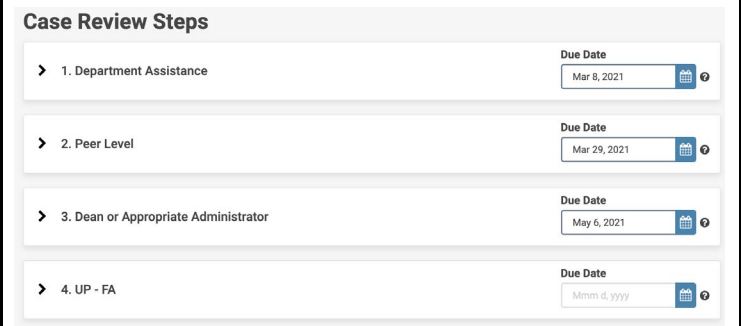
14. Internal Case Sections refer to the steps a case will follow, and where materials (e.g., recommendations) will be uploaded. **NOTE:** The first step is for the department admin who normally assists the chair with annual and cumulative evaluations, to preview case materials upon faculty submission of their packet.



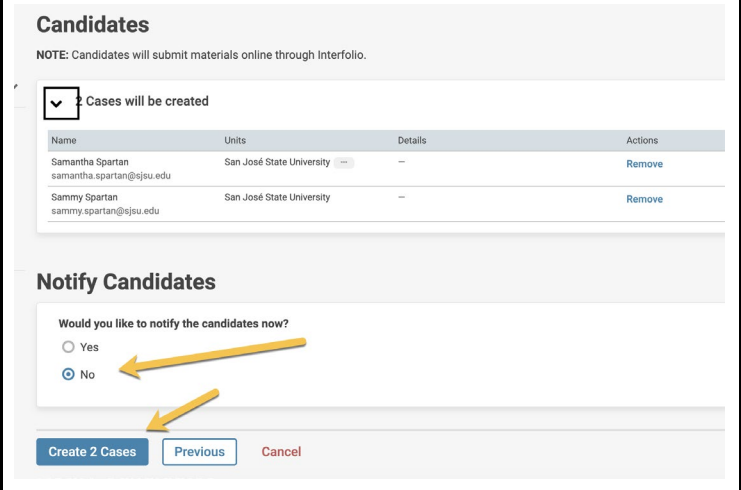
15. Case Review Steps show the due dates for each step. The dates reflect the official schedule and are pre-set for all templates. Please do not change those dates without consulting with UP - FA. This example shows the dates for Annual Evaluations.

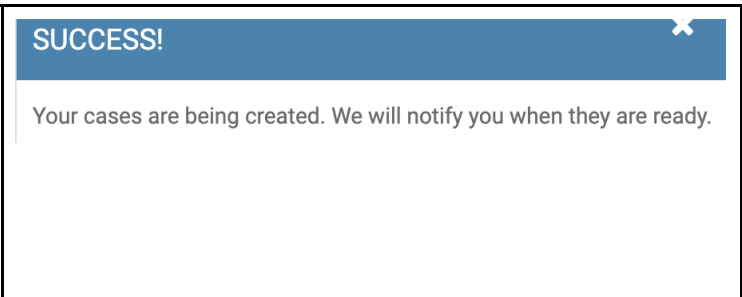
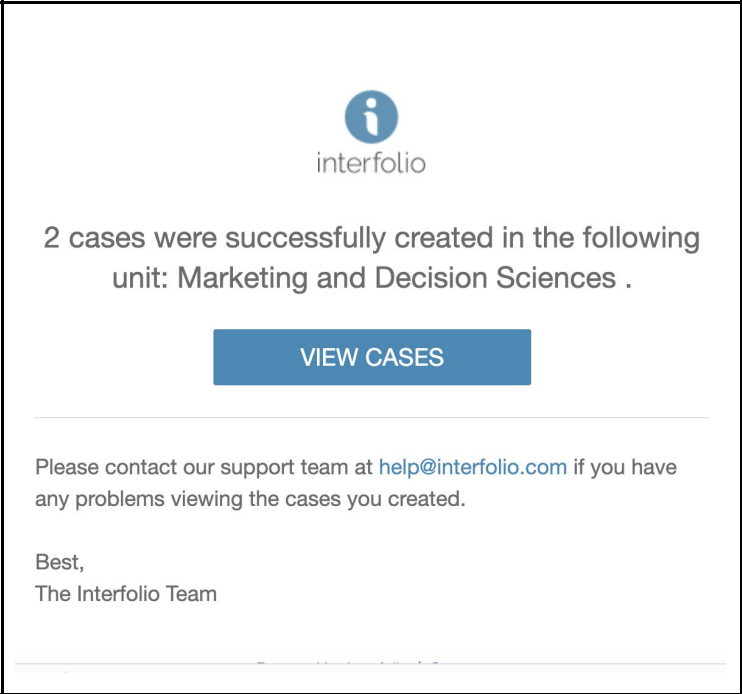
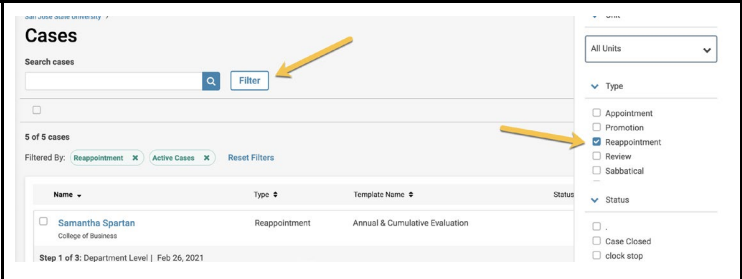
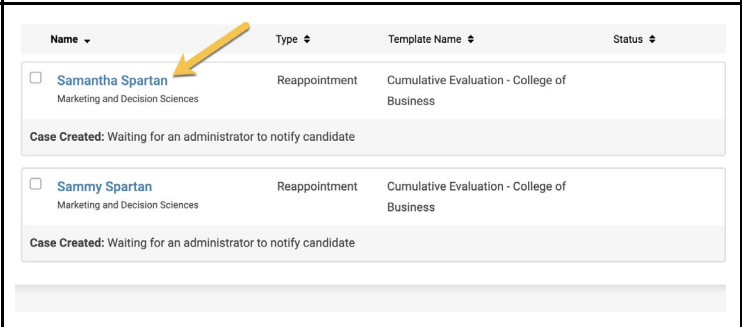


16. This example shows the dates for Cumulative Evaluations.

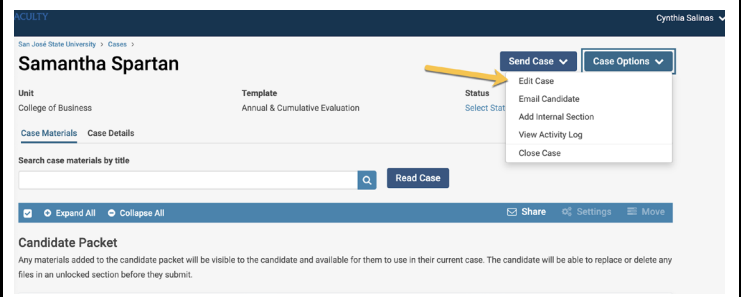


17. Next, you'll see the cases that you'll be creating. Since you'll be working on the cases, it's best NOT to contact the temporary faculty at this time. Select **"No,"** so the candidate is not notified. Candidates will be notified once the eFaculty Administrator completes the case. Select "Create # Cases" to move to the next step. In this example, the button is titled "Create 2 Cases" since two cases are being created.

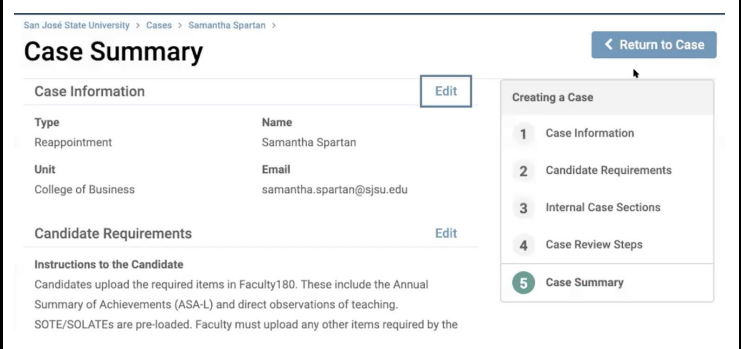


<p>18. A message will pop up on the next window, indicating that the cases have been created. You will also receive an email with a URL link.</p>	
<p>19. Look in your SJSU Inbox for a message from Interfolio. You should receive a similar email as indicated on the right. If you select the URL link provided on the email, the cases will appear. Note: You must be logged in to your one.sjsu.edu account for the link to work.</p>	
<p>20. Another way to locate the cases is by using the search bar. Select "Filter," and then select "Reappointment" to search for the candidates. You can also search the name of the candidate.</p>	
<p>21. EDIT A CASE To edit a case, select the hyperlinked name of the candidate.</p>	

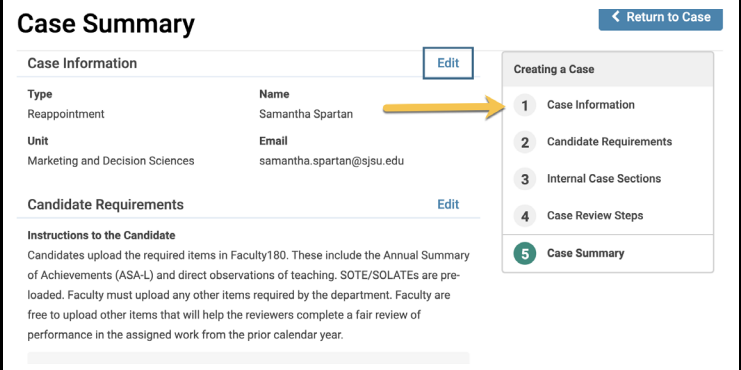
22. Under "Case Options", select "Edit Case." Each case needs to be set up individually, so each candidate's name needs to be chosen separately and set up.



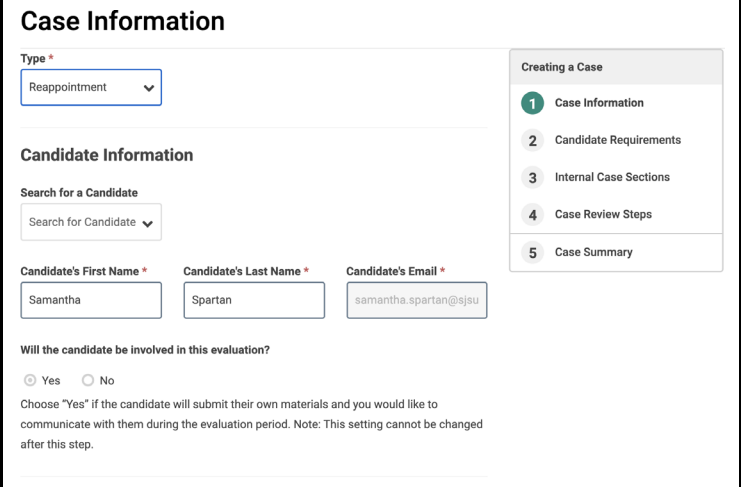
23. Once "Edit Case" is selected, you'll be taken to the "Case Summary."

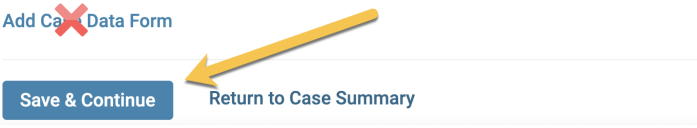



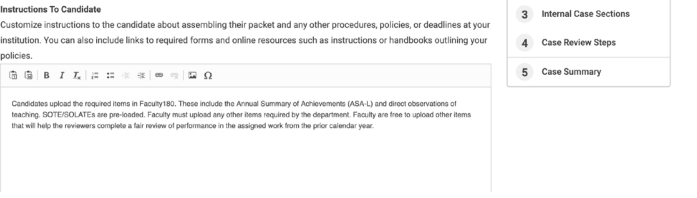



24. You'll want to edit the case from the beginning, so select #1: "Case Information."



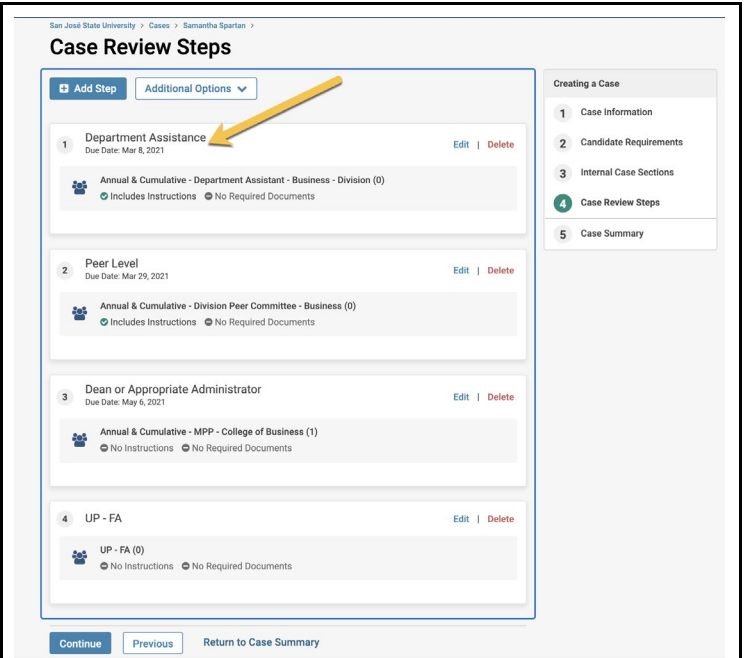
25. The Type for Annual and Cumulative Evaluations should always be "Reappointment,". Verify the First Name, Last Name, and SJSU Email. This information should be automatically populated since you've started the case. The question "Will the candidate be involved in this evaluation?" should be automatically set as "Yes."



<p>26. "Case Data Forms" will not be required, so select "Save & Continue."</p>	<p>Case Data Forms</p> <p>Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the Administration page.</p> <p>Add Case Data Form</p> <p></p>						
<p>27. Step #2 is "Candidate Requirements." For the Candidates Packet Due Date, select "Jan 29, 2021" for Annual Evaluations and select "March 8, 2021" for Cumulative Evaluations. Visit the Periodic Evaluation Calendar for additional evaluation dates during the year. After you have entered a date, select "Save." A window on the left lower corner of your screen will pop up, indicating "DATA SAVED - Your data was saved successfully."</p>	<p>Candidate Requirements</p> <p>Candidate's Packet Due</p> <p>Jan 29, 2021 </p> <p>Save </p> <p>DATA SAVED </p> <p>Your data was saved successfully.</p>						
<p>28. The "Instructions To Candidate" are set by UP-FA, so please do not edit the instructions.</p>	<p>Instructions To Candidate</p> <p>Customize instructions to the candidate about assembling their packet and any other procedures, policies, or deadlines at your institution. You can also include links to required forms and online resources such as instructions or handbooks outlining your policies.</p> <p></p> <table border="1"> <tr> <td>3</td> <td>Internal Case Sections</td> </tr> <tr> <td>4</td> <td>Case Review Steps</td> </tr> <tr> <td>5</td> <td>Case Summary</td> </tr> </table>	3	Internal Case Sections	4	Case Review Steps	5	Case Summary
3	Internal Case Sections						
4	Case Review Steps						
5	Case Summary						
<p>29. Under "Faculty180 Vita," the Term Range of what you selected previously should appear. You may change it if you need to correct the date.</p>	<p>Faculty180 Vita</p> <p>Vita Name Annual and Cumulative Evaluation of Lecturers Preview</p> <p>Unit University</p> <p>Term Range The term range (time period) for the vita. Spring 2020 - Fall 2020</p> <p>Change Remove</p>						

<p>30. "The Packet Requirements" are not used in temporary faculty evaluations, so select "Continue" to move to the next step.</p>	<p>Packet Requirements + Add Section</p> <p>Create packet sections for materials you would like to receive from a candidate. Each section can contain a due date, a description, and requirements for particular materials (e.g., CV, teaching statement, syllabi).</p> <p>To begin adding packet requirements, add at least one section.</p> <hr/> <p><input type="checkbox"/> Allow candidates to add their own sections to the packet.</p> <hr/> <p>Continue Previous Return to Case Summary</p>
<p>31. For Step #3, leave the "Settings" as is - "Below the candidate packet."</p>	<p>Internal Case Sections</p> <p>Create sections to help committee members or individual users organize the materials they add as part of the review. The sections you create here will not be visible to the candidate. You can set up specific requirements for the reviewers of the case in the Case Review Steps. For Examples or more guidance, see Required Documents for Review Steps.</p> <p>Settings</p> <p>Internal case sections will appear:</p> <p><input type="radio"/> Above the candidate packet</p> <p><input checked="" type="radio"/> Below the candidate packet </p> <p>Sections</p>
<p>32. You will then see the different types of "Sections." These sections refer to the different types of reviewers who will be reviewing the case. These serve as headers to organize the documents generated during the review. UP-FA sets these sections. Select "Continue" to move to the next step.</p>	<p>Department Assistance Edit Remove</p> <p>In this step, the department may assist the faculty member with proper assembly of all required items.</p> <hr/> <p>Department Committee in use Edit Remove</p> <hr/> <p>Department Chair in use Edit Remove</p> <hr/> <p>Dean or Appropriate Administrator in use Edit Remove</p> <hr/> <p>UP - FA Edit Remove</p> <hr/> <p>+ Add Section Add External Evaluations Section</p>

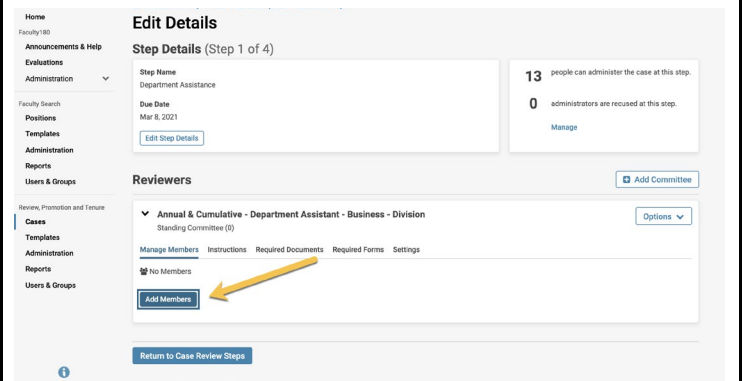
33. Step #4 is Case Review Steps. These sections refer to the different types of reviewers who will be reviewing the case. Under "Department Assistance," select "Edit." The "Department Assistant(s)" will be an individual(s) who will be checking the case before sending it to the reviewers. The person assigned should check that all materials are appropriately loaded and communicate with the temporary faculty if any materials are missing.



ADD COMMITTEE MEMBERS

To add members ad hoc, follow 34 - 35. To add via "standing committee," recommended, see 38 - 40.

34. Select "Add Members"



35. Search for the individual's name and select "+Add". Select "Close" to go back to the page.



36. Next, select "Return to Case Review Steps"

Reviewers

▼ Annual & Cumulative - Department Assistant - Business - Division
Standing Committee (1)

Manage Members Instructions Required Documents Required Forms Settings

1 Member

CS Cynthia Salinas Temporary
cynthia.salinas@sjsu.edu

Add Members

Return to Case Review Steps

37. Select the next reviewer section associated with the case.

1 Department Assistance
Due Date: Mar 8, 2021

2 Peer Level
Due Date: Mar 29, 2021

3 Dean or Appropriate Administrator
Due Date: May 6, 2021

4 UP - FA

1 Case Information
2 Candidate Requirements
3 Internal Case Sections
4 Case Review Steps
5 Case Summary

38. When entering committee members as a group, go to "Review, Promotion, and Tenure," in the sidebar and select "Users & Groups."

Faculty180
Announcements & Help
Profile
Activities
Evaluations
Forms & Reports
Vitas & Biosketches
Administration

Faculty Search
Positions
Templates
Administration
Reports
Users & Groups

Review, Promotion and Tenure
Cases
Templates
Administration
Reports
Users & Groups

Edit Details
Step Details (Step 1 of 4)

Step Name
Department Assistance

Due Date
Mar 8, 2021

Reviewers

▼ Annual & Cumulative - Department Assistant - Science - Chemistry
Standing Committee (0)

Manage Members Instructions Required Documents Required Forms Settings

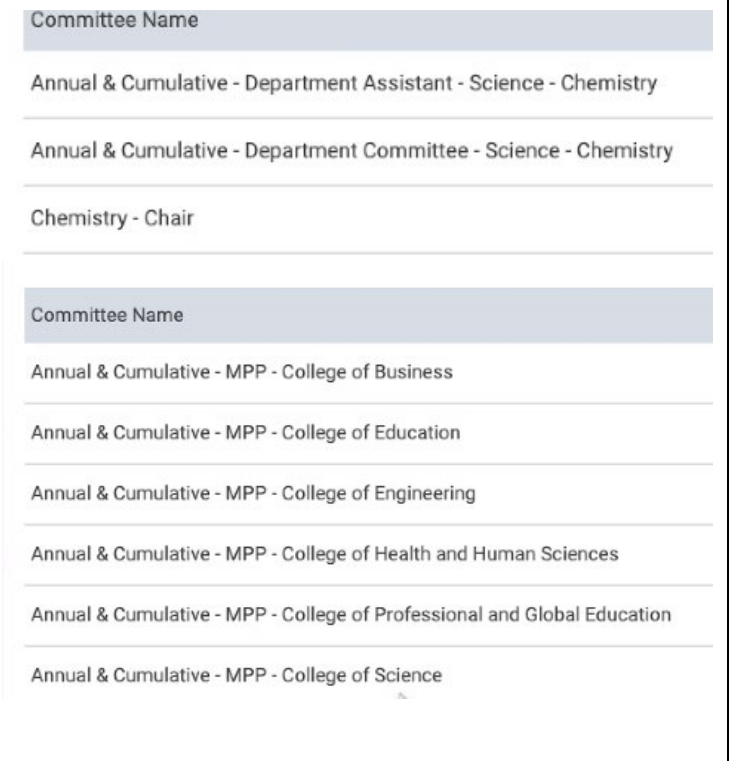
No Members

Return to Case Review Steps

39. Under the "Committees" section, type "**Annual & Cumulative - Department Assistant** - (your college) - (your department)." Then select the pencil icon to edit the committee.



- Note:** In every evaluation, there will be 3 or 4 committees: 1) department assistant, 2.) department committee, 3.) department chair, and 4.) department MPP. There will be no department committee for Annual Evaluation with no committee. The committee convention are as follows:
- **Department Assistant:** "Annual & Cumulative - Department Assistant - (your college) - (your department)"
 - **Department Committee:** "Annual & Cumulative - Department Committee - (your college) - (your department)"
 - **Chair:** "(your college) - Chair"
 - **MPP** (An appropriate Administrator): "Annual & Cumulative - MPP - (your college)"



40. The "Edit Committee" will pop up. Search for the "Committee Members" and add them to the committee. Suppose you cannot find an individual. You can add them as a user. Please refer to the end of this guide on how to add users. The number of committee Members should show up.

Edit Committee

This committee is associated with active cases and may not be deleted at this time.

Name *
Annual & Cumulative - Department Assistant - Business - Division

Unit
College of Business

0 Committee Members

Search Users Sort By Name ▾

First Name	Last Name	Email	
Lee	Aarons	lee.aarons@sjsu.edu	+ Add
Deborah	Abbott	deborah.abbott@sjsu.edu	+ Add
Charley	Abboud	charley.abboud@sjsu.edu	+ Add
Richard	Abend	richard.abend@sjsu.edu	+ Add

41. To go back to the case, select "Cases" under Review, Promotion and Tenure. Search for the case.

Review, Promotion and Tenure

- Cases
- Templates
- Administration
- Reports
- Users & Groups

42. Under "Case Options", select "Edit Case"

San José State University > Cases > Samantha Spartan

Unit: Marketing and Decision Sciences
Template: Cumulative Evaluation - College of Business

Case Materials Case Details

Search case materials by title Read Case

Expand All Collapse All Share Settings Move

Candidate Packet

Send Case Case Options

- Edit Case
- Email Candidate
- Add Internal Section
- View Activity Log
- Close Case
- Delete Case

43. Select Step #4 Case Review Steps."

San José State University > Cases > Samantha Spartan

Case Summary

Case Information Edit

Type	Reappointment	Name	Samantha Spartan
Unit	Marketing and Decision Sciences	Email	samantha.spartan@sjsu.edu

Candidate Requirements Edit

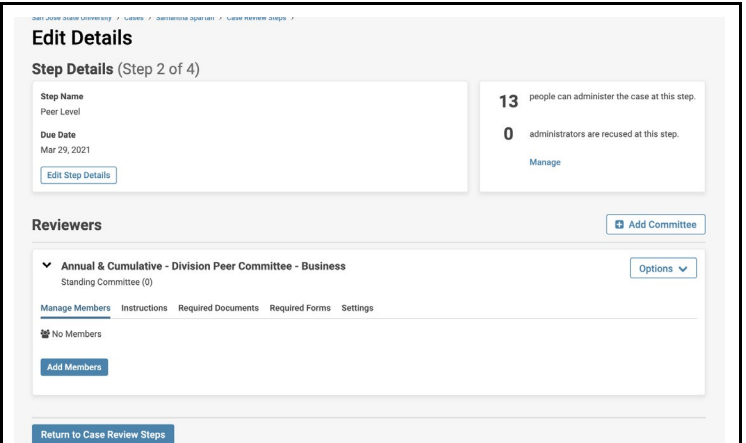
Packet Due: Mar 8, 2021

Instructions to the Candidate
Candidates upload the required items in Faculty180. These include the Annual Summary of Achievements (ASA-L) and direct

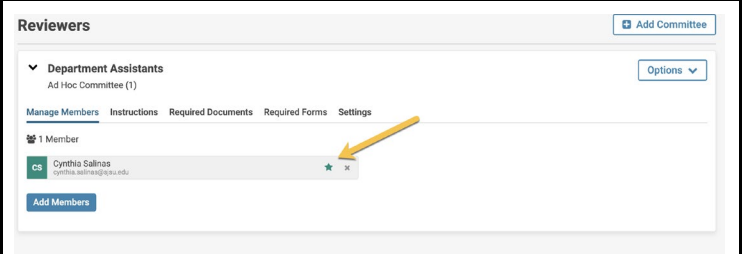
Creating a Case

- Case Information
- Candidate Requirements
- Internal Case Sections
- Case Review Steps
- Case Summary

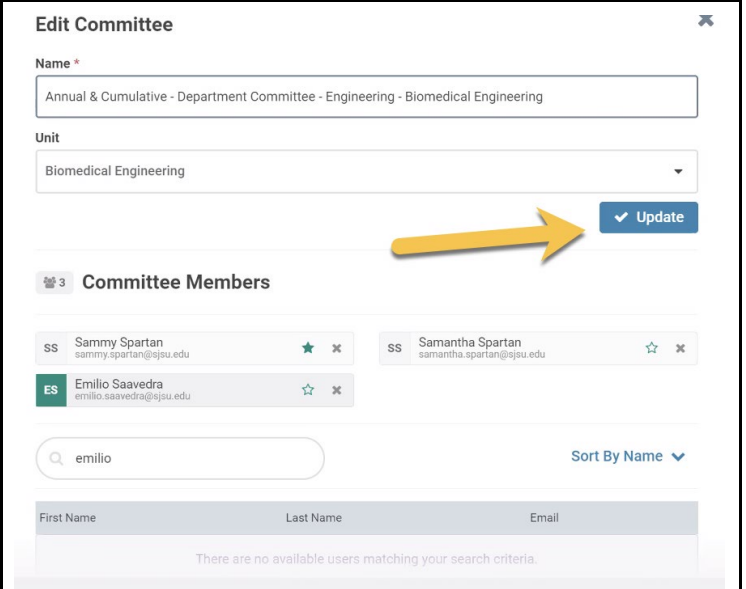
44. When you go back into the case, you will see those reviewers assigned to the case.



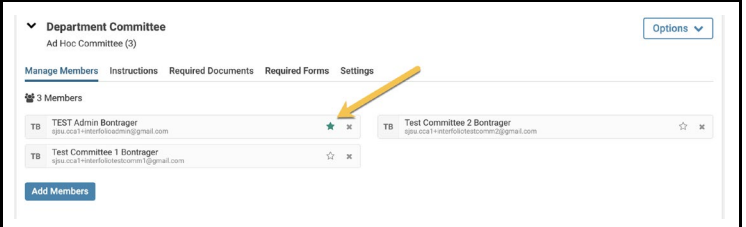
45. To edit committee members per case, you can add individuals. Also, select the star icon to designate committee manager--the one who submits forms and/or moves a case forward to the next reviewer step.



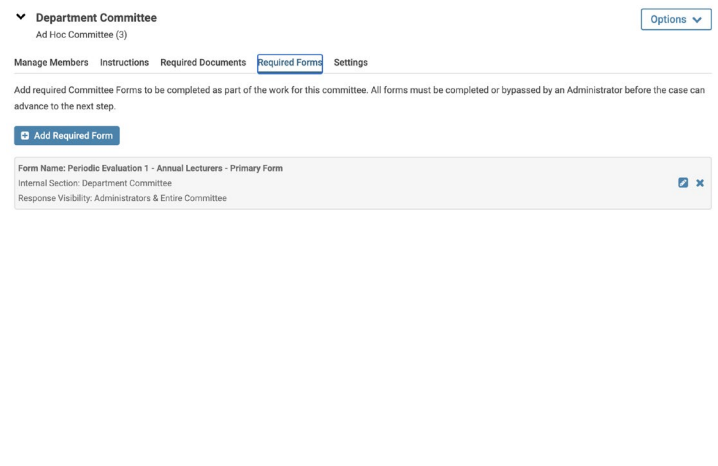
46. Select "Update".



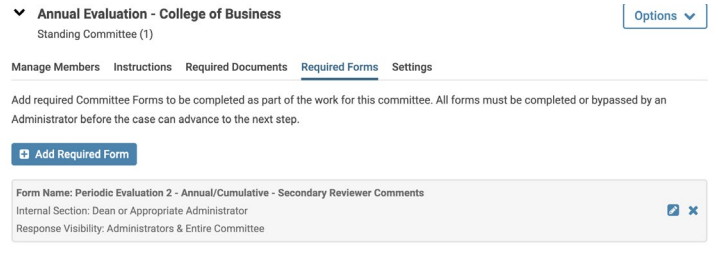
47. Complete the same steps for the next reviewer section.



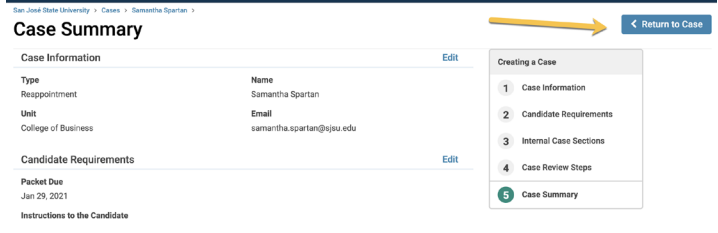
48. "Committees" will need to look for any required forms under "Required Forms." The manager fills in and submits the forms for Annual and Cumulative Evaluations. The forms are set up already within the templates. eFaculty Administrators may need to remind the Committees to submit any Required Forms. Please do not remove the forms included in the templates or attempt to bypass them.



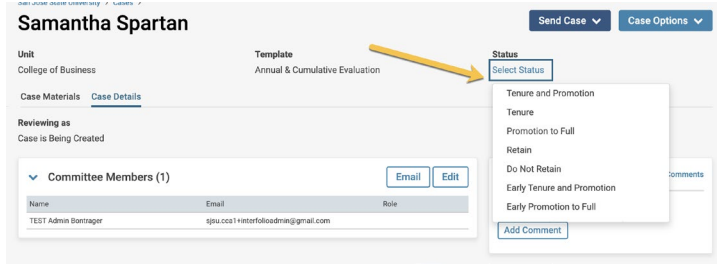
49. The dean's section will include a required form. Please remind the dean about filling in and submitting the required form. (They may also upload a memo if they'd like.)



50. After you have finished adding the names in the Case Review Steps, select "Return to Case".

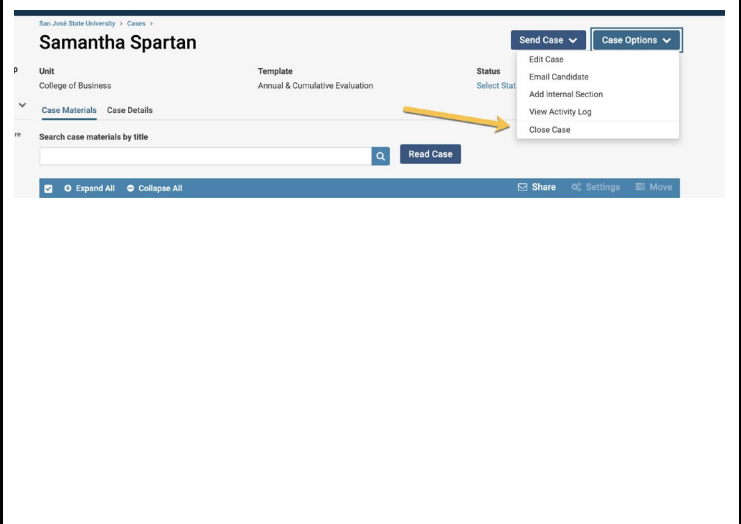


51. **Note: You do not need to select "Status"**. The "Status" is used by UP-FA to indicate the outcome of the case and during review to signal to candidates where their cases are in case steps.

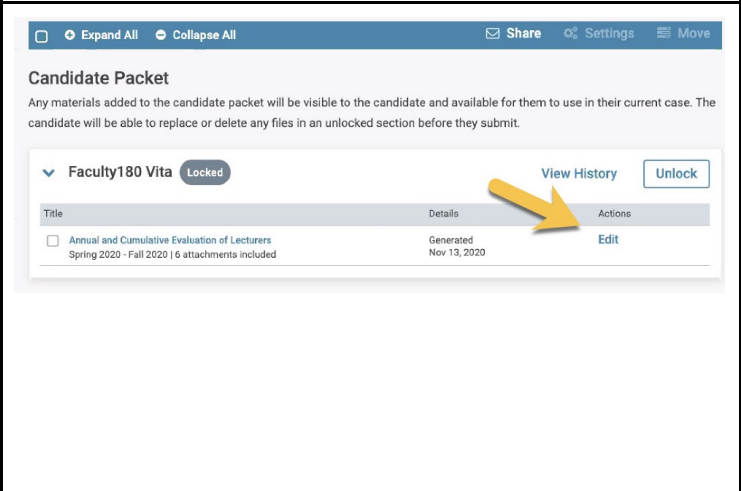


<p>52. You can also select "Case Details" to see the Comments.</p>	
<p>53. All eFaculty Administrators and reviewers will have the option to add comments to each case, and all comments can be seen by all users associated with that case.</p>	
<p>54. Select "Case Options" to view the activity log, delete the case, and other tasks.</p>	
<p>55. When finished creating the case, select "Send Case" and "Forward to" the first person to review the case.</p>	
<p>56. When forwarding the case, you can send an email through the eFaculty interface. Select "Send a message to the reviewers gaining access," include a "Subject" and include a "Message." You can also preview the message before sending the email. Select "Continue" to move to the next step. Note: Please refer to the Email Standard Messages section of this guide.</p>	

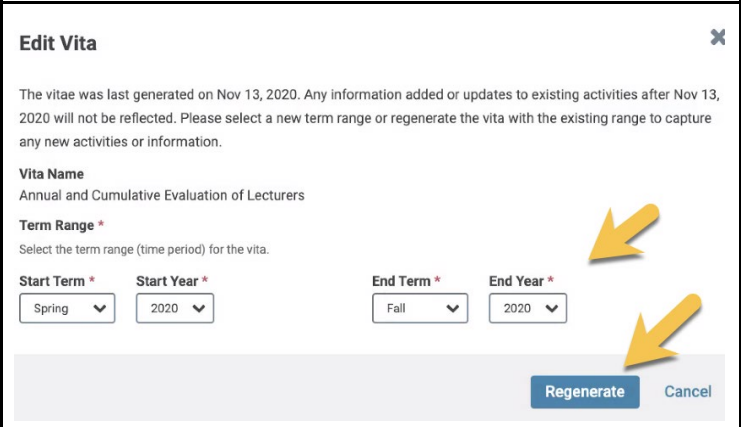
57. **Note: Do not close the case.** UP-FA will close the case. When the case is closed, the reviewer and the candidate will not be able to view the case. The Closed Case will be stored in eFaculty, and the Department Admin will be the only one who will have access to view the case.
NOTE: You may close and/or delete cases made in error. Upon closing a spoiled case, please use the status "delete" to signal need to delete if you forget to do it.

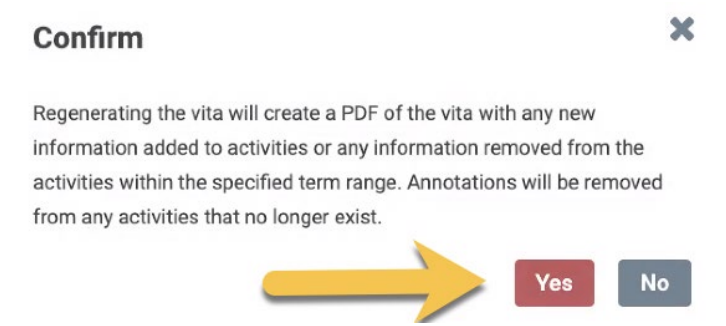
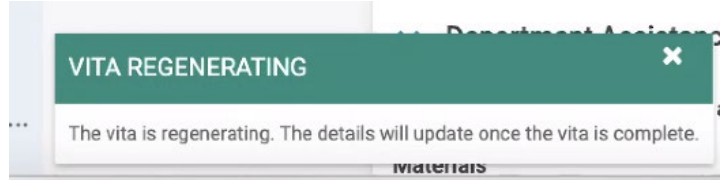

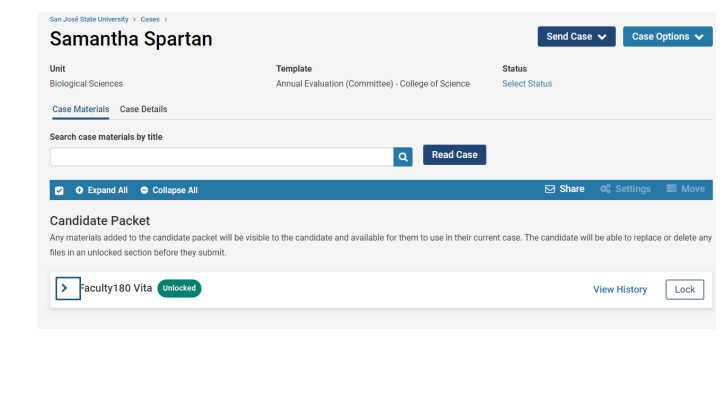
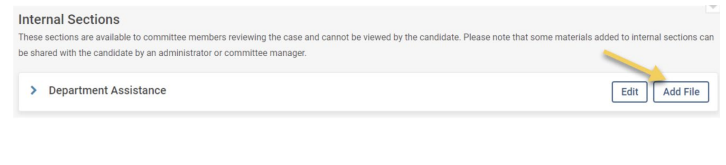


58. Once you receive the packet from the candidate, you'll need to regenerate the case. (The candidate may have forgotten to do this on their side.)
Note: Never regenerate the case again unless making an intentional change. Upon regeneration, changes made to the packet material will replace the current packet under review. You may lose items officially under review.

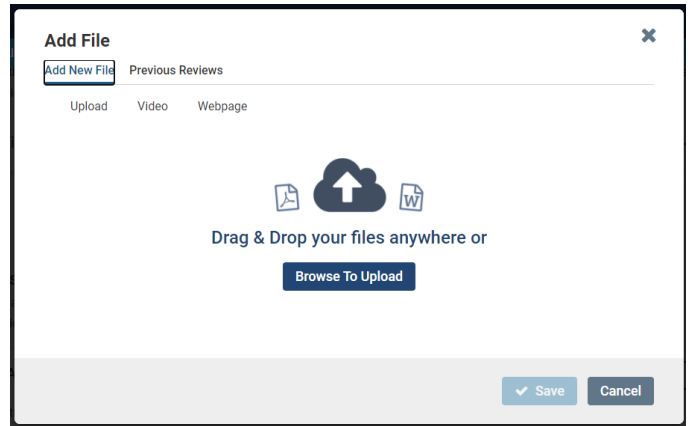


59. Make sure the Term Range is correct and select "Regenerate."



<p>60. Select "Confirm"</p>	
<p>61. You'll receive a confirmation that the vita is regenerated.</p>	
<p>62. The Details will indicate "Processing". Please allow a few minutes for the processing to finish.</p>	
<p>ADD THE PROVOST MEMO 63. Open the case and scroll down to "Internal Sections."</p>	
<p>64. Under "Department Assistance," select "Add File."</p>	

65. Add this [Memo File](#)
Note: If you need to add other files to the case, or even later on, a reviewer’s memo for them, you may add files in the area that is appropriate following this method.



This is a snippet of the memo -

Date: August 10, 2020

TO: All Faculty, Deans, and Associate Deans

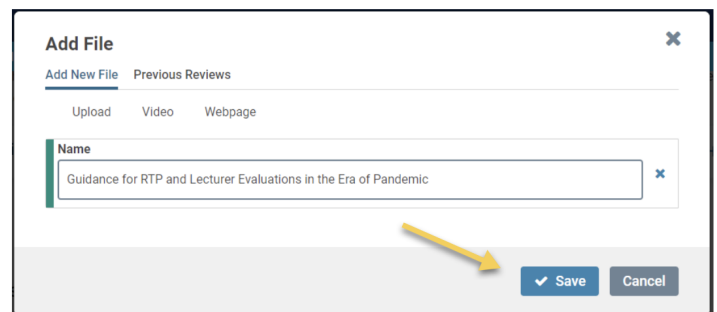
FROM: Vincent J. Del Casino Jr. *VJD*
 Provost and Senior Vice President for Academic Affairs

SUBJECT: Guidance for RTP and Lecturer Evaluations in the Era of Pandemic

The onset of the COVID-19 pandemic in the Spring of 2020 created an unprecedented environment for everyone at SJSU. The move to fully remote teaching, coupled with the fact that we were asked to “shelter-in-place” and abandon our work on campus, has differentially disrupted the progress of many of our colleagues.

With this in mind, this memorandum outlines how this major disruption should be considered in relation to the evaluation of RTP and lecturer evaluations. We still don’t know how much longer COVID-19 will alter our teaching, research, and service work; the concerns outlined below will need to be taken into consideration by review committees for many years to come.

66. Select “Save”



67. The memo's file name should appear under "Materials." It may take a few moments to completely upload.

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

▼ Department Assistance

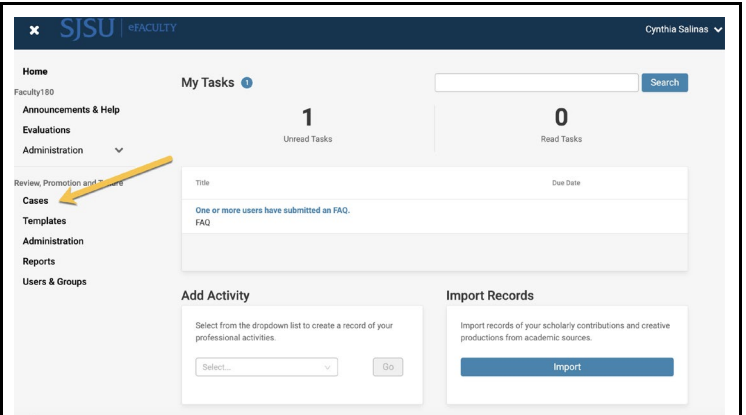
In this step, the department may assist the faculty member with proper assembly of all required items.

Materials

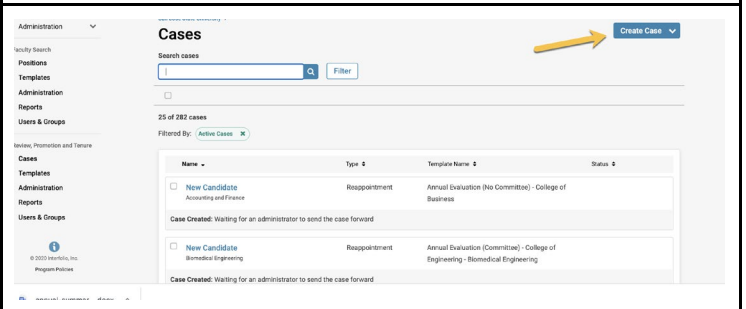
Title	Details
<input type="checkbox"/> Guidance for RTP and Lecturer Evaluations in the Era of Pandemic	Added by Junie Urbano Nov 24, 2020

CREATE A SINGLE CASE

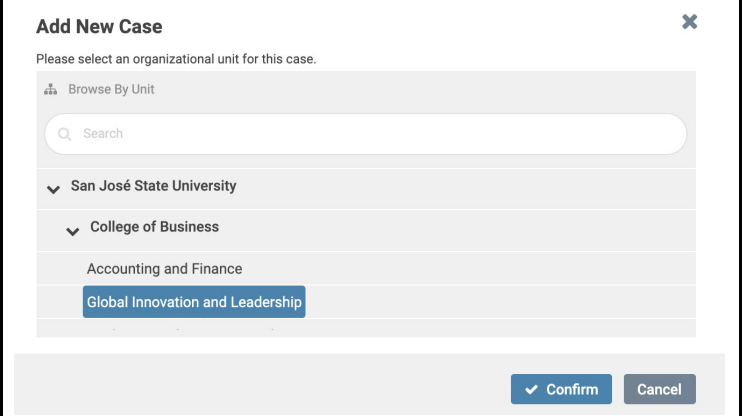
1. On the left-hand side, select "Cases" to view the case list for your college.



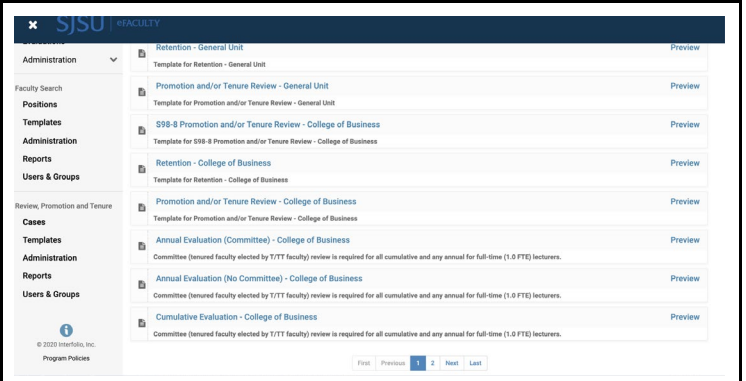
2. Create a single case and select "Create Case".

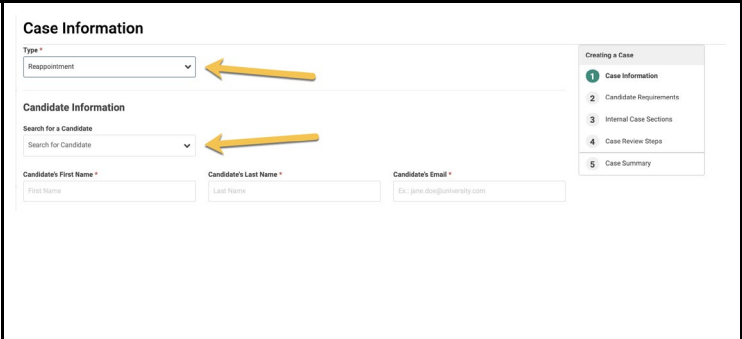
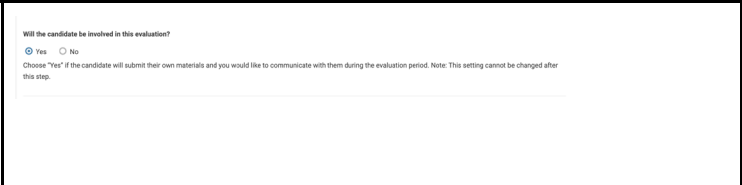
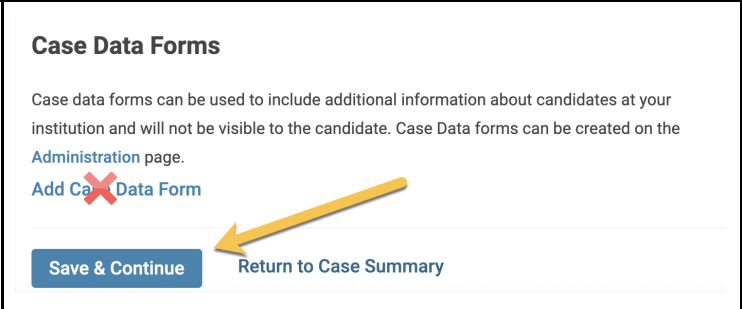


3. Select the unit which is the department and select "Confirm".



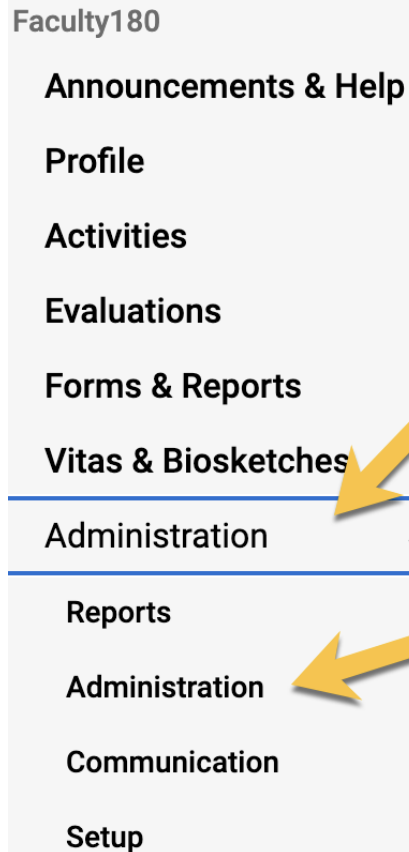
4. Select the appropriate template associated with the college or department. Either Annual Evaluation (Committee), Annual Evaluation (No Committee), and Cumulative Evaluation. Select "Continue" to move to the next step.



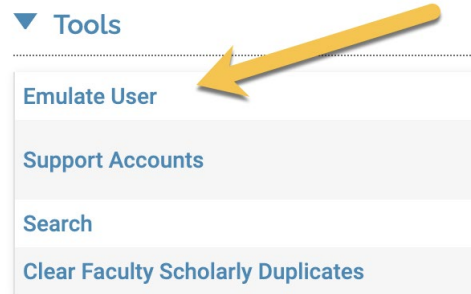
<p>5. For Step #1, enter the Case Information. The type of case for Annual and Cumulative will be "Reappointment." Search for the candidate's name. The Candidate's information should automatically populate. Then select "Save & Continue"</p>	
<p>6. The question "Will the candidate be involved in this evaluation?" should be automatically set as "Yes."</p>	
<p>7. "Case Data Forms" will not be required, so select "Save & Continue."</p>	
<p>8. To continue, refer to Step #26 on "Create Multiple Cases".</p>	

eFaculty Administrators may need to submit materials on the behalf of temporary faculty. Emulating a user allows eFaculty Administrators to view a temporary faculty’s profile and upload materials.

1. Under Faculty 180, select the down caret symbol near “Administration” and select “Administration”



2. Scroll down the page that opens, and in the “Tools” section, select “Emulate User”.



3. You'll be taken to the Emulate User window. Under the "University" category, select the number under "Total". That number is a URL link.

Administration

Emulate User

Count By Unit

Employment Status All Faculty ▾
 Assigned To Unit As Primary Unit ▾

Unit <input type="checkbox"/>	Total	Attached In		
		University	Division	C
<input checked="" type="checkbox"/> University	5192	36	-	

4. Use the search bar to locate the temporary faculty.

Select Faculty

Search Names Below

5. You will see the name of the temporary faculty once you enter the name. The name is a URL link, so select the name of the temporary faculty.

james lee

Lee, James

6. Verify the temporary faculty and select "Okay".

Emulate ✕

Emulate the following

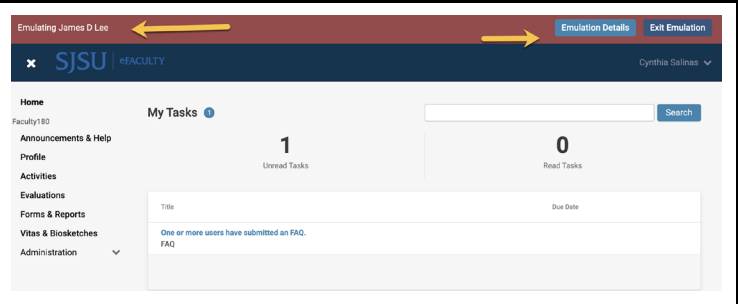
Name: Lee, James

Faculty ID: 123456789

Okay

Cancel

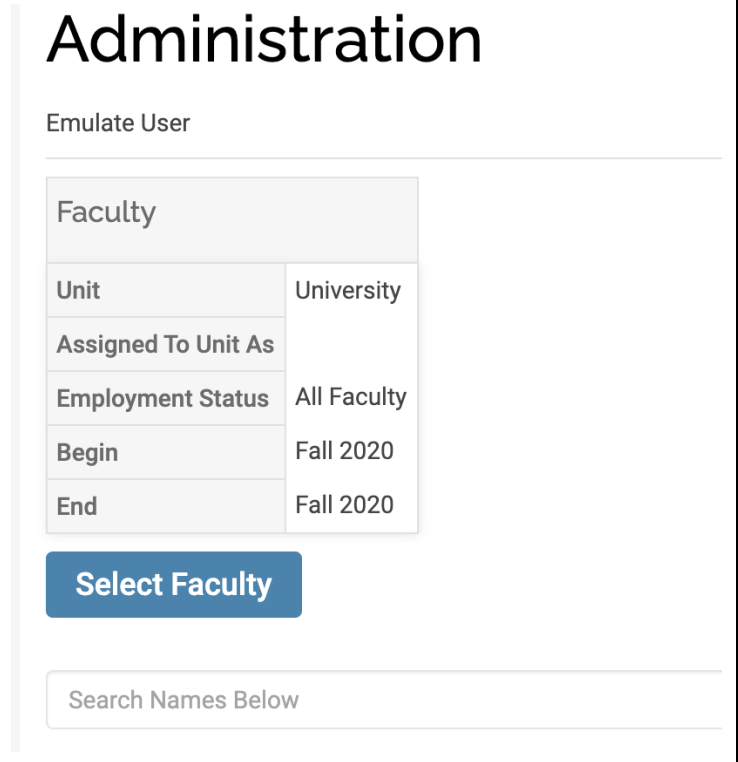
7. The next window will show a colored border at the top of the window. The left-upper corner will show "Emulating (faculty member)". The right-upper corner will show the "Emulation Details" and "Exit Emulation" buttons.



8. To quit emulating a user, select "Exit Emulation".



9. You will return back to the Emulation User window.



EMAIL STANDARD MESSAGES

Scenario #1: Sending the case to the CANDIDATE for ANNUAL EVALUATION

Subject: Annual Evaluation

Message:

Your Annual Evaluation case has been initiated by [**Department/Division Name**]. This will allow you to view your materials from the reviewers' perspective, and when you are ready, submit your annual evaluation packet for review. January 29, 2021 is the deadline for submission. You may work with your division's analyst before submitting to ensure that you have uploaded all required materials (please see [instructions for periodic evaluations](#)).

Assistance with using eFaculty is available at efaculty@sjsu.edu and help@interfolio.com, and multiple help documents are available at the [eFaculty Training and Help](#) web page:

- [Add files in eFaculty](#)
- [Submit the packet.](#)
- [Add or remove SOTE/SOLATES](#)
- [Entering eFaculty](#) (log into one.SJSU.edu and select the [eFaculty tile](#)).

Please do not hesitate to contact us if you have any questions.

Scenario #2: Sending the case to the CANDIDATE for CUMULATIVE EVALUATION

Subject: Cumulative Evaluation

Message:

Your Cumulative Evaluation case has been initiated by [**Department/Division Name**]. This will allow you to view your materials from the reviewers' perspective, and when you are ready, submit your annual evaluation packet for review. March 8, 2021 is the deadline for submission. You may work with your division's analyst before submitting to ensure that you have uploaded all required materials (please see [instructions for periodic evaluations](#)).

Assistance with using eFaculty is available at efaculty@sjsu.edu and help@interfolio.com, and multiple help documents are available at the [eFaculty Training and Help](#) web page:

- [Add files in eFaculty](#)
- [Submit the packet.](#)

- [Add or remove SOTE/SOLATEs](#)
- [Entering eFaculty](#) (log into one.sjsu.edu and select the [eFaculty tile](#)).

Please do not hesitate to contact us if you have any questions.

OTHER TASKS AND FUNCTIONS - Review, Promotion and Tenure

Administration Section

The Administration Section is where forms can be built, and case settings can be managed. You can also select Candidate Forms, Case Data Forms, and Committee Forms and integrate forms within a case.

Forms

Forms are built into the templates, forms can be created to collect information using a Candidate Form or add information during the Committee Process. To learn more about forms, visit [Working with Case Data and Candidate Forms](#).

Reports

Select "Reports" to view information about the cases and voting results. To learn more about reports, visit [Forms & Reports](#).

Users and Groups

eFaculty Administrators can create users and committee groups by selecting "Users and Groups" and selecting the "Unit." The Unit will be the department with which the user is associated. All users will need to log in using their SJSU credentials via SSO (Single-Sign-On), OKTA. Emails, such as a welcome email, can be sent via "Users and Groups."

Committee Members will most likely need to be added as users. Temporary Faculty should already be in eFaculty since they have a Faculty180 vita. New Temporary Faculty will be automatically entered into the system. Please do

not add temporary faculty to eFaculty. This will cause duplicates of their accounts and may result in authentication issues when logging in.

MORE HELP

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