

Moving Faculty Cases to Department/College Level

Sharing Evaluations with Faculty and 10 Day Optional Response

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Faculty Services
University Personnel*



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Annual/Cumulative Calendar

1/27/25 - 1/31/25: Document Verification Week

- Dept. Admin/Chair: Assisting faculty ensuring all documents have been submitted.
- Faculty are responsible for all document uploads, but may reach out to the Dept., and efaculty@sjsu.edu / scott.nguyen01@sjsu.edu for assistance.

1/31/25: Faculty Case Submission

- Please ensure that all packets are regenerated & submitted by the faculty. Submitted packets will be locked.
- If the faculty is unable to regenerate or submit, Dept., can assist with this process to ensure packets are submitted by 2/3/25.
- *****Packets that are not regenerated will NOT have the most recent documents uploaded to “Activities”*****

2/3/25: Cases Moved to Department Level:

- Committees and Chairs will now have access to faculty Annual Evaluations.



Calendar

JANUARY			
Ongoing	<i>Faculty add ASA-L and evidence of performance in eFaculty's F180 Activities areas.</i>	<i>Faculty prepare materials in F180 Activities areas before submit deadline³.</i>	Faculty use F180 in eFaculty
Fri, Jan 24	All Cases Created Departments review materials to assist faculty with adhering to requirements		Department via eFaculty RPT
Fri, Jan 31	Submit Annual Evaluation Packet <i>"Regenerate and Submit Packet"</i> <i>(Department Locks all packets)</i>		Faculty submit via eFaculty Department locks packet in RPT

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

*Reminder that faculty need to submit all documents and "Regenerate" by 1/31/25.

2/3/25: All cases need to be moves to the Department Level Review.

2/28/25: All cases need to be moves to the College Level Review.



Required Documents

As a reminder, this is a snapshot of the [list of Required Documents](#) faculty are responsible for submitting all documentation for their Annual/Cumulative Evaluation.

If they need assistance they may request help from the Chair/Dept, and FS (Scott Nguyen)

Contact:

Scott.nguyen01@sjsu.edu / efaculty@sjsu.edu

I do ask that they email my Direct email and CC: efaculty@sjsu.edu, for each and every email.

What to Submit

Where to Submit it

Annual Evaluation - eFaculty Placement

Item	Enter or Upload to This Activities Tab...
1. Annual Summary of Achievements - Lecturers/Librarians (ASA-L)	Review: Annual/Cumulative Evaluation of Lecturers
2. All SOTEs for prior calendar year; Syllabus for each course taught; other evidence of teaching effectiveness	Classes Taught at SJSU, SOTE/SOLATEs, Syllabi, etc. and/or Additional Courses and Student Evaluations <i>SOTE/SOLATEs from Spring 2013 to present are preloaded to these sections</i>
3. All Direct Observations of Teaching (peer evaluation) from the prior year	Direct Observations of Teaching
4. Any other department evaluations or evidence of performance in assignment	Choose tab as appropriate to tab's description

Cumulative Evaluation - eFaculty Placement

Item	Enter or Upload to This Activities Tab...
1. All prior reviews including ASAs and evaluator comments. Note: Faculty undergoing concurrent Annual Evaluation should note the date to upload Department Level Evaluation(s) and any Optional Response to F180, Activities Tab, "Prior Evaluations and Reviews"	Prior Evaluations and Reviews
2. All SOTEs from period of review; Syllabus for each course (title) taught; other evidence of teaching effectiveness	Classes Taught at SJSU, SOTE/SOLATEs, Syllabi, etc. and/or Additional Courses and Student Evaluations <i>SOTE/SOLATEs from Spring 2013 to present are preloaded to these sections</i>
3. All Direct Observations of Teaching (peer evaluation) from the period of review	Direct Observations of Teaching
4. Any other department evaluations or evidence of performance in assignment	Choose tab as appropriate to tab description

What do faculty need before we can move cases forward?

- Did faculty submit all: [Required Documents](#)?
 - ASA-L
 - Sotes/Solates
 - Direct Observations of Teaching
- Did faculty Regenerate there case?
 - Faculty should have regenerated to ensure all documents have been uploaded.
- Did faculty “submit”?
 - Faculty will also need to hit “Submit” to lock the case.
- **Can I regenerate after we submit my packet?**

Once cases are forwarded to review:
cases **CAN NOT be Regenerated**. Faculty can regenerate until 1/31/25 the submission due date.

What do Dept. Admin/Chairs do to assist?

- Did you verify the [Required Documents](#) are submitted?
 - Please reach out to faculty if they have missing documents.
 - Missing Sotes/Solates or Direct Observation of teaching.
 - Faculty need to place a memo stating why they are missing the above required documents.
- The faculty did not regenerate, can I regenerate for them? **Absolutely, YES!**
 - Faculty should have regenerated to ensure all documents have been uploaded. If they do not, please regenerate for them
- My Faculty forgot to submit can I submit for faculty? **Absolutely, YES!**



What should the case look like? Before Moving

Please make sure before sending:

- Correct Person
- Correct Unit
- Case Locked, If you see it unlocked, please lock.
- Case “Regenerated” Faculty180 Vita and Other documents unlocked, you must lock the packet.

If all of the aboved is checked off- please send the case forward.

The screenshot shows the 'Case Management' interface for a case titled 'Fern Alberts'. The interface includes a breadcrumb trail 'San José State University > Cases >', a 'Send Case' dropdown, and 'Case Options' dropdown. The 'Unit' is 'Philosophy' and the 'Template' is 'Annual Evaluation (Committee) - College of Humanities and the Arts - Philosophy'. The 'Status' is 'Select Status'. There are tabs for 'Case Materials' and 'Case Details'. A search bar is present with a 'Read Case' button. A control bar shows 'Expand All' and 'Collapse All' options, along with 'Share', 'Settings', and 'Move' icons. The 'Candidate Packet' section contains a table with columns for 'Title', 'Details', and 'Actions'. The table has two rows: 'Faculty180 Vita' (Locked) and 'Other Documents (Optional)' (Unlocked). The 'Faculty180 Vita' row shows a 'Generated Jan 24, 2025' date and an 'Edit' action. The 'Other Documents (Optional)' row shows an 'Add File' button. A message at the bottom states 'No files have been submitted.'

READ CASE: What to look for

Jane L. Huynh
 Spring 2024 - Fall 2024
 Annual/Cumulative Evaluations
 Lecturer
 jane.huynh@sjsu.edu

Review: Annual/Cumulative Evaluations

Spring 2024 - Fall 2024

Full Name: Jane Huynh, ID Number: 012/53195, Department(s): Interdisciplinary Engineering, Enter your assignment(s) and corresponding FTE(s) of each appointment by Semester/Session in the Calendar Year (by department if applicable). For example, Spring: Teaching 3 Classes :6; Major advising :2; Fall: Teaching :8.; Spring 2024: Teaching 3 Labs, 0.4 FTE.
 Fall 2024: Teaching 3 Labs, 0.4 FTE., 1. ACADEMIC ASSIGNMENT: TEACHING, SUPERVISION, AND/OR OTHER ACADEMIC WORK ASSIGNMENTS: Attended weekly team meetings to share and learn best practices from peers. Attended other relevant meetings (available on campus) to continue professional development, including Lecturer Lunch and Learn sessions. Also attended Advancing Inclusive Mentoring (AIM) and Mental Health First Aid (MHFA) programs. , 2. SERVICE TO STUDENTS, UNIVERSITY, PROFESSION: Written three student recommendation letters. , 3. ADDITIONAL ACHIEVEMENTS, QUALIFICATIONS, RSCA, AND/OR CONTRIBUTIONS: N/A., I affirm that the information contained in this Annual Summary of Achievements - Lecturer (ASA-L) is true and accurate to the best of my knowledge.: Yes

This is an example of a Faculty who added their ASA-L directly onto the faculty180 Website, and no ASA-L document was uploaded.

Packet	Annotations
<ul style="list-style-type: none"> ▼ FACULTY180 VITAE 	
Annual/Cumulative Evaluations	
<ul style="list-style-type: none"> ▼ Attachments from Annual/Cumulative Evaluations 	
<ul style="list-style-type: none"> ▼ Classes Taught at SJSU, SOTE/SOLATES, Syllabi, etc. 	
	<ul style="list-style-type: none"> Fall_2024_ENGR_10_04.pdf Fall_2024_ENGR_10_05.pdf Fall_2024_ENGR_10_17.pdf Spring_2024_ENGR_10_10.pdf Spring_2024_ENGR_10_20.pdf Spring_2024_ENGR_10_24.pdf
<ul style="list-style-type: none"> ▼ Direct Observations of Teaching 	<ul style="list-style-type: none"> Jane Fall 24.pdf
<ul style="list-style-type: none"> ▶ OTHER DOCUMENTS (OPTIONAL) ▶ DEPARTMENT ASSISTED DOCUMENT UPLOAD ▶ DEPARTMENT COMMITTEE ▶ DEPARTMENT CHAIR ▶ DEAN OR APPROPRIATE ADMINISTRATOR ▶ FACULTY SERVICE 	

As you can see here. There is no section for:

Review:
Annual/Cumulative Review.

But I do see the Sotes and the Direct Observations of Teaching documents uploaded.



- Navigate to one.sjsu.edu
- Log in
- Navigate to the efaculty tile



- Here you can access the Annual/Cumulative cases that you have create.
- Click on the cases in your landing page to view the Faculty.
- Or Click on “Cases”

A screenshot of the SJSU eFACULTY dashboard. The top navigation bar shows 'SJSU | eFACULTY' and the user 'Scott Nguyen'. The main content area includes a 'Home' section with a holiday notice, 'Announcements & Help', 'Evaluations', and 'Administration' menus. A 'My Tasks' section shows 54 unread tasks and 0 read tasks. A table lists several cases with their titles and due dates. A yellow highlight is placed on the 'Cases' menu item in the left sidebar, with an arrow pointing to the table. The table has columns for 'Title' and 'Due Date'.

Title	Due Date
Craig England Chemical & Materials Engr Review Lecturer Range Elevation - College of Engineering	Mar 7, 2025
Igor Tyukhov Interdisciplinary Engineering Review Lecturer Range Elevation - College of Engineering	Mar 7, 2025
Susan Trimmingham Art and Art History Review Lecturer Range Elevation - College of Humanities and The Arts	Mar 7, 2025
David Williams Kinesiology Review Lecturer Range Elevation - College of Health and Human Sciences	Mar 7, 2025
John Todd	Mar 7, 2025



To Send Case Forward:

- Once we have located the faculty case we want to move.
- Please “Check”, the box to the left of there name.
- Once Selected: Hit “Send Forward”
- This will bring up “Send Case Forward” screen.

The screenshot shows the SJSU eFACULTY interface. At the top, there is a search bar with 'sammy' entered and a 'Filter' button. Below the search bar, there are navigation buttons: 'Notify Candidates', 'Send Backward', 'Send Forward' (highlighted in yellow), 'Close Cases', and 'More Options'. A sidebar on the left contains navigation links: Home, Faculty180, Announcements & Help, Evaluations, Administration, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area shows '2 of 2 cases' filtered by 'Active Cases'. A table lists two cases:

Name	Type	Template Name	Status
<input checked="" type="checkbox"/> sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 1 of 4: Department Assistance Jan 31, 2025			
<input checked="" type="checkbox"/> sammy spartan Applied Data Science	Review	Mini Review of Probationary Faculty	
Step 1 of 5: Faculty Services Admin Step			

Two blue arrows point from the 'Send Forward' button to the 'Reappointment' and 'Review' rows in the table.

Please Make a note we only want to move forward cases that are Reappointments. In this example above you can see that Sammy has a Re-apt for Accounting and Finance.

As well as another , “Mini Review” - **Please ensure we are moving the correct cases .**



Please input Email Title:

Annual Evaluation Case is Available
for Review

Messaging Templates has been
Provided in the previous training
slides.

[Pg.17](#) - Annual Evaluation -On 2/3/25

[Pg.18](#) - Cumulative Template
Preview & Send - On 3/17/2025

The screenshot shows a web interface for SJSU Faculty. A modal dialog box titled "Send Cases Forward" is open. The dialog contains the following elements:

- A close button (X) in the top right corner.
- Text: "Please confirm you wish to send the following cases forward to the next step in the review process."
- Two text input fields, each containing the text: "sammy spartan is moving forward to 'Department Level'".
- A checked checkbox labeled "Send a message to the reviewers gaining access." with the subtext: "If recipients respond to this message, their response will come directly to your email inbox."
- A "Subject *" field containing the text: "Annual Evaluation Case is available for Review".
- A "Message *" field with a rich text editor toolbar (bold, italic, underline, link, etc.) and the following text: "Dear Committee Members, 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 reviewer's 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".
- Buttons at the bottom: "Preview" (with an eye icon), "Send" (with a right arrow icon), and "Cancel".

The background shows a sidebar menu with items like Home, Faculty180, Announcements & Help, Evaluations, Administration, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The user's name "Scott Nguyen" is visible in the top right corner.



Alternatively you can send cases forward from within the faculty case.

To Move forward:

- Navigate to the top right hand corner
- Select “Send Case”
- “Forward to Department Review”
- This will bring up the “Send Case Forward Screen”, please refer to the previous slides for the templates.

The screenshot displays the SJSU eFACULTY interface for a case titled "sammy spartan". The interface includes a navigation menu on the left with categories like Home, Announcements & Help, Evaluations, Administration, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area shows case details for "sammy spartan" in the "Accounting & Finance" unit, with a template of "Annual Evaluation (Committee) - College of Business - Accounting and Finance". A "Send Case" dropdown menu is highlighted, with "Forward to Department Level" selected. Below this, there is a search bar for case materials and a "Read Case" button. A "Candidate Packet" section is also visible. A modal window titled "Send Cases Forward" is overlaid on the screen, containing a confirmation message, a checked checkbox for "Send a message to the reviewers gaining access", a subject field with the text "Annual Evaluation Case is available for Review", and a message field. The modal also includes "Preview", "Send", and "Cancel" buttons. A blue arrow points from the text in the previous slide to the "Send Cases Forward" modal.



Successfully Moved to the next stage

Once successfully moved you will see that the case has updated itself to the step that we have moved it too.

On 1/31/25 - Cases either will be in “Case is with Candidate” or it will be in “Step 1 of 4: Department Assistance”

On Monday 2/3/25 - All Cases should now be moved to

“Step 2 of 4: Department Level” Due Feb 26, 2025

Due Feb 26, 2025 - Department level review submission

<input type="checkbox"/>	sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance
Case is with candidate			

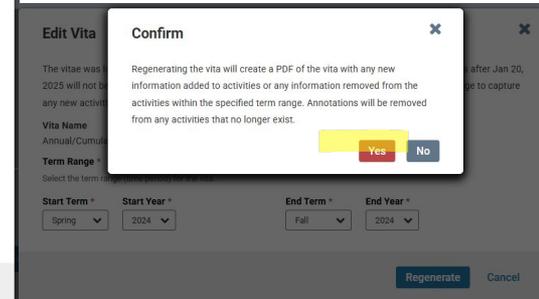
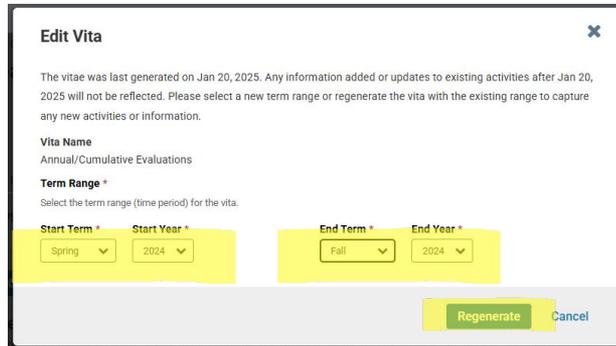
Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<input type="checkbox"/>	sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance
Step 1 of 4: Department Assistance Jan 31, 2025			

Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<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 ⚠ Required Documents			



How to Regenerate for faculty

- Navigate to the faculty case
- Click “Edit” in the Faculty 180 Vita section
- A pop up will appear, and please make sure the Term Ranges inputted are correct, this is pull all documents within the select Term Ranges
- Hit “Regenerate” then “Yes” to Confirm
- After you have confirmed, refresh your browser and the regenerate should now be completed.



During this phase, we will be moving cases:

From Step 2: Department Level

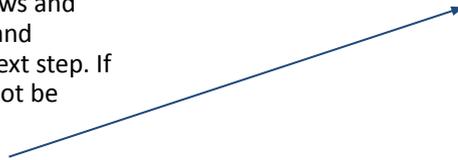
Submission Date: **2/26/2025** - All reviews and confidentiality agreements must be signed and submitted prior to moving the case to the next step. If these documents are not present, you will not be allowed to move the case forward

If they are not present, you will see the “Required Documents” notification stating they are missing. Packets with missing reviews from the committee will not be allowed to move forward.

To Step 3: Dean or Appropriate Administrator

Submission Date: **4/8/2025**

Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<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 ⚠ Required Documents			



Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<input type="checkbox"/> sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 3 of 4: Dean or Appropriate Administrator Apr 8, 2025			



On 2/28/2025 - Departments will share with faculty the:

Department level reviews

As well as provide a **10 Day Optional Response**. On 2/28/25

On **Tuesday 3/11/2025** - All packets will then move to the College level -

Step 3, please review slides for instructions.

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 type="checkbox"/> Annual Evaluation Review by Scott Nguyen	Added by Scott Nguyen Jan 27, 2025	Edit

> Department Chair

Edit

Add File

> Dean or Appropriate Administrator

Edit

Add File

> Faculty Services

Edit

Add File



To Share Documents:

Click the checkbox next to the document you wish to share with the faculty.

- After the document is selected.
- Click “Share” Located in the Blue bar
- Select “with Candidate”
- This should bring you to the next page

The screenshot shows a web interface for document management. At the top, there is a blue bar with 'Expand All' and 'Collapse All' options, and a green 'Share' button with an envelope icon. Below this, the 'Internal Sections' are listed. Two yellow callout boxes highlight the sharing options: 'With Candidate' and 'With Committee Members'. The 'Department Assisted Document Upload' section has 'Edit' and 'Add File' buttons. The 'Department Committee' section also has 'Edit' and 'Add File' buttons. Underneath, a table of 'Materials' is shown with columns for Title, Details, and Actions. One document is listed: 'Annual Evaluation Review by Scott Nguyen', which has a checked checkbox in the first column, 'Added by Scott Nguyen Jan 27, 2025' in the second, and an 'Edit' link in the third.

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



[Template Located on - Pg. 19](#)

- Please add a Subject heading and the body

- Must Enable “File Response” in order for the faculty to reply.

- Deadline: 3/10/25

Message to Candidate

To

sammy spartan (sammy.spartan@sjsu.edu)

Subject *

10-Day Optional Response - Annual Evaluation

Message *



Dear Faculty Member,

The department has concluded its review of your range elevation application. Their recommendation is attached. You have 10 days to provide an optional response. If responding, please submit by Monday, March 10, 2025. If you do not respond, the case will still be moved forward. The link above will not work for sign-on unless you are already signed in to your faculty account—visit one.sjsu.edu.

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

Optional Responses shall be limited to a statement that focuses primarily on one or more of the following:

body p strong

Share Files

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

+ Add

Annual Evaluation Review by Scott Nguyen

Preview

Send

Cancel



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 *

Department Chair

Questions or need 1 on 1 assistance, please contact:

eFaculty@sjsu.edu

[Open Lab Schedule:](#)

Tuesday 2pm-3pm

Thursday 11am - 12pm

By Phone: x4-2204

By email: scott.nguyen01@sjsu.edu



Open Lab - Open for all

1/31/25 - 11-12pm

1/31/25 - 1-2pm

