

Part 1: Annual & Cumulative Evaluations: Case Creation

*Scott Nguyen
Faculty Services
University Personnel*

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Annual Evaluation Template Selection

Evaluation Selection Criteria	
Annual Evaluation	- All full-time (1.0 FTEF) and part-time (less than 1.0 FTEF) lecturers who have been appointed for two or more semesters, but not holding a three (3) year appointment. - All full-time and part-time temporary faculty with three (3) year appointments must be evaluated at least once during the three-year appointment term.
Committee	"Faculty with a 1.0 FTE in your department: Please select the template that includes a committee. Departments may choose the 'Committee' option for all cases, but this is not required. Only create a committee case for part-time faculty if your department uses a committee for all reviews, otherwise select "No-Committee)." Annual Evaluation (Committee) - College of Business - Accounting and Finance
No Committee	Faculty who are Part-Time under 1.0 FTE, Please select, No Committee. Part-Time Faculty may have a Committee review per Chair/Dean request Annual Evaluation (No Committee) - College of Business - Accounting and Finance



Cumulative Evaluation

Consideration for new or renewed three-year appointments (“entitlement”) can only be made after faculty undergo cumulative evaluation.

- New appointments are considered in the 6th year of six consecutive years of service in the department, with review occurring in spring of the 6th or subsequent year.
- Renewals follow three consecutive years of an appointment, with review occurring in spring of the 3rd or subsequent year.

Evaluation Selection Criteria	
Cumulative Evaluation	Consideration for new or renewed three-year appointments (“entitlement”) can only be made after faculty undergo cumulative evaluation. • New appointments are considered in the 6th year of six consecutive years of service in the department, with review occurring in spring of the 6th or subsequent year. • Renewals follow three consecutive years of an appointment, with review occurring in spring of the 3rd or subsequent year. Cumulative Evaluation - College of Business - Accounting and Finance



Steps List for Creating a New Case

- **Step 1:** Select “Cases”, in the Main Menu Bar
- **Step 2:** Select “ Create Case”, Top Right Hand Corner
- **Step 3A:** Please click, “Select Candidates”
- **Step 3B:** Please click, “Select Candidates”
- **Step 4:** Please click Continue, proceed to the next page
- **Step 5:** Please select the Department & Case Type (Reappointment)for the Faculty
- **Step 6:** Template Select
- **Step 7:** Set Deadline 1/31/2025
- **Step 8:** Set Settings - Modifications
- **Step 9:** Send Case to the Faculty
- **Step 10:** Send Case to Step 1 - Department Assisted Document Upload



Step 1: Select “Cases”

Step 1: Log in
to eFaculty and
click on **Cases**,
in the main
page.



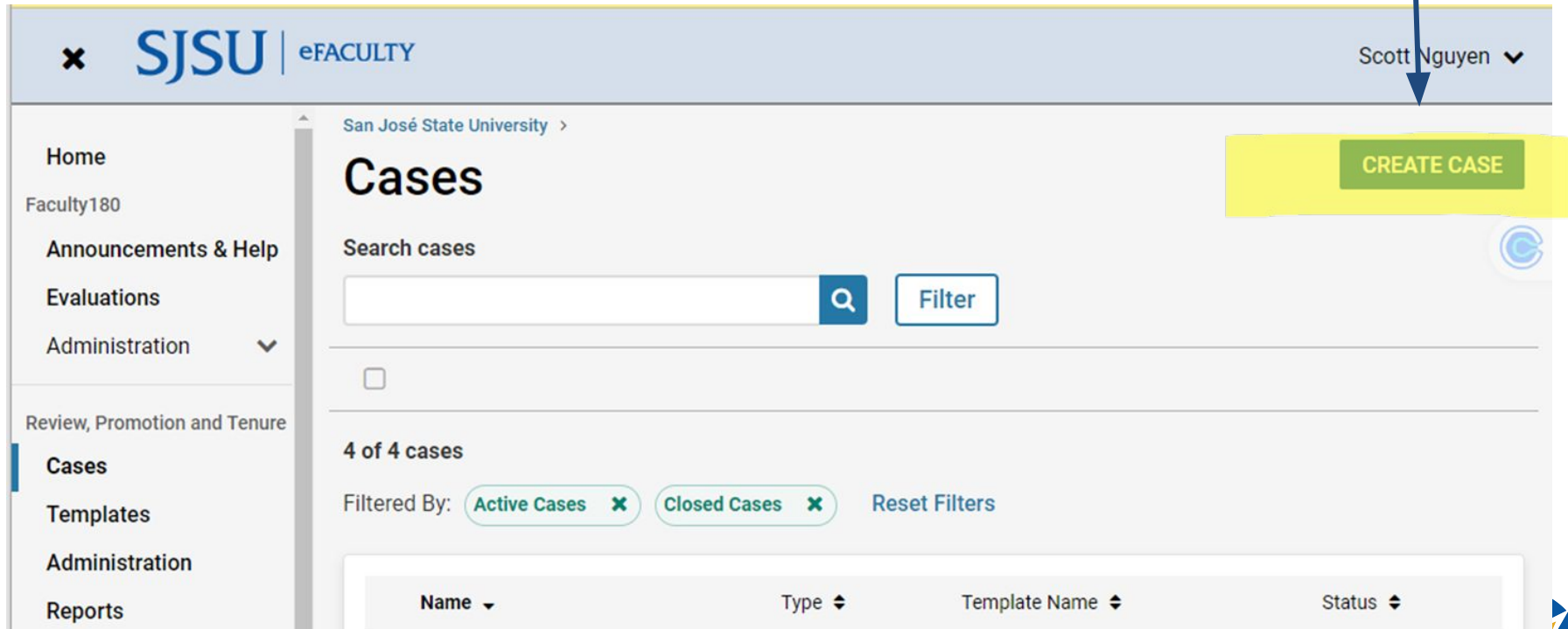
The screenshot shows the eFaculty dashboard interface. On the left is a sidebar menu with the following items: Home, Faculty180, Announcements & Help, Evaluations, Administration (with a dropdown arrow), Review, Promotion and Tenure (with a dropdown arrow), **Cases** (highlighted in yellow), Templates, Administration, Reports, and Users & Groups. The main content area has a header with 'My Tasks' and a badge showing '17'. Below this, it displays '17 Unread Tasks' and '0 Read Tasks'. A search bar is located in the top right. The main content area contains a table with the following data:

Title	Due Date
Javier Cardoza-Kon Philosophy Review Lecturer Range Elevation - College of Humanities and The Arts	Oct 23, 2024
Alicia Hedges Anthropology Review Lecturer Range Elevation -College of Social Sciences	Dec 5, 2024
Padmaja Iyer Environmental Studies Review Lecturer Range Elevation -College of Social Sciences	Dec 5, 2024



Step 2: Select “Create Case”

Step 2: Click “Create Case”
Case” HERE

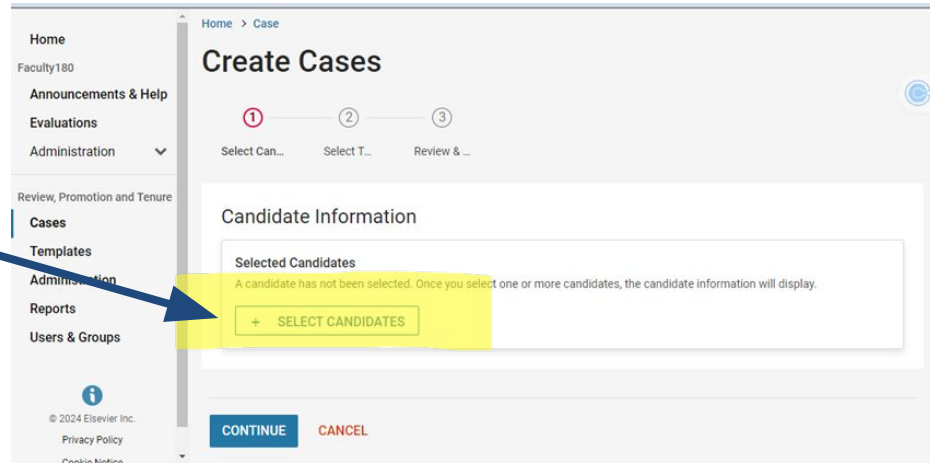


The screenshot shows the SJSU eFACULTY interface. The top header bar is light blue and contains the SJSU logo, the text 'eFACULTY', and a user profile for 'Scott Nguyen' with a dropdown arrow. Below the header, on the right, is a yellow button labeled 'CREATE CASE'. A blue arrow points from the text 'Step 2: Click “Create Case” Case” HERE' to this button. The main content area is titled 'Cases' and includes a search bar with a magnifying glass icon and a 'Filter' button. Below the search bar, there is a section for '4 of 4 cases' with filter buttons for 'Active Cases' and 'Closed Cases', and a 'Reset Filters' link. At the bottom, a table header is visible with columns: 'Name', 'Type', 'Template Name', and 'Status'.



Step 3A: Click, “Select Candidates”

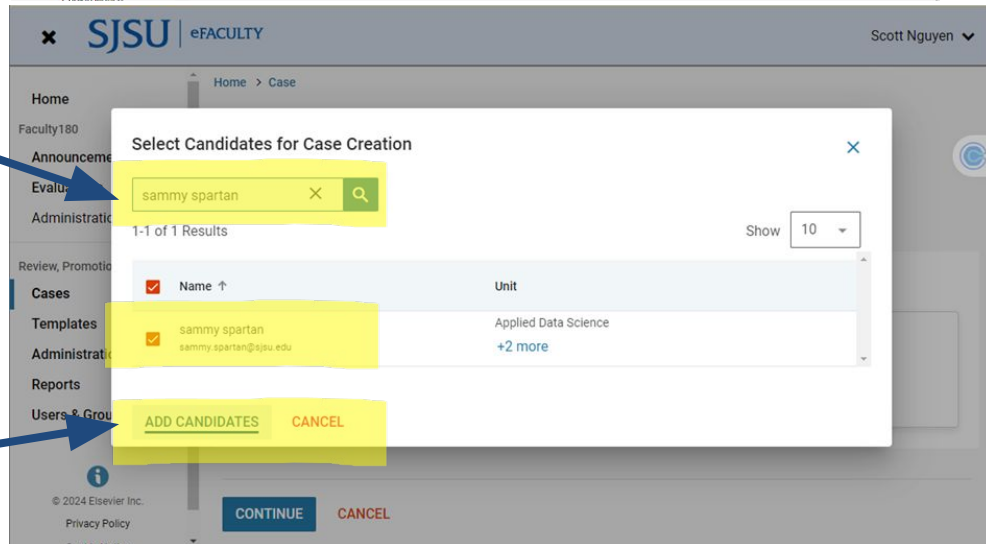
Step 3 Part A:
Please click,
“+ Select Candidates”



Step 3 Part A:
Enter in the Faculty Name

Please make sure to check
the red box.

Click, “Add Candidates”



Name	Unit
☒ sammy spartan sammy.spartan@sjsu.edu	Applied Data Science +2 more



Step 3B: Click, “Select Candidates”

Step 3: Part B
Enter in the Faculty
Name

Please make sure to
Check the red Box.

Select, “Add
Candidate”

The screenshot shows the SJSU eFACULTY interface. A modal window titled "Select Candidates for Case Creation" is open. It features a search bar with the text "sammy spartan" and a magnifying glass icon. Below the search bar, it indicates "1-1 of 1 Results". A table displays the search results with columns for "Name" and "Unit". The first row shows "sammy spartan" with the email "sammy.spartan@sjsu.edu" and the unit "Applied Data Science". There is a "+2 more" link below the unit name. At the bottom of the modal, there are two buttons: "ADD CANDIDATES" (highlighted in yellow) and "CANCEL". The background interface shows a sidebar with various navigation options like "Home", "Faculty180", "Announcements", "Evaluation", "Administrative", "Review, Promotion", "Cases", "Templates", "Administrative", "Reports", and "Users & Groups". The top right corner shows the user's name "Scott Nguyen".

Name	Unit
✓ sammy spartan sammy.spartan@sjsu.edu	Applied Data Science +2 more



Step 4: Select Continue, to proceed to the next page

Step 4: Once the faculty
has been selected, click
“Continue” to proceed to
the next page.



SJSU | eFACULTY Scott Nguyen ▾

Home > Case

Create Cases

1 2 3
Select Cand... Select Te... Review & S...

Home
Faculty180
Announcements & Help
Evaluations
Administration ▾
Review, Promotion and Tenure
Cases
Templates
Administration
Reports
Users & Groups

Candidate Information

Selected Candidates

1-1 of 1 Results Show 10 ▾

Candidate ↑	Unit ↑
ss sammy spartan sammy.spartan@sjsu.edu	Applied Data Science +2 more

+ SELECT CANDIDATES

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CONTINUE CANCEL



Step 5: Select the Department & Case Type

Step 5: Select the
Department for the
faculty

Please select the Type of
"Reappointment"

***Important Note:**

If you select the wrong
Dept., you will not be
able to update this after
the case has been
created.

A new case for the
candidate will need to be
created, if this mistake
occurs.

The screenshot shows the 'Create Cases' page in a web application. On the left is a sidebar menu with items: Home, Faculty180, Announcements & Help, Evaluations, Administration (with a dropdown arrow), Review, Promotion and Tenure, Cases (highlighted with a blue bar), Templates, Administration, Reports, and Users & Groups. Two blue arrows originate from the text on the left: one points to the 'Cases' menu item, and the other points to the 'Reappointment' option in the 'Type' dropdown. The main content area has a breadcrumb 'Home > Case' and a title 'Create Cases'. Below the title is a progress bar with three steps: 1 (checked), 2 (highlighted in red), and 3. Step 2 is labeled 'Select Templ...' and step 3 is 'Review & Setti...'. Below the progress bar is a section titled 'Select Case Settings' containing two dropdown menus. The first is 'Unit for Case(s) *' with the text 'Cases can only be created in one unit.' and the selected value 'Accounting & Finance'. The second is 'Type' with the selected value 'Reappointment' and a close button (X).



Step 6: Template Selection, please select the correct Template Type

Note:

- Full Time Faculty - Committee
- Part-time Faculty - No Committee

SJSU | eFACULTY
Scott Nguyen

Home

Faculty180

Announcements & Help

Evaluations

Administration ▾

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

Select Template

Templates are based on the unit and case type chosen in the case settings.

1-8 of 8 Templates

Template Information ↑	Unit ↑	Type
☐ Custom Case Create a unique case by customizing forms and workflow steps rather than using a template.		
☐ Annual Evaluation (Committee) - College of Business - Accounting and Finance Committee (tenured faculty elected by T/TT faculty) review is required for all cumulative and any annual for full-time (1.0 FTE) lecturers.	Accounting & Finance	Reappointment
☐ Annual Evaluation (No Committee) - College of Business - Accounting and Finance Committee (tenured faculty elected by T/TT faculty) review is required for all cumulative and any annual for full-time (1.0 FTE) lecturers.	Accounting & Finance	Reappointment
☐ Cumulative Evaluation - College of Business - Accounting and Finance Committee (tenured faculty elected by T/TT faculty) review is required for all cumulative and any annual for full-time (1.0 FTE) lecturers.	Accounting & Finance	Reappointment
☐ Annual Evaluation (Committee) - College of Business- Dean's Office Only Committee (tenured faculty elected by T/TT faculty) review is required for all cumulative and any annual for full-time (1.0 FTE) lecturers.	College of Business	Reappointment
☐ Annual Evaluation (No Committee) - College of Business- Dean's Office Only Committee (tenured faculty elected by T/TT faculty) review is required for all cumulative and any annual for full-time (1.0 FTE) lecturers.	College of Business	Reappointment
☐ Cumulative Evaluation - College of Business- Dean's Office Only Committee (tenured faculty elected by T/TT faculty) review is required for all cumulative and any annual for full-time (1.0 FTE) lecturers.	College of Business	Reappointment
☐ Test Only Annual Evaluation (No Committee) - College of Engineering (copy) Committee (tenured faculty elected by T/TT faculty) review is required for all cumulative and any annual for full-time (1.0 FTE) lecturers.	San José State University	Reappointment



Step 7: Enter the deadline set from the Calendar

This is the packet submission date for Faculty.

Please update the “Faculty Activity Reporting Vita”, to the correct Time Frame

*Note that the dates used are for example only. Please refer to the [Calendar](#) for Due date.

Home > Case

Create Cases

Faculty180

Announcements & Help

Evaluations

Administration

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

Home

Home > Case

Create Cases

1 Select Candidate(s)

2 Select Template

3 Review & Settings

Review & Settings

Case Information

Unit for Case(s) * Accounting & Finance

Type Reappointment

Template *

Annual Evaluation (Committee) - College of Business - Accounting and Finance

Candidate Requirements

Soft Deadline 1/31/2025

Candidate Requirements

1 Section

Faculty Activity Reporting Vita

Term Range: Fall 2023 - Fall 2024

[EDIT CANDIDATE SECTIONS](#)

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• Annual: Spring 24 - Fall 24

• Cumulative: 3 year - Fall 2022 - Spring 25

• Cumulative: 6 year - Fall 2019 - Spring 25 (Include Covid Memo)

Step 8: Settings

Will the candidate be involved in this evaluation? Select: YES

Would you like to Notify the candidate now? Select: YES

Enter Notification Message here: Please review premade template slides.

Select “Create 1 Case”, to complete case creation.

Settings

Will the candidate be involved in this evaluation? *

This setting cannot be changed after this step. Learn more about candidate involvement.

- ☒ Yes, the candidate will be involved during the case.
☐ No

Would you like to notify the candidates now? *

An automatic notification will be sent to the candidate after the case is created with instructions for uploading and submitting materials.

- ☒ Yes
☐ No

Subject *

Annual Evaluation Case C

Message

11pt B I x² =

Dear Lecturer,

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 31, 2025 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/soott.nguyen01@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](#)).

P > SPAN

POWERED BY TINY

658/6000 characters

PREVIEW

CREATE 1 CASE

PREVIOUS

CANCEL

Step 9: Send Case to the Faculty

Step 9: Once the case is created, ensure that the faculty is notified.

- If you did not send the message during case creation you may now do so now to notify the faculty

☐ Sammy Spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance
Case Created: Waiting for an administrator to notify candidate		

San José State University > Cases >

Sammy Spartan

Unit
Accounting & Finance

Template
Annual Evaluation (Committee) - College of Business -
Accounting and Finance

Send Case ▼

Candidate
Notify Candidate

Forward to
Department Assisted Document Upload

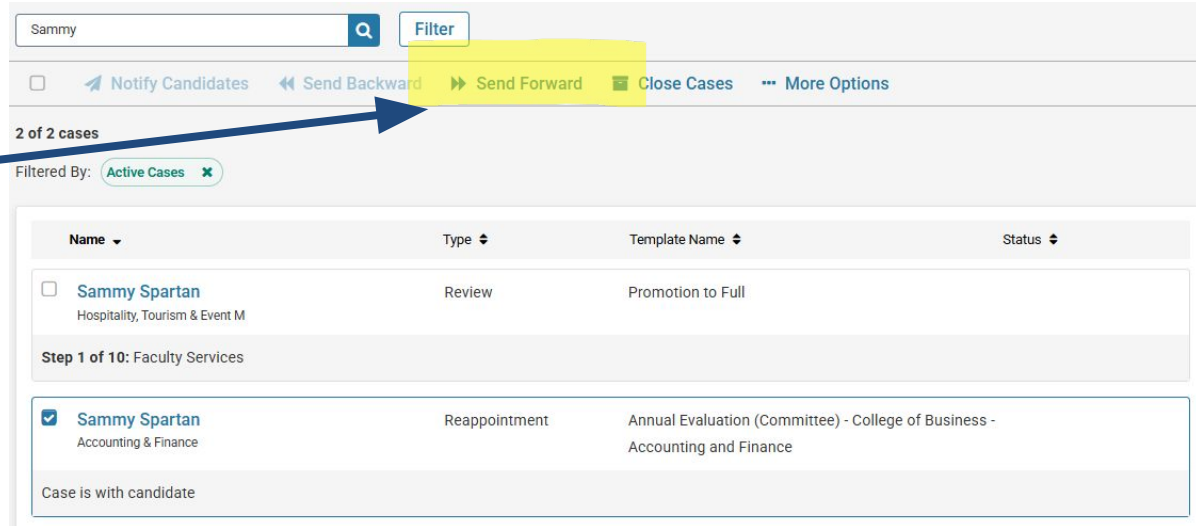
Case Options ▼



Step 10: Move Case to Step 1

Step 10: To send the case forward, click the box next to Sammy's name and click "Send Forward."

- Or, enter Sammy's case and click "Send Case" and "Forward to Department Assisted Document Uploads" option shown below



Sammy

Filter

☐ Notify Candidates ☒ Send Backward ☒ Send Forward ☒ Close Cases ... More Options

2 of 2 cases

Filtered By: Active Cases

Name	Type	Template Name	Status
☐ Sammy Spartan Hospitality, Tourism & Event M	Review	Promotion to Full	
Step 1 of 10: Faculty Services			
☒ Sammy Spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Case is with candidate			

San José State University > Cases >

Sammy Spartan

Unit

Accounting & Finance

Template

Annual Evaluation (Committee) - College of Business -

Accounting and Finance

Send Case

Case Options

Forward to
Department Assisted Document Upload

Select Status

☐	Sammy Spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance
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Step 1 of 4: Department Assisted Document Upload

The case for Sammy Spartan is now in Step 1 - Faculty can upload documents in Faculty180, or reach out to Dept. admins for additional assistance.



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.

Per 15.12(a) of the CSU-CFA Agreement, departments are responsible for providing required materials not accessible to the employee. This often means providing the official direct observation of teaching to the faculty member to upload.

Reach out to Faculty Services for assistance. Scott Nguyen, Temporary Faculty Evaluations Analyst, is primary contact: Scott.nguyen01@sjsu.edu --please cc: eFaculty@sjsu.edu; ph: 4-2204.

The FS staff monitored inbox is the preferred contact point; Faculty should **always** be instructed to send requests to it: eFaculty@sjsu.edu.

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



[Link to Template](#)

Subject: Annual Evaluation Case Created

Message:

Dear Lecturer,

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. **[Due Date]** 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](mailto:EFaculty@sjsu.edu)/scott.nguyen01@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](https://one.sjsu.edu) and select the [eFaculty tile](#)).

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



Template: Cumulative Evaluation

[Link to Template](#)

Subject: Cumulative Evaluation

Message:

Dear Lecturer,

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. **[Due Date]** 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:

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- [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.



Template: Annual Sending to Committee

[Link to Template](#)

Subject: Annual Evaluation Case is available for Review

Message:

Dear Committee Members, Chair: (This vary, depending on the Faculty and Committee type)

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.



Template: Cumulative Sending to Committee for College Review

[Link to Template](#)

Subject: Cumulative Case ready for your Ready

Message:

Dear Committee Members:

This cumulative evaluation case 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.

The appropriate administrator must review the faculty member's Personnel Action File (PAF) before making their decision. To review the PAF:

1. Follow the link to the PAF Log Sheet available in Case Materials. Submit your view of the PAF in the OnBase form that opens. Instructions for logging your view of the PAF are available [here](#).
2. For your convenience, the PAF has been uploaded to this case in eFaculty under the area named Dean or Appropriate Administrator--the file name begins with, "UP Personnel Packet."

After reviewing the Cumulative Evaluation materials and the PAF, please complete the evaluation form under "Case Details" (Annual Evaluation Form - Dean).



Questions or need 1 on 1 assistance, please contact:

eFaculty@sjsu.edu
scott.nguyen01@sjsu.edu
x4-2204

Open Lab Schedule:

Tuesday 2pm - 3pm : <https://sjsu.zoom.us/j/83578498656>

Thursday 9am - 10am : <https://sjsu.zoom.us/j/83578498656>



- Annual: Spring 25 - Fall 25
- Cumulative: 3 year - Fall 2023 - Spring 26
- Cumulative: 6 year - Fall 2020 - Spring 26 (Include Covid Memo)
- Previous year below

- Annual: Spring 24 - Fall 24

- Cumulative: 3 year - Fall 2022 - Spring 25

- Cumulative: 6 year - Fall 2019 - Spring 25 (Include Covid Memo)

