

# Annual & Cumulative Evaluations: Case Creation

*Scott Nguyen  
Faculty Services  
University Personnel*

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- 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



| <b>Evaluation Selection Criteria</b> |  |
|--------------------------------------|--|
| Annual Evaluation                    | <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>   |
| Committee                            | <p><b>"Faculty with a 1.0 FTE</b> 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)."</p> <p style="text-align: center;"><a href="#">Annual Evaluation (Committee) - College of Business - Accounting and Finance</a></p> |
| No Committee                         | <p>Faculty who are Part-Time <b>under 1.0 FTE</b>, Please select, No Committee.</p> <p style="text-align: center;"><a href="#">Annual Evaluation (No Committee) - College of Business - Accounting and Finance</a></p>   |



## Cumulative Evaluation

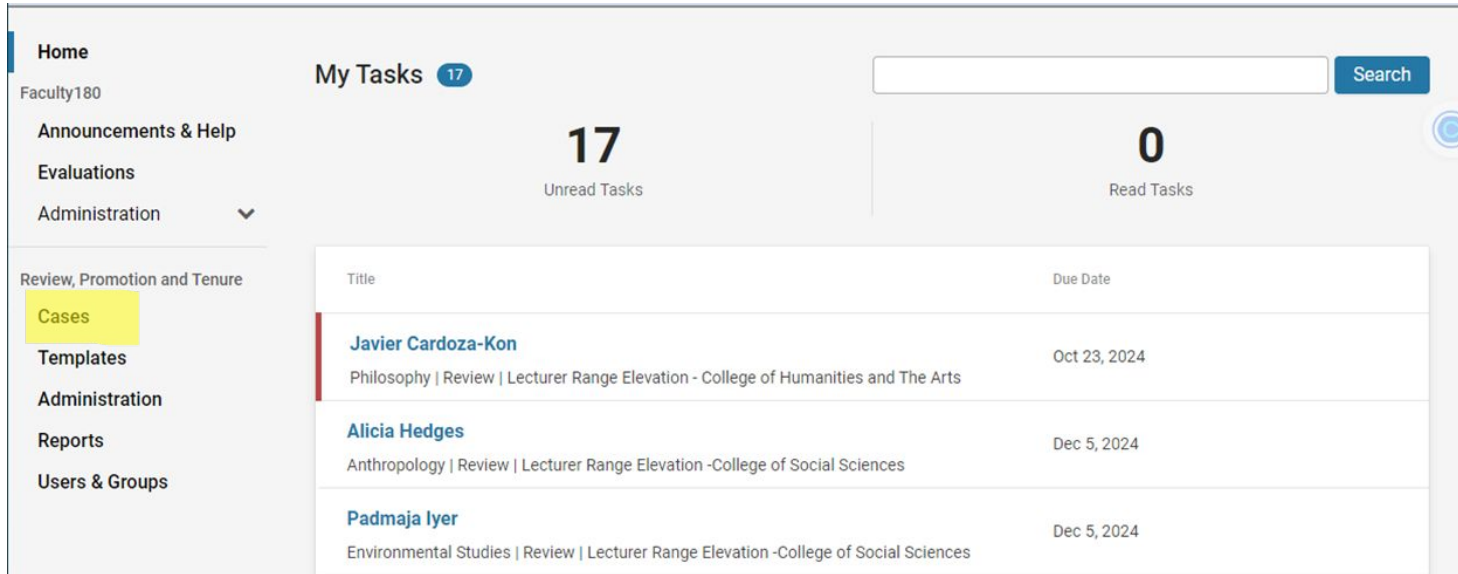
Consideration for new or renewed three-year appointments (“entitlement”) can only be made after faculty undergo cumulative evaluation.

- 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 |  |
|-------------------------------|--|
| <b>Cumulative Evaluation</b>  | <p>Consideration for new or renewed three-year appointments (“entitlement”) can only be made after faculty undergo cumulative evaluation.</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Renewals follow three consecutive years of an appointment, with review occurring in spring of the 3rd or subsequent year.</li> </ul> |
|                               | <p><b>Cumulative Evaluation - College of Business - Accounting and Finance</b></p>   |



To create a new case for faculty. Please click on **CASES**, in the main page.



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

My Tasks **17**  
Unread Tasks

**0**  
Read Tasks

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



# Step 2: Select “Create Case”

Click “Create Case”  
HERE



SJSU | eFACULTY Scott Nguyen ▾

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San José State University >

## Cases

Search cases

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4 of 4 cases

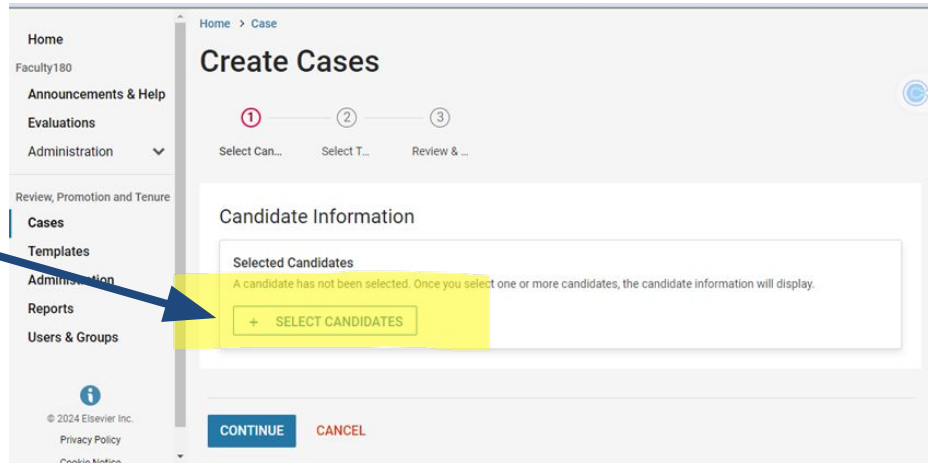
Filtered By: Active Cases ✕ Closed Cases ✕ [Reset Filters](#)

| Name ▾ | Type ⇅ | Template Name ⇅ | Status ⇅ |
|--------|--------|-----------------|----------|
|--------|--------|-----------------|----------|



# Step 3A: Please click, “Select Candidates”

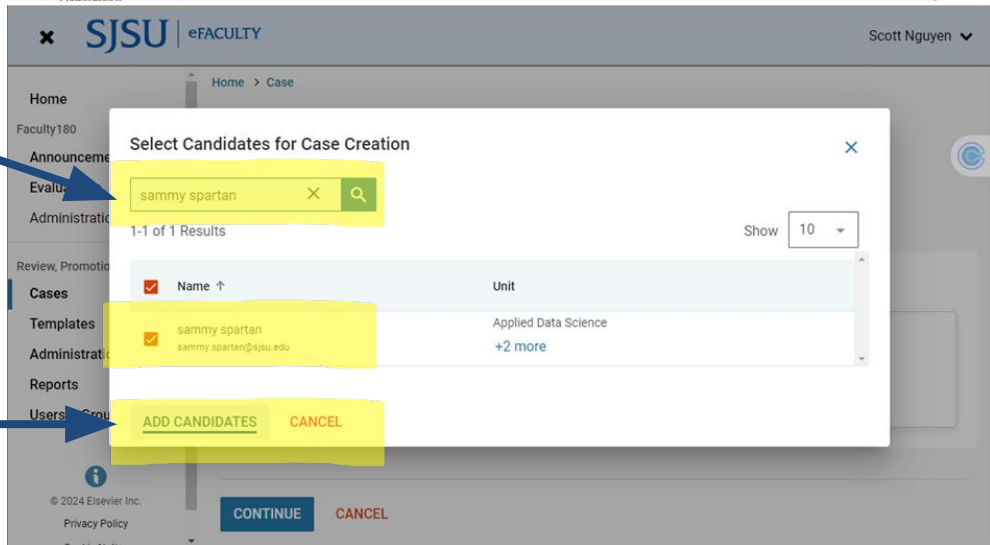
Step 3A:  
Please click,  
“+ Select Candidates”



Step 3: Part B  
Enter in the Faculty Name

Please make sure to Check the  
red Box.

Click, “Add Candidate”





# Step 3B: Please 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. At the top, there is a search bar containing the text "sammy spartan" with a search icon to its right. 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". A red checkbox is checked in the "Name" column. At the bottom of the modal, there are two buttons: "ADD CANDIDATES" (highlighted in yellow) and "CANCEL". The background shows the eFACULTY navigation menu with options like Home, Faculty180, Announcements, Evaluations, Administrative, Review, Promotion, Cases, Templates, Administrative, Reports, and Users & Groups. The user's name "Scott Nguyen" is visible in the top right corner.

| <input checked="" type="checkbox"/> | Name ↑                                  | Unit  |
|-------------------------------------|---|---|
| <input checked="" type="checkbox"/> | sammy spartan<br>sammy.spartan@sjsu.edu | Applied Data Science<br><a href="#">+2 more</a> |



•Step : Once the Faculty has been selected.

Click Continue, to proceed to the next page.



Home > Case

### Create Cases

1 — 2 — 3

Select Cand... Select Te... Review & S...

#### Candidate Information

Selected Candidates

1-1 of 1 Results Show 10

| Candidate ↑                                | Unit ↑                          |
|--|---------------------------------|
| SS sammy spartan<br>sammy.spartan@sjsu.edu | Applied Data Science<br>+2 more |

+ SELECT CANDIDATES

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**CONTINUE** CANCEL



Step 5: Please select the Department for the Faculty

Please Select “Reappointment” for the type.

**\*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.

Home > Case

## Create Cases

1 2 3

Select Candidate... Select Templ... Review & Setti...

### Select Case Settings

**Unit for Case(s) \***  
Cases can only be created in one unit.  
Accounting & Finance

**Type**  
Reappointment



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

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

x 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                          |
|-----------------------|--|---------------------------|-------------------------------|
| <input type="radio"/> | <b>Custom Case</b><br>Create a unique case by customizing forms and workflow steps rather than using a template.   |                           |                               |
| <input type="radio"/> | <b>Annual Evaluation (Committee) - College of Business - Accounting and Finance Committee</b> (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      | <a href="#">Reappointment</a> |
| <input type="radio"/> | <b>Annual Evaluation (No Committee) - College of Business - Accounting and Finance Committee</b> (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      | <a href="#">Reappointment</a> |
| <input type="radio"/> | <b>Cumulative Evaluation - College of Business - Accounting and Finance Committee</b> (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      | <a href="#">Reappointment</a> |
| <input type="radio"/> | <b>Annual Evaluation (Committee) - College of Business- Dean's Office Only Committee</b> (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       | <a href="#">Reappointment</a> |
| <input type="radio"/> | <b>Annual Evaluation (No Committee) - College of Business- Dean's Office Only Committee</b> (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       | <a href="#">Reappointment</a> |
| <input type="radio"/> | <b>Cumulative Evaluation - College of Business- Dean's Office Only Committee</b> (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       | <a href="#">Reappointment</a> |
| <input type="radio"/> | <b>Test Only Annual Evaluation (No Committee) - College of Engineering (copy) Committee</b> (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 | <a href="#">Reappointment</a> |

# Step 7: Set Deadline 1/31/25

Step 7: Enter 1/31/2025.

This is the packet submission date for Faculty.

Please update the “Faculty Activity Time”

Term Ranges on Pg.22

Home > Case

## Create Cases

Faculty180

Announcements & Help

Evaluations

Administration

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

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Home > Case

### Create Cases

Progress: 1/31/25

Select Candidate(s) | Select Template | Review & Settings

#### Review & Settings

**Case Information**

Unit for Case(s) \* | Type

Accounting & Finance | 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

- 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

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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](mailto:efaculty@sjsu.edu)/[scott.nguyen01@sjsu.edu](mailto:scott.nguyen01@sjsu.edu) and [help@interfolio.com](mailto: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](#) file).

P - SPAN

POWERED BY TINY

858/6000 characters

PREVIEW

CREATE 1 CASE

PREVIOUS

CANCEL

## Sending the case to the CANDIDATE for ANNUAL EVALUATION

**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. **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](mailto:eFaculty@sjsu.edu)/[scott.nguyen01@sjsu.edu](mailto:scott.nguyen01@sjsu.edu) and [help@interfolio.com](mailto: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.



## Sending the case to the CANDIDATE for CUMULATIVE EVALUATION

**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. **March 17, 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](mailto:eFaculty@sjsu.edu) and [help@interfolio.com](http://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](http://one.SJSU.edu) and select the [eFaculty tile](#)).

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





## Sending the case to the Reviewers for Annual or Cumulative Evaluation

**Subject:** Annual Evaluation Case is available for Review  
Cumulative Evaluation Case is available for Review.

**Message:**

Dear Committee Members: Or Dear Chair: (This vary, depending on the Faculty and the Stage of the review)

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.



## Sending Cumulative Evaluation to the College Level

**Subject:** Cumulative Case ready for your Ready

**Message:**

Dear Dean,

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).



# 10-Day Optional Response

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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 **[Add Date]**. 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:

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

Help for providing an optional response can be found at the following link:

<https://product-help.interfolio.com/candidate/view-and-respond-to-files-shared-with-you-by-a-committee-rebuttal>



**\*\*[Annual & Cumulative Calendar AY24-25](#) - Please review calendar for all dates and deadlines.**

## Annual:

- Annual Case Creation open 12/2/24 - 1/24/25
- **Important Note:** \*\*Please make sure to create cases as early as possible to help prevent delays in faculty submissions. Faculty will require time to review their vitae to ensure all documents are uploaded. If any documents are missing, please contact [eva.momoki@sjsu.edu](mailto:eva.momoki@sjsu.edu) and [efaculty@sjsu.edu](mailto:efaculty@sjsu.edu) to request the necessary materials.\*\*
- Step 1: Friday 1/31/25 - All Packet Submissions Due - Regenerated and Locked
- Step 2: Wednesday 2/26/2025 - Submit Department Level Review - Committee and Chair
  - Send 10-day Optional Response
- Step 3: Tuesday 4/8/2025 - Submit College Level Evaluation
  - Send 10-day Optional Response
- Step 4: Thursday 4/10/2025 - Send to Faculty Services



**\*\*[Annual & Cumulative Calendar AY24-25](#) - Please review calendar for all **dates and deadlines.****

## Cumulative:

- \*Case creation End Date: Monday 3/10/2025
- **Important Note:** \*\*Please make sure to create cases as early as possible to help prevent delays in faculty submissions. Faculty will require time to review their vitae to ensure all documents are uploaded. If any documents are missing, please contact [eva.momoki@sjsu.edu](mailto:eva.momoki@sjsu.edu) and [efaculty@sjsu.edu](mailto:efaculty@sjsu.edu) to request the necessary materials.\*\*
- Step 1: Monday 3/17/2025 - Submit Cumulative Packet Evaluation
- Step 2: Wednesday 4/9/25 - Submit Department Level Review - Committee and Chair
  - Send 10-day Optional Response
- Step 3: Friday 5/16/25 - Submit College Level Evaluation
  - Send 10-day Optional Response
- Step 4: Tuesday 5/20/25 - Send to Faculty Services



- Annual: Spring 24 - Fall 24
- Cumulative: 3 year - Fall 2022 - Spring 25
- Cumulative: 6 year - Fall 2019 - Spring 25 (Include Covid Memo)



Questions or need 1 on 1 assistance, please contact:

[eFaculty@sjsu.edu](mailto:eFaculty@sjsu.edu)

[scott.nguyen01@sjsu.edu](mailto:scott.nguyen01@sjsu.edu)

[Open Lab Schedule:](#)

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

Thursday 11am - 12pm : <https://sjsu.zoom.us/j/83578498656>

By Phone: x4-2204



Demonstration of case creation in eFaculty

