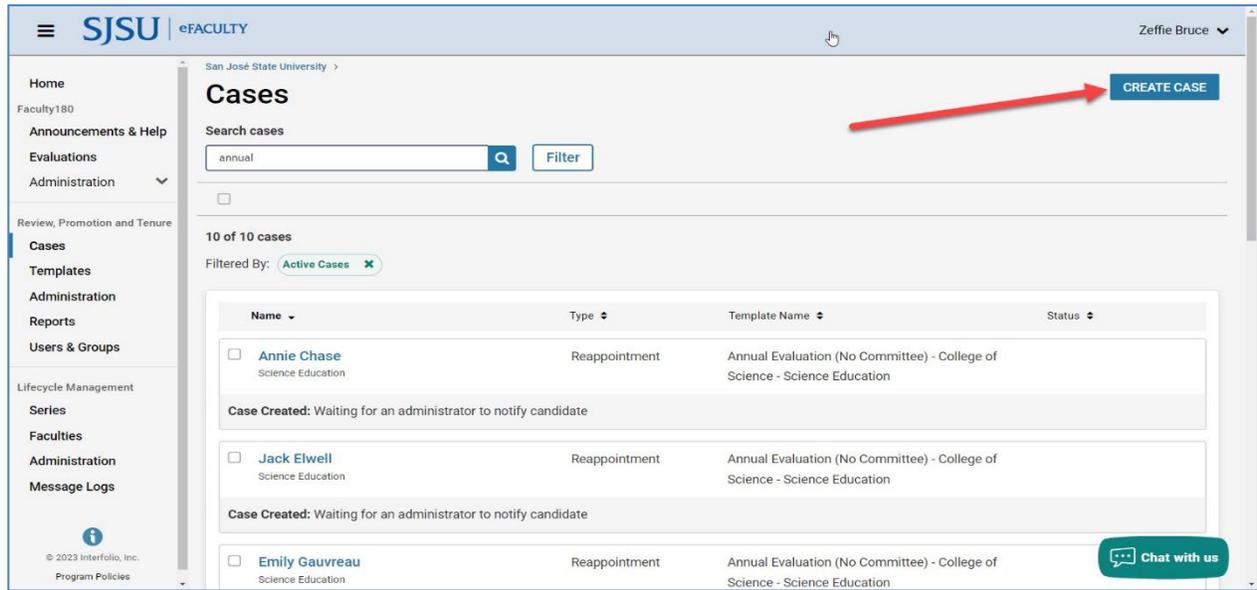


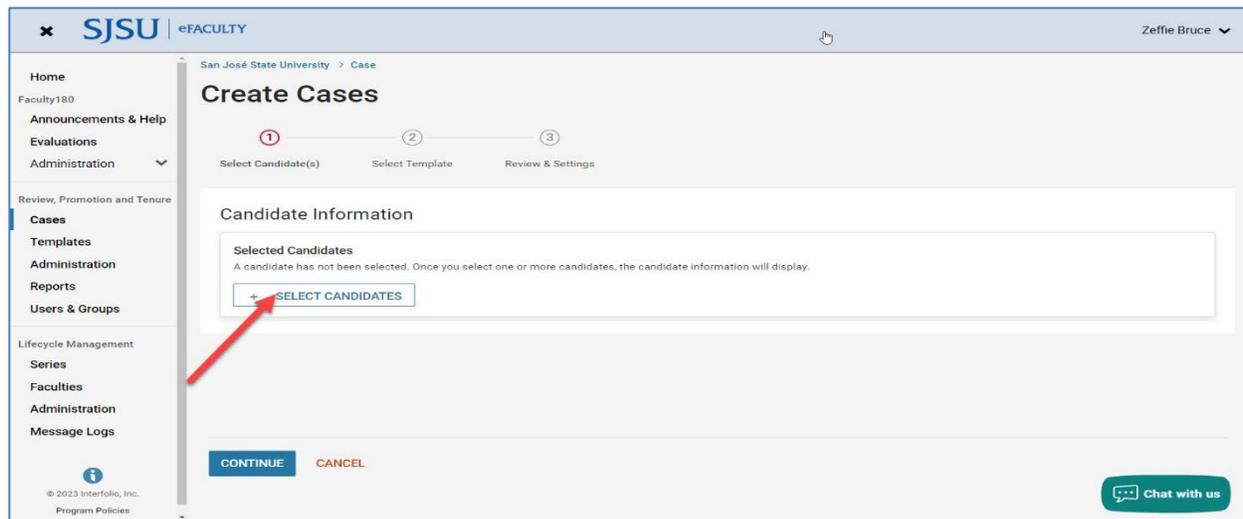
HOW TO CREATE ANNUAL & CUMULATIVE CASES

eFaculty supports creating cases in bulk. Individual cases may also be created following these steps. Follow these instructions to create one or multiple cases:

1. On the left-hand side, select "Cases". Next, select "Create Case"

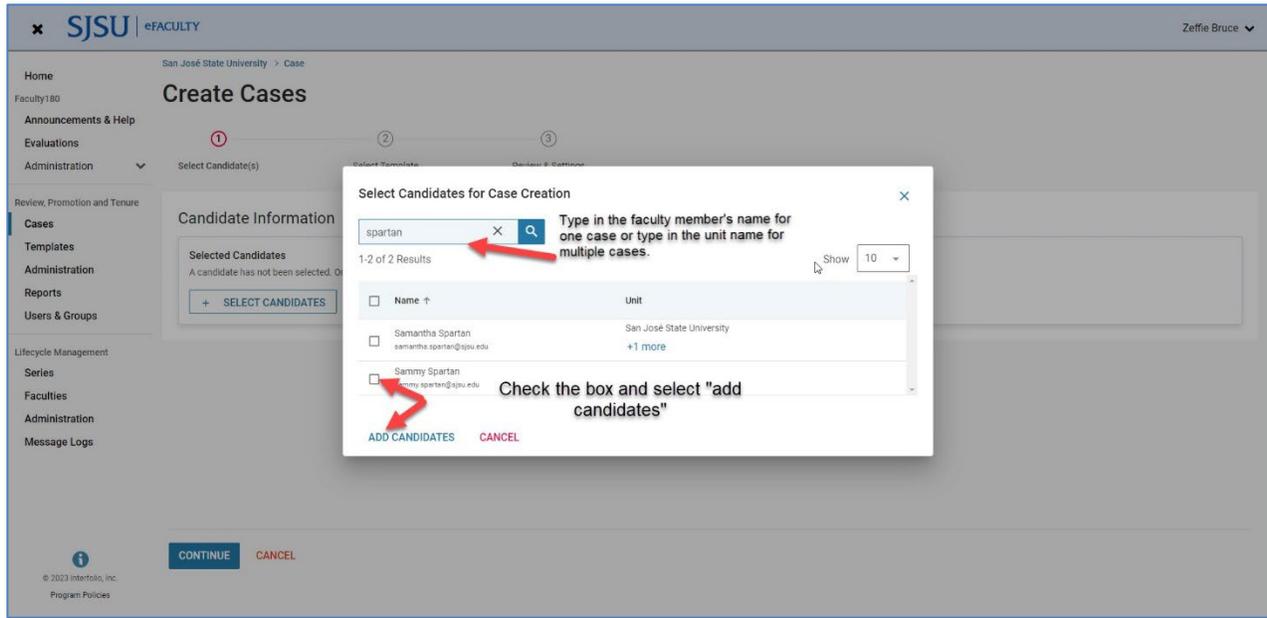


2. Under "Candidate Information," select candidates and then select continue

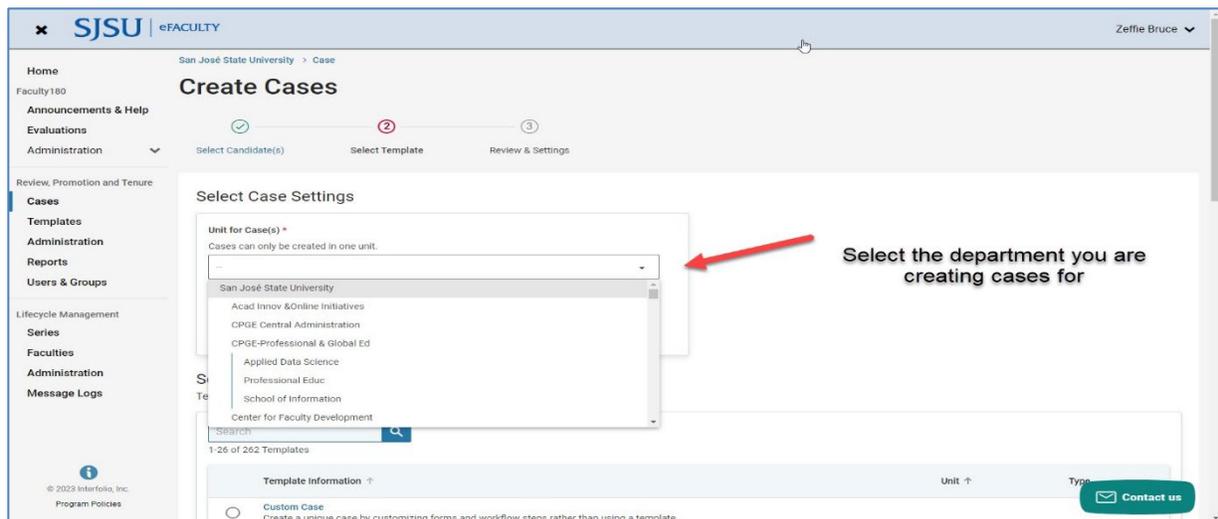


- If creating only one case, type the name of the faculty member. If creating multiple cases, type in the department name and check the box for each faculty member you are making cases for. Select "Continue" to move to the next step.

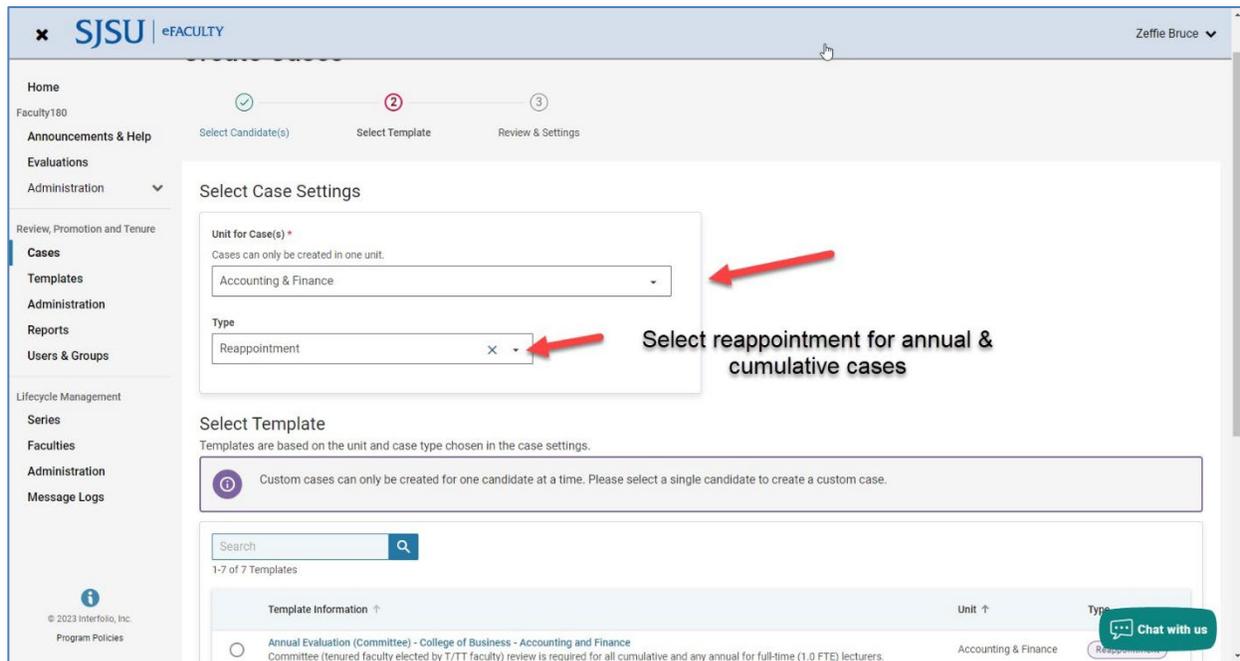
Tip: Try first name if the last name doesn't work in the search. If not found at all, contact efaculty@sjsu.edu



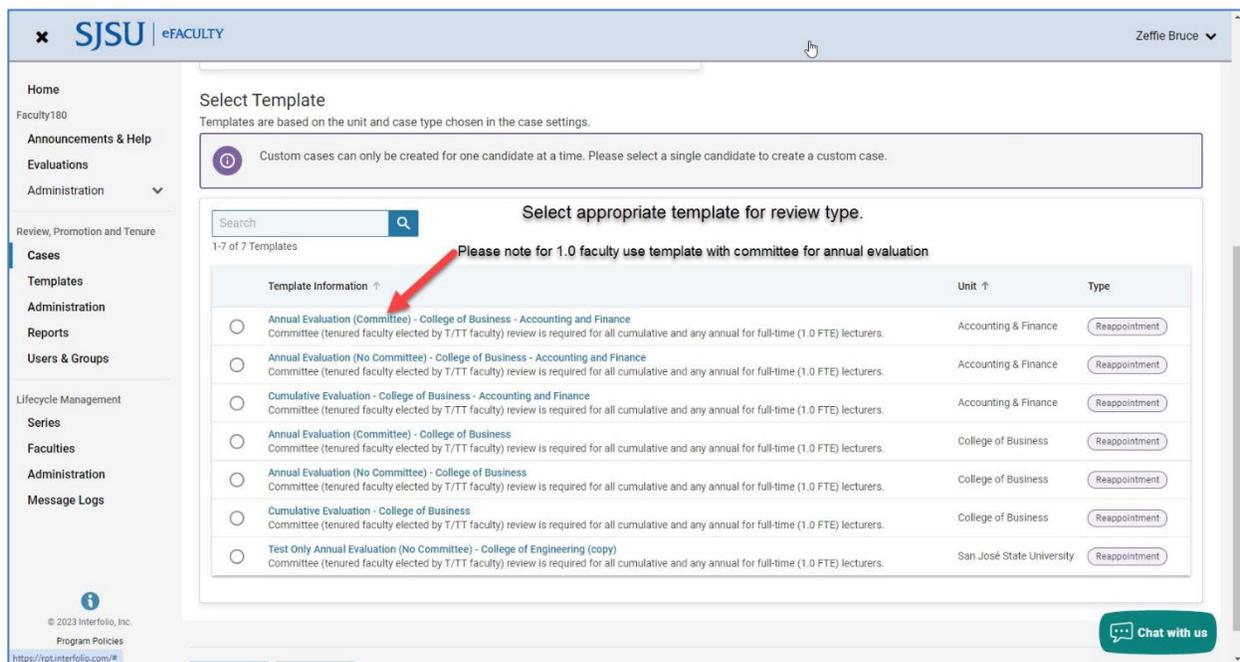
- Select the department (or college) with which you are associated. If your department is not listed, please contact UP-FS directly at efaculty@sjsu.edu.



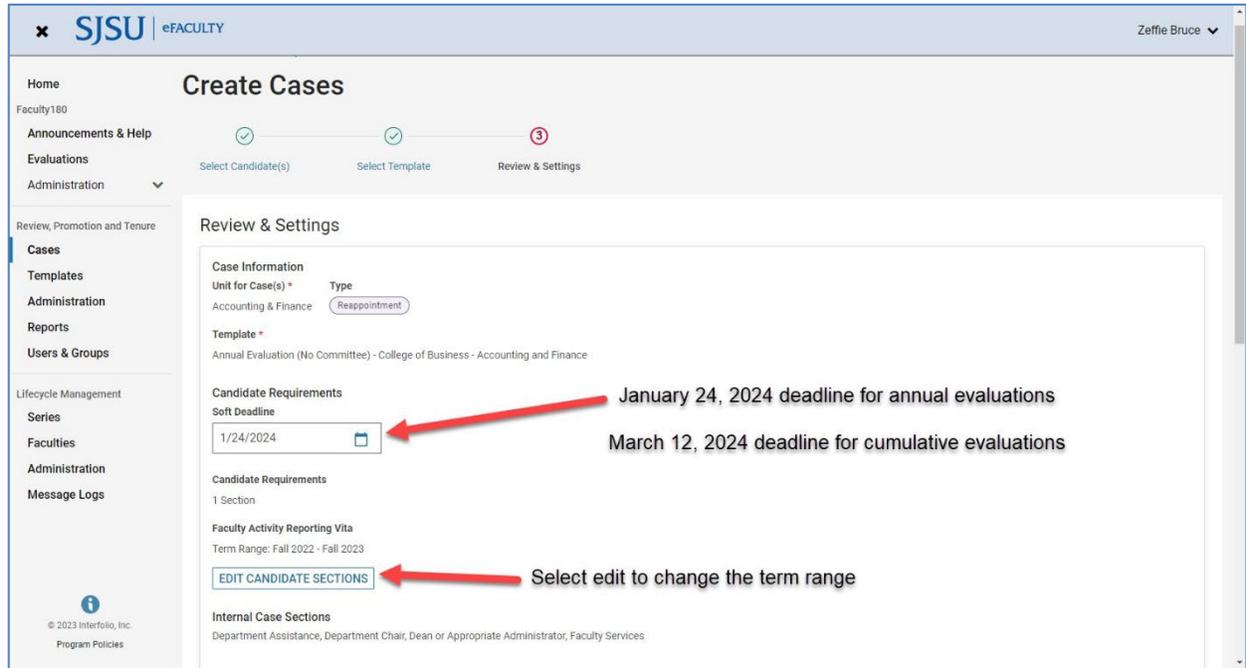
- The eFaculty "type" for Annual and Cumulative evaluation will be "Reappointment." Select "Reappointment."



- Select the appropriate template associated with the review type and the college or department: Annual Evaluation (Committee) Annual Evaluation (No Committee) Cumulative Evaluation Select "Continue" to move to the next step.



- 7. Add the deadline date for submitting the evaluations.
Annual Evaluations- 1/24/2024
Cumulative Evaluations- 03/12/2024.
Next, move to the "Edit Candidate Sections" and select to edit the term range.



8. **Annual evaluation:** typically, the prior calendar year starting with Winter to fall of the prior calendar year.

Cumulative evaluation: Initial 3-year appointment: typically, the prior six academic years, from the start semester to the current spring semester

Term Range for AY 23-24 - 6 years
Fall 2018-Spring 2024

Renewal 3-year appointment: typically, the prior 3 academic years, first fall through the current spring semester of the current appointment

Term Range for AY 23-24 -3 years
Fall 2021-Spring 2024

The screenshot displays the SJSU eFACULTY interface. The main content area shows the 'Case Information' section for a 'Reappointment' case in the 'Accounting & Finance' unit. The 'Candidate Requirements' section is active, showing a soft deadline of 1/24/2024. A dialog box titled 'Edit Candidate Sections' is overlaid on the right side. This dialog box contains the following information:

- Vita Name:** Faculty180 Vita
- Vita Name:** Annual and Cumulative Evaluation of Lecturers
- Unit:** University
- Term Range:** Select the term range (time period) for the vitae.
 - Start Term *:** Winter
 - Start Year *:** 2023
 - End Term *:** Fall
 - End Year *:** 2023
- Other Documents (Optional):**
 - Due Date:** Choose a date

At the bottom of the dialog box, there are 'SAVE' and 'CANCEL' buttons. A red arrow points to the 'SAVE' button. Another red arrow points to the 'Start Term' dropdown menu, which is set to 'Winter'. The background interface shows the 'Case Information' section with various tabs and buttons, including 'EDIT CANDIDATE SECTIONS' and 'EDIT STEP DUE DATES'.

- 9. Select "Yes," so the candidate can submit materials online through eFaculty. Do not notify the candidate now, instead select "Create Case"

