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:

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Home	San José State University >									
Faculty180	Cases			CREATE CASE						
Announcements & Help	Search cases									
Evaluations	annual	Q Filter								
Administration 💙										
Review, Promotion and Tenure										
Cases	10 of 10 cases									
Templates	Filtered By: Active Cases X									
Administration Reports	Name 🖌	Туре 🗢	Template Name 🗘	Status 🕈						
Users & Groups	Annie Chase Science Education	Reappointment	Annual Evaluation (No Committee) - College of Science - Science Education							
Series	Case Created: Waiting for an administrate	or to notify candidate								
Faculties										
Administration	Jack Elwell	Reappointment	Annual Evaluation (No Committee) - College of							
Message Logs			Science - Science Education							
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© 2023 Interfolio, Inc.		Reappointment	Annual Evaluation (No Committee) - College of	Chat with us						
© 2023 Interfolio, Inc. Program Policies	Emily Gauvreau Science Education	Reappointment	Annual Evaluation (No Committee) - College of Science - Science Education	Chat with us						
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€ 2022 Interfolio, Inc. Program Policies Under "Cand × SJSU Home Faculty 180 Announcements & Help Evaluations Administration ~	Emily Gauvreau Science Education	Reappointment elect candidates a 3 Review & Settings	Annual Evaluation (No Committee) - College of Science - Science Education	Zeffie Bruce 🗸						
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3. 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 <u>efaculty@sjsu.edu</u>

Home	San José State University > Case				
Faculty180	Create Cases				
Announcements & Help					
Evaluations	0				
Administration 🗸 🗸	Select Candidate(s)	Calant Tampiata	Daview 9 Cattings		
Deview Promotion and Tenure		Select Candidates for Case	e Creation	×	
Cases	Candidate Information		Type in the faculty member's name for		
Templates		spartan	one case or type in the unit name for		
Administration	A candidate has not been selected. Or	1-2 of 2 Results	multiple cases.	Show 10 -	
Reports		Name &	Unit		
Users & Groups	+ SELECT CANDIDATES		Unit		
-		Samantha Spartan	san José State University +1 more		
Lifecycle Management		Sammy Spartan			
Faculties		C C	heck the box and select "add		
Administration			candidates"		
Message Logs		ADD CANDIDATES CANCE	L		
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0	CONTINUE CANCEL				

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

Home Faculty180 Announcements & Help Evaluations Administration	San José State University > Case Create Cases	
keview, Promotion and Tenure Cases Templates Administration Reports Users & Groups Jifecycle Management Series Faculties Administration Message Logs	Select Case Settings Unit for Case(s)* Cases can only be created in one unit. San José State University Acad Innov Kollinie Initiatives CPGE Central Administration CPGE-Professional & slobal Ed Applied Data Science Professional Educ School of Information	Select the department you are creating cases for
€ 2023 Interfolio, Inc. Program Policies	Center for Faculty Development Search 1-26 of 262 Templates Template Information Custom Case Coreate a unique case by customizing forms and workflow steps rather than using a tem	Unit ↑ Type Contact us

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

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Home aculty180 Announcements & Help Evaluations	Select Candidate(s)	(2) Select Template	(3) Review & Settings			
Administration 🗸	Select Case Set	tings				
eview, Promotion and Tenure	Unit for Case(s) * Cases can only be create	ed in one unit.				
Templates Administration	Accounting & Finance	ce				
Reports Users & Groups	Reappointment		× •	Select reappointmen cumulative	nt for annual & cases	
ifecycle Management Series Faculties	Select Template	e the unit and case type ch	osen in the case settings.			
Administration Message Logs	O Custom case	es can only be created for	one candidate at a time. Plea	se select a single candidate to create a custo	om case.	
	Search 1-7 of 7 Templates	٩				
					10.0	
© 2023 Interfolio, Inc.	Template In	formation 1			URIT T	туре

6. 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.

Home			
incultr/180	Select Template		
Announcements & Help	Templates are based on the unit and case type chosen in the case settings.		
Fundancements & Help	Custom cases can only be created for one candidate at a time. Please select a single candidate to create a custom case.		
Evaluations	•		
Administration V	Colort en remiete templete for review trac		
Review. Promotion and Tenure	Search Q Select appropriate template for review type.		
Cases	1-7 of 7 Templates Please note for 1.0 faculty use template with committee for annual evaluation		
Templates			
Administration	Template Information T	Unit T	Type
Demoste	Annual Evaluation (Committee) - College of Business - Accounting and Finance	Accounting & Finance	Reappointment
Reports	 Committee (tenured faculty elected by 1/11 faculty) review is required for all cumulative and any annual for full-time (1.0 FTE) lecturers. 		
Users & Groups	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
Lifecycle Management	Cumulative Evaluation - College of Business - Accounting and Finance	Accounting & Finance	(Reappointment)
Series	Annual Evolution (Committee) College of Buckeyse		
Faculties	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
Administration Message Logs	Annual Evaluation (No Committee) - College of Business 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 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
	Committee (terured 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
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 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.

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Home aculty180	Create Cases		
Announcements & Help	\odot — \bigcirc — \bigcirc — \bigcirc	3	
Evaluations Administration	Select Candidate(s) Select Template Revie	w & Settings	
eview, Promotion and Tenure	Review & Settings		
Cases Templates	Case Information		
Administration	Unit for Case(s) * Type Accounting & Finance (Reappointment)		
Reports	Template *		
Users & Groups	Annual Evaluation (No Committee) - College of Business - Accountin	ig and Finance	
ifecycle Management	Candidate Requirements Soft Deadline	January 24, 2024 deadline for annual evaluations	
Faculties	1/24/2024	March 12, 2024 deadline for cumulative evaluations	
Administration	Candidate Requirements		
Message Logs	1 Section		
	Faculty Activity Reporting Vita		
	Term Range: Fall 2022 - Fall 2023		
-	EDIT CANDIDATE SECTIONS	Select edit to change the term range	
© 2023 Interfolio Inc	Internal Case Sections		
Program Policies	Department Assistance, Department Chair, Dean or Appropriate Adm	ninistrator, Faculty Services	

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

	Case Information		✓ Faculty180 Vita
Home aculty180 Announcements & Help Evaluations Administration veriew, Promotion and Tenure Cases Templates Administration Reports Users & Groups	Unit for Case(s) * Type Accounting & Finance Reappointment Template * Annual Evaluation (No Committee) - College of Business - Accounting and Finance Candidate Requirements Soft Deadline 1/24/2024 Candidate Requirements 1 Section Faculty Activity Reporting VIta Term Range: Fall 2022 - Fall 2023	Select Winter 2023	Vita Name Annual and Cumulative Evaluation of Lecturers Unit University Term Range Select the term range (time period) for the vitae. Start Term * Winter * 2023 * End Term * Fail
ifecycle Management Series Faculties Administration Message Logs	EDIT CANDIDATE SECTIONS Internal Case Sections Department Assistance, Department Chair, Dean or Appropriate Administrator, Faculty Services Case Review Steps 4 Steps EDIT STEP DUE DATES		Other Documents (Optional) Due Date Choose a date
•	Candidates	Select Save	
© 2023 Interfolio, Inc.	✓ Candidate List		
Program Policies			SAVE CANCEL

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

Home	EDIT STEP DUE DATES		
culty180 Announcements & Help	Candidates		
Evaluations	✓ Candidate List		
Administration 🗸			
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Cases	(SS) Samantha Spartan	San José State University	
Templates	samantna.spartangajsu.euu	+1 more	
Administration			
Reports	Settings		
Users & Groups			
	Will the candidate be involved in this evaluation?*		
ecycle Management	This setting cannot be changed after this step. Learn more about candidat	e involvement.	
Series	O No		
Faculties			
Administration	Would you like to notify the candidates now? *		
Message Logs	An automatic notification will be sent to the candidate after the case is cre	ated with instructions for uploading and submitting materials online.	
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