

TABLE OF CONTENTS

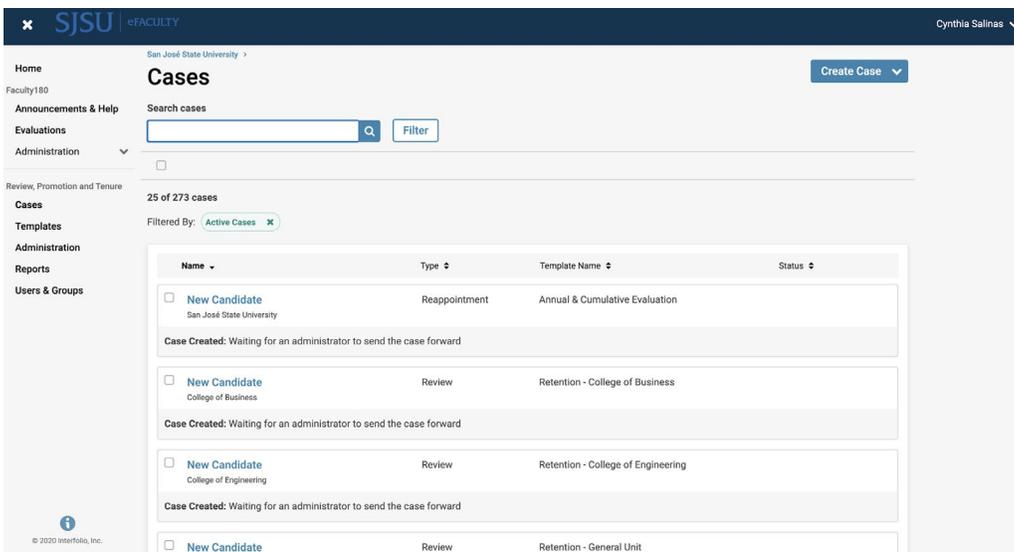
KEY TERMS TO KNOW	2
eFACULTY COMMITTEE MEMBER ROLE & TASKS	4
LOGGING IN	5
VIEW AND MANAGE CASE LIST	6
USING THE DOCUMENT READER	7
COMMENTS FOR OTHER COMMITTEE MEMBERS (CHAT)	8
COMMITTEE MANAGER - DESIGNATING A NEW MANAGER	10
COMMITTEE MANAGER - SUBMITTING FORMS	12
SENDING THE REVIEW TO THE CANDIDATE (OPTIONAL RESPONSE)	14
MOVING THE CASE FORWARD	16
MORE HELP	17

This guide is for Committee Members using the eFaculty system to review colleagues. It explains the setup and management of cases using eFaculty, and it details how to fill out and submit the required forms.

WHAT IS eFACULTY?

eFaculty is the suite of software from the vendor, Interfolio, which allows faculty to organize a digital portfolio that can be passed through a structured review process. We use eFaculty to help faculty efficiently upload evidence of their performance electronically, and to help reviewers adhere to policies while conducting reviews of their peers. eFaculty’s functions include:

- **Accepting and storing file uploads and case materials from candidates,** and displaying them in an organized manner in Faculty180 or Faculty Activity Reporting.



- **Establishing review levels and reviewer assignments in RPT,** recommendations are recorded and distributed along the way

- **Storing digital copies of reviews.**

- **Facilitating communication** between Faculty, reviewers, and department and college Administrators during

the review process.

KEY TERMS TO KNOW

- **Interfolio:** Vendor for eFaculty. Interfolio is a secure online solution to help higher education with faculty evaluation workflow. Interfolio helps academic institutions ensure that these processes are transparent, equitable, efficient, and well documented.
- **eFaculty:** SJSU has branded its Interfolio product suite as eFaculty. In this guide, “eFaculty” and “Interfolio” are often used interchangeably.

- **Faculty180/Faculty Activity Reporting (FAR):** Two names used interchangeably. FAR is the area in eFaculty where faculty upload their review materials. The review module (RPT) pulls information--by date range and review type--out of FAR. This area is available 24/7 for faculty to input their activities.
- **Review, Promotion & Tenure (RPT):** The eFaculty module used for the faculty review process, delivering FAR data to reviewers as scheduled, and recording recommendations and decisions. Provides a platform for distributing recommendations and taking responses from faculty. (The reviewers' portion of Annual and Cumulative evaluation of Temporary Faculty will be conducted within the RPT module).
- **Annual and Cumulative Evaluations:** Annual Evaluations are required for all temporary faculty at least once during their appointment period. Cumulative Evaluations are required for initial and renewal, three-year appointments. Annual and Cumulative evaluations are conducted during the Spring Semester. For more information, visit the [Periodic Evaluations-Lecturers Instructions](#) and the [Periodic Evaluations-Lecturers Calendar](#).
- **Candidate:** eFaculty refers to the individual being reviewed as a Candidate. "Candidate" and "Temporary Faculty" will be used interchangeably.
- **eFaculty Administrators:** Highest access level of a department within the RPT module. eFaculty Administrators can access documents, e-mail candidates and committees, and move a case forward and backward. They can also create standing committees. **Note:** *A eFaculty Administrator will have access to settings, cases, and committees for an individual department. eFaculty Administrators are entrusted to maintain confidentiality and report any misuse of the platform.*
- **Packet:** The collection of materials to be reviewed. Typically, this is drawn from Faculty180
- **Dossier:** Pronounced "dāsē.ā ." Area within eFaculty for all faculty to store and manage career information (e.g., fellowships, student evaluations, publications, evaluations) in one place. The Dossier is a collection of materials from which a packet may be derived and submitted for review. Packets submitted in RTP are commonly called "the dossier."
- **Committees:** Groups of users (or individuals) that can review cases at a given step of the review process. There are two types of committees: 1.) *Standing Committees*, which are set up outside of the cases so they can populate to multiple cases and 2.) *Ad Hoc Committees*, which can be set at multiple steps within a single case. **Note:** *Committees for Annual and Cumulative evaluations will be set up as Standing*

Committees. Individual reviewers (e.g., chairs, deans) are situated in committees to allow assistants to be committee members to act on behalf of their office.

- **Manager:** The individual committee member responsible for submitting the official documents and/or forms for the review committee or an individual reviewer. There should be only one manager per committee. Department and college committee chairs will likely serve as manager for the committee.
- **Case:** Any faculty member's packet of materials undergoing a particular review process.
- **Template:** Review structure (i.e., steps, reviewers, forms) created in eFaculty that serves as the foundation for creating cases for a particular review type. All cases should be set up using an established template for the review type (e.g., annual evaluation) in a division (e.g., Chemistry Department). Templates provide policy compliant review platforms, and they make creating cases easier and more efficient.
- **Case Materials:** The contents of a case are organized into sections, which can be submitted by the temporary faculty for review. The eFaculty Administrator can lock or unlock a section for editing as needed. There are three types of sections within Interfolio:
 - 1) Faculty Documents - any documentation that the temporary faculty adds for review
 - 2) Committee Documents - any documentation that a eFaculty administrator adds for only committee members to view, or items uploaded by reviewers such as memos.
 - 3) Forms - Standard questionnaires to collect specific information from the faculty candidate or committee members. Committee forms must be completed by the members and/or manager for a review to move forward.
- **Case Steps:** After the temporary faculty organizes content into a packet and submits it for review, it goes through a review workflow. Each reviewer will be located in a case step, and will have access to materials until the case moves to the next step.
- For additional terms, visit [Glossary of Terms](#).

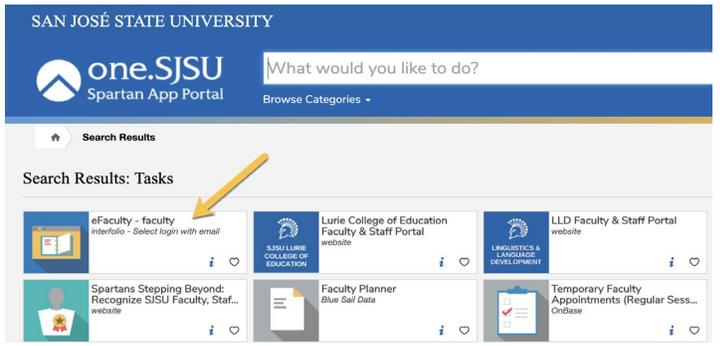
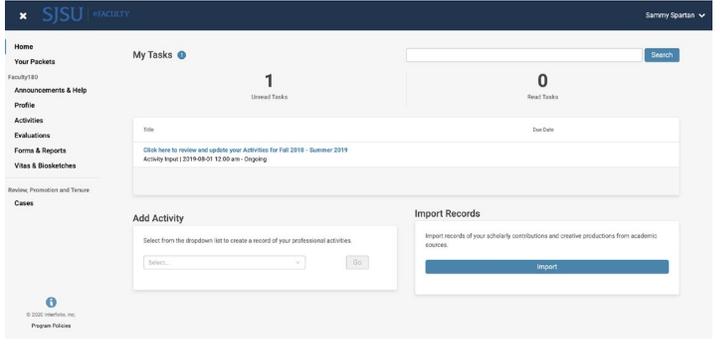
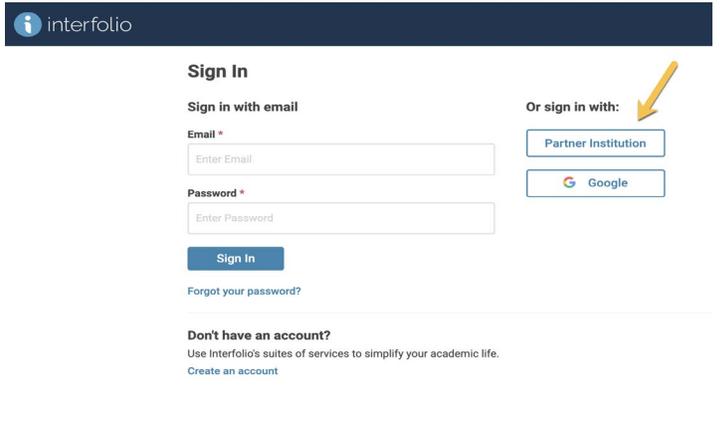
eFACULTY COMMITTEE MEMBER ROLE & TASKS

In eFaculty, Committee Members' tasks include, but are not limited to:

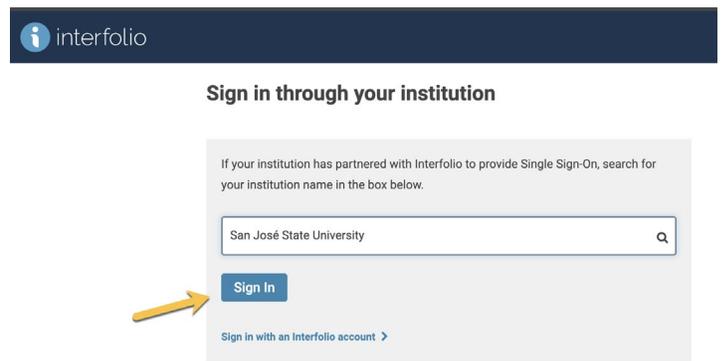
- Managing case lists

- Evaluating cases
- Submitting responses in forms
- Move the case forward (if one is the Committee Manager at the end of the review step)

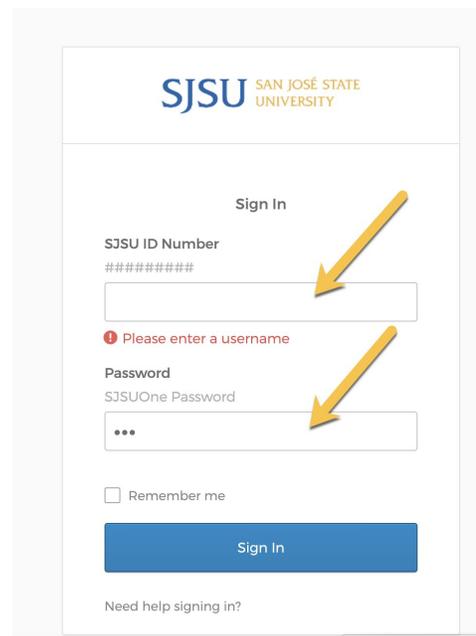
LOGGING IN

<p>1. Log in through https://one.sjsu.edu/ and search for "eFaculty"</p>	
<p>2. You will be directed to eFaculty's homepage, and you will see "My Tasks." There should be two sections (also known as modules): Faculty180 and Review, Promotion, and Tenure (RPT).</p>	
<p>3. Logging in through one.sjsu.edu is preferred, but you can also log in by visiting https://home.interfolio.com/ and selecting "Partner Institution." For security purposes, please do not select "Forgot your password?" or "Create an account." These options are not secured, and SSO Okta is not integrated. Only use your SJSU credentials to sign into eFaculty.</p>	

4. Enter "San José State University" and select "Sign In."



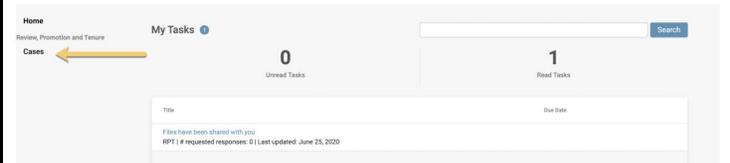
5. Enter your SJSU Credentials

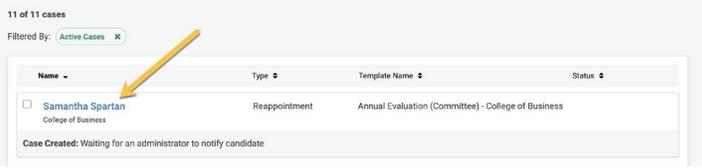
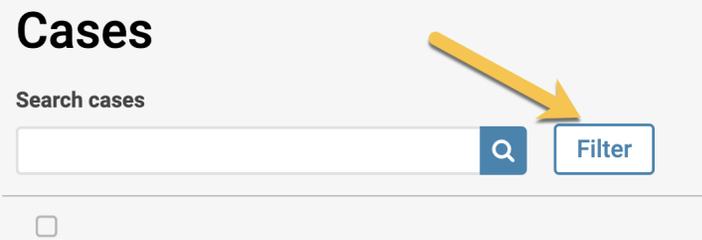
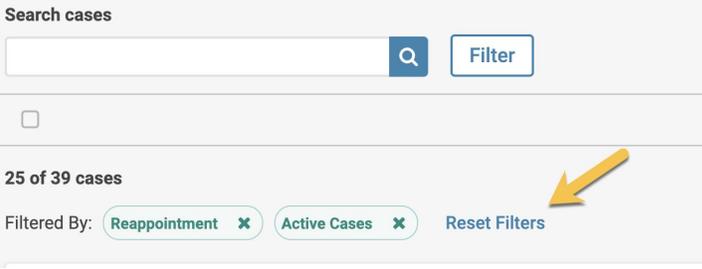


VIEW AND MANAGE CASE LIST

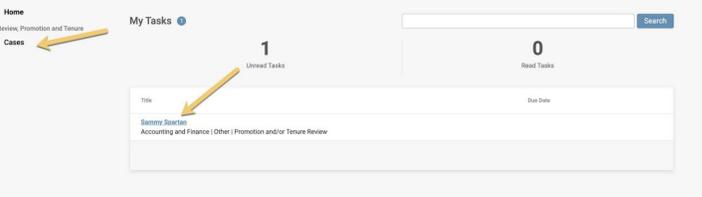
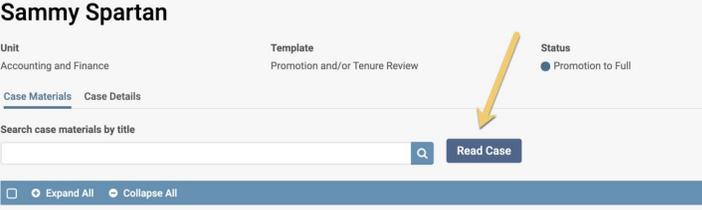
Note: You will see all cases on your Task list. When a case is moved, the case will no longer appear in your list.

1. Select "Cases" from the side navigation menu



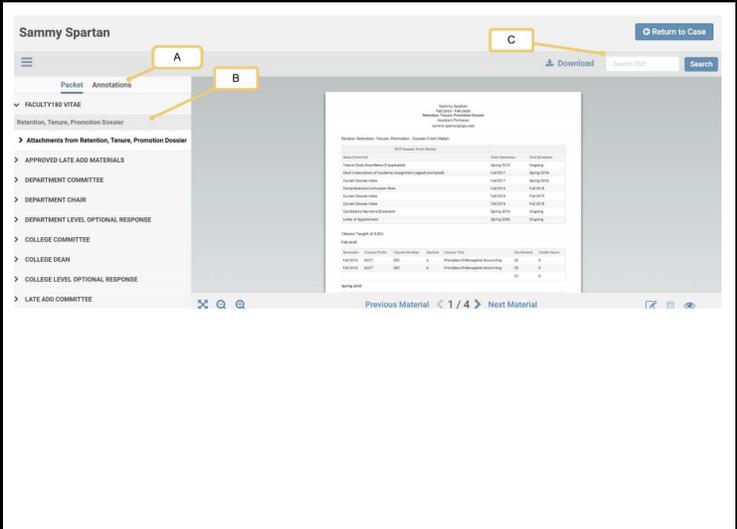
<p>2. To open a case, select the faculty member's name on the case. The name is a URL and will direct you to the case.</p>	
<p>3. To filter the case list, Select "Filter" to sort by unit, case type, status, and active or closed cases. Tip: Filtering by "Active Cases" speeds up searches.</p>	
<p>4. Select the "Reset Filters" to remove the selected filter</p>	

USING THE DOCUMENT READER

<p>1. Select "Cases" from the left hand navigation menu or select the name of the candidate to open the case.</p>	
<p>2. Select "Read Case"</p>	

3. The next window will be the "Document Reader." The Faculty180 Vitae contains all direct entry text from the candidate--it is the core document. Attachments are listed and are viewable under each standardized Activities tab label.

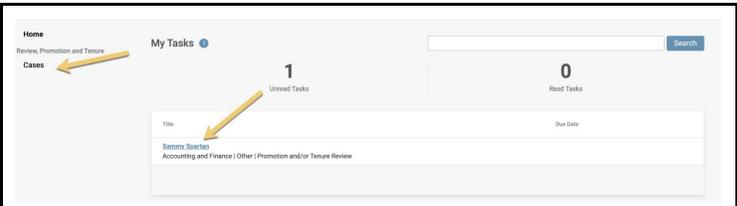
Annotations will appear in their own table in the reader (A). Packet sections are bookmarked to the left (B). If the text data is stored, you can select "Search" (C).



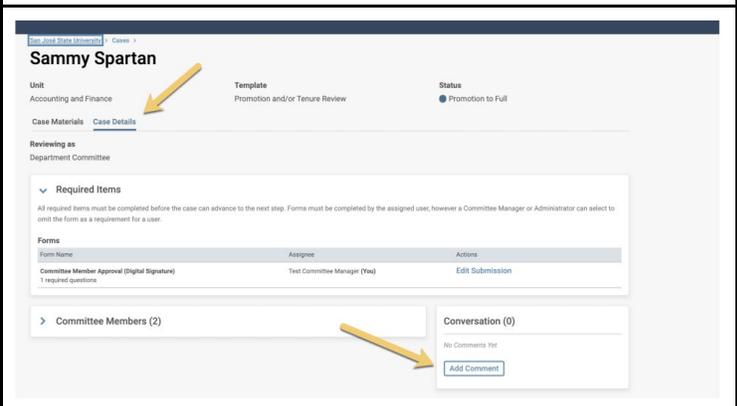
4. **Note:** You may not download the packet or attachments. This allows us to protect the confidentiality of materials submitted for the review process.

COMMENTS FOR OTHER COMMITTEE MEMBERS (CHAT)

1. Select the applicant's case either by selecting "Cases" or selecting on the name of the applicant.



2. Select "Case Details" and look for the "Conversation" panel on the bottom right of the page.



3. Enter a comment and select "Add"

Conversation (1)

Add Comment VIEW: ALL | MINE | OTHERS'

TM Test Committee Manager...
New Comment

Add a Comment

+ Add Close

4. Your comment will appear, along with the date and time. You also have the option to delete your comment.

Conversation (1)

Add Comment VIEW: ALL | MINE | OTHERS'

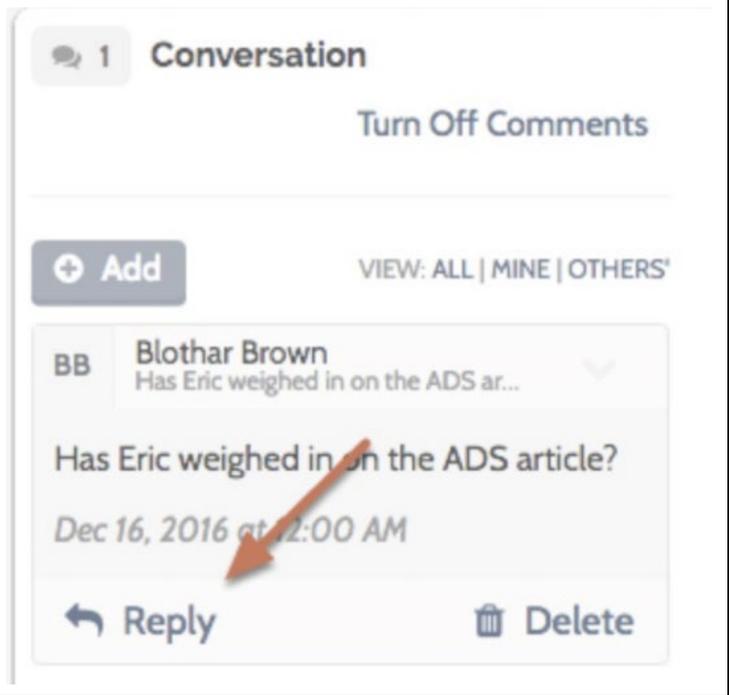
TM Test Committee Manager...
Add a Comment

Add a Comment

Aug 20, 2020 at 2:30 PM

🗑 Delete

5. You will be able to "Reply" to other comments as well.

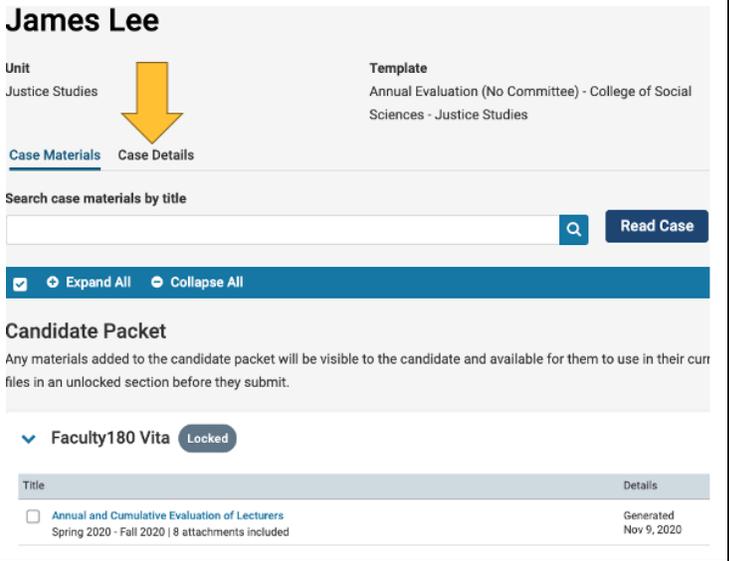


COMMITTEE MANAGER - HOW TO IMPLEMENT A RECUSAL

The committee manager is responsible for implementing recusals for cases where there are conflicts of interest or if committee members are choosing to abstain. When a member abstains, access to case materials should be cut off.

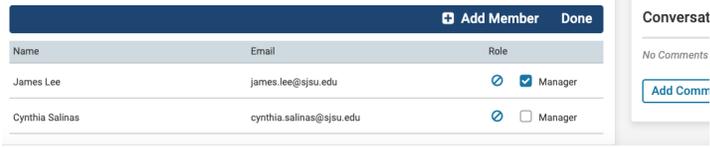
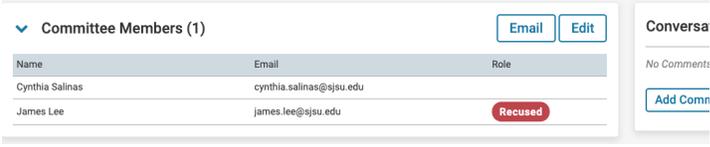
You should go to the committee page by entering a case and selecting "Case Details."

Scroll to the bottom of the page to the "Committee Members" section.

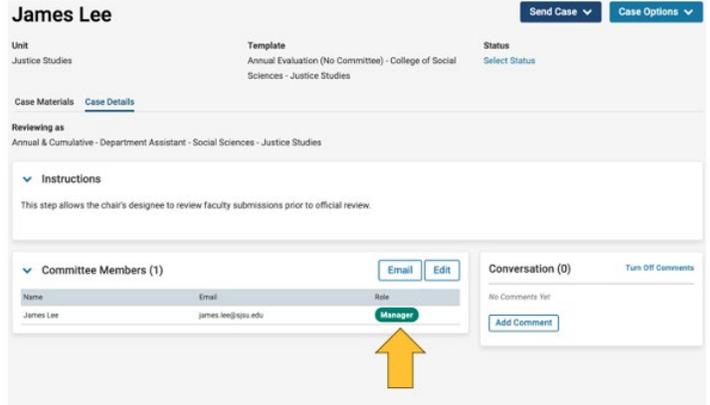
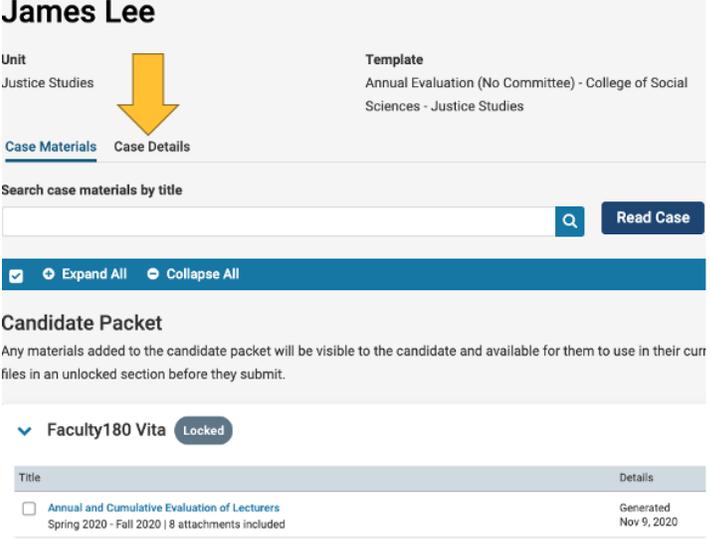


At "Committee Members" use the dropdown caret to see members. Choose Edit to select a member to recuse.



<p>The "Edit" feature shows manager information and a column labeled "Role." There are cancel symbols under "Role" in each member's row. Select the cancel symbol for the recusing member.</p>	
<p>There will be an indicator of the recusal, either a "+" with blue background or "Recused" with red background will appear.</p>	

COMMITTEE MANAGER - DESIGNATING A NEW MANAGER

<p>In eFaculty, the person designated the "Manager" is typically the person elected to chair of the committee or the nominal reviewer such as the chair or dean. In some instances, non-chair members or staff will fulfill the role of manager for the responsible party.</p> <p>If someone other than the chair or nominal reviewer is designated manager, please indicate this fact somewhere on the form being submitted.</p>	
<p>To assign the manager role to another person.</p> <ol style="list-style-type: none"> 1. Open the case and select "Case Details." 	

2. On the "Case Details" page, focus on the Committee Members Area.
3. Then, select "Edit"
4. If seeking to add a staff assistant, and they are not listed, an administrator would need to add them to the committee.

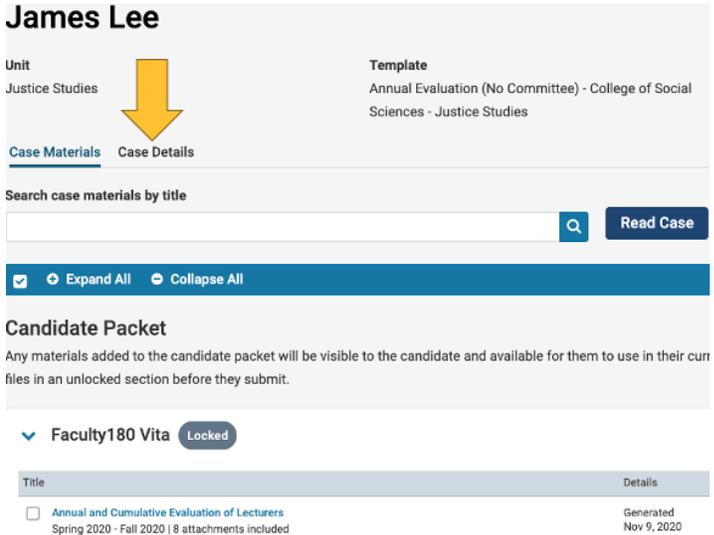
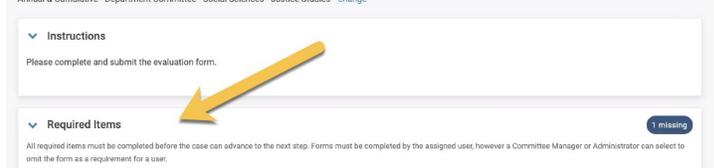
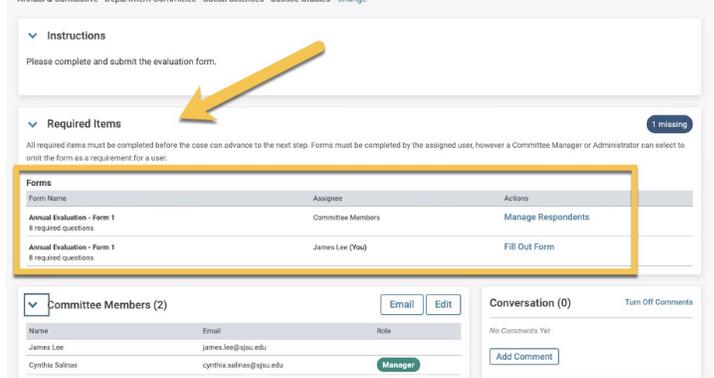
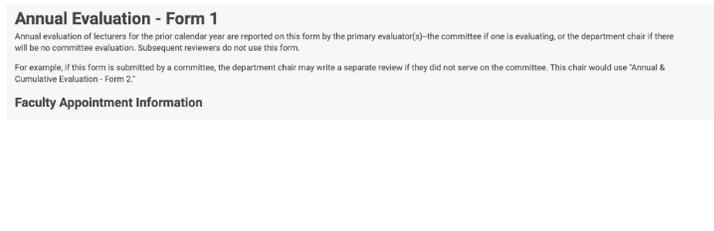
WARNING: Adding unelected faculty or granting access to anyone who is not classified confidential is prohibited. Always follow the unit 3 collective bargaining agreement and campus policies in restricting access to confidential faculty materials.

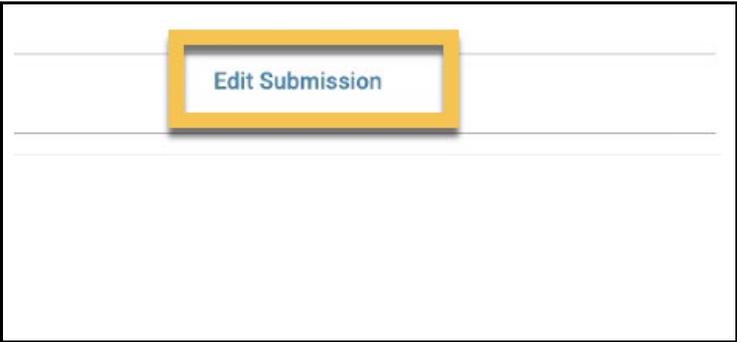
If ever in doubt about whether you may add a person to a "committee," please contact UP - FA for approval.

5. After selecting "Edit" in step 3 above, select the "Manager" box in the row of the appropriate person.
6. Then select "Done."
7. Upon return, the green manager label will appear next to the selected name.

NOTE: The system is set up for only one manager. Having more than one complicates the review process and leads to duplicate and possibly competing forms with differing statements. Under such circumstances, the review would be nullified.

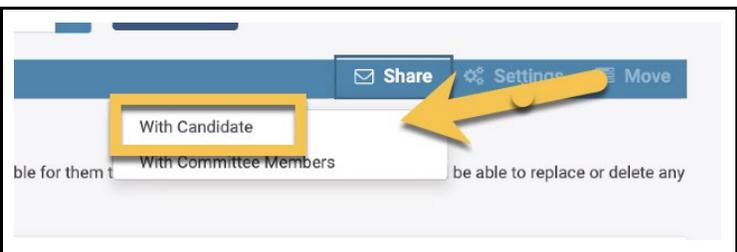
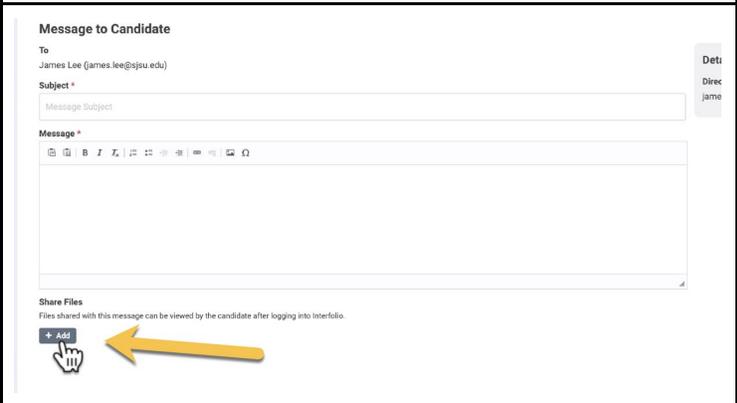
COMMITTEE MANAGER - SUBMITTING FORMS

<p>The proper review forms have been preloaded into eFaculty for the reviewers. The committee manager is responsible for uploading one form for the entire committee.</p> <p>To find the forms, open a case and go to "Case Details."</p>	
<p>The forms are under "Required Forms". In Annual and Cumulative Evaluation, only the manager should fill out the form.</p>	
<p>Only the "manager" should submit a form for annual and cumulative evaluations.</p> <p><i>If there are additional individuals listed under "Forms," or persons other than the "manager" are being asked to fill out the review form, please contact UP - FA.</i></p>	
<p>To fill out the form as manager, select "Fill Out Form," appearing in blue text in the far right of the form's row under "Required Items."</p>	
<p>You'll be directed to the required form. Please fill out the form with the appropriate information.</p> <p>Submit the form to allow other committee members to see it.</p>	

<p>Once the form is submitted, you can "Edit Submission," adding revisions using committee feedback.</p> <p>NOTE: Department committees are finished with their part upon submission of the final draft of the form--at the department level, department chairs manage the next step.</p>	
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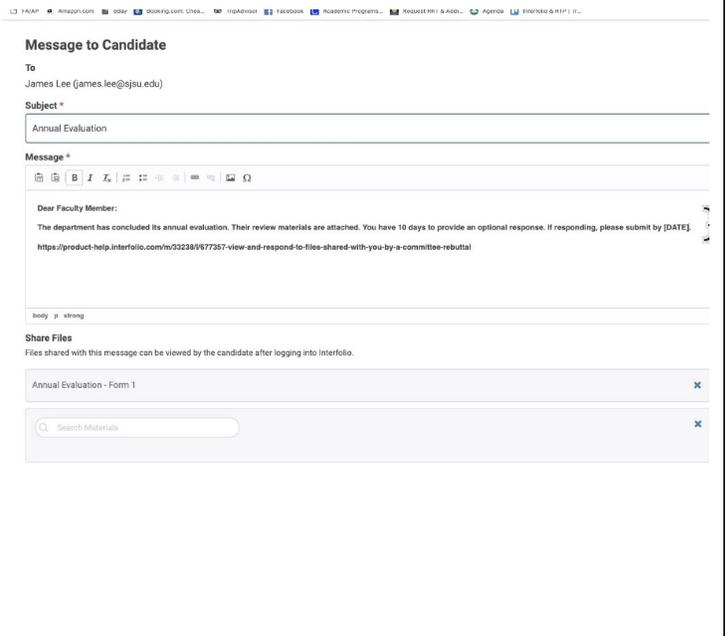
SENDING THE REVIEW TO THE CANDIDATE (OPTIONAL RESPONSE)

The Department Chair, and later the College Dean, will determine whether they or their administrative staff sends the review(s) to the candidate. *Department committees per se do not perform this function.*

<p>To send the review(s) to the candidate, go to Case Materials. Then select "Share," and choose, "With Candidate."</p>	
<p>An email interface will open. Choose "Add" at the bottom left of the screen.</p>	
<p>Select all reviews and memos produced at your level to share with the candidate.</p>	

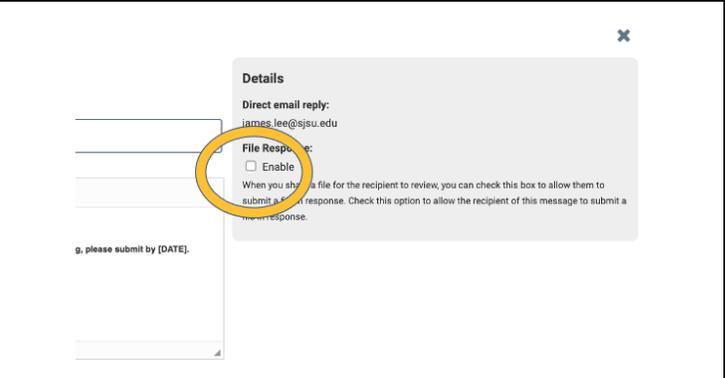
In the subject and message fields, copy and paste the standard “sharing review message for optional response” (Appendix in the eFaculty Annual & Cumulative Administrator Guide). Make sure that the due date in the message is always 10 calendar days after the review is sent and that it matches the date set in the next step.

See the [Annual & Cumulative Evaluation Calendar](#) for preset deadlines. Late review distribution should still allow a 10 day response period, regardless of posted deadlines. Candidates may waive the 10 day period or submit “final drafts” early.



To the right of the message field is a “Details” section.

Check the box under “File Response” next to the word, “Enable.”

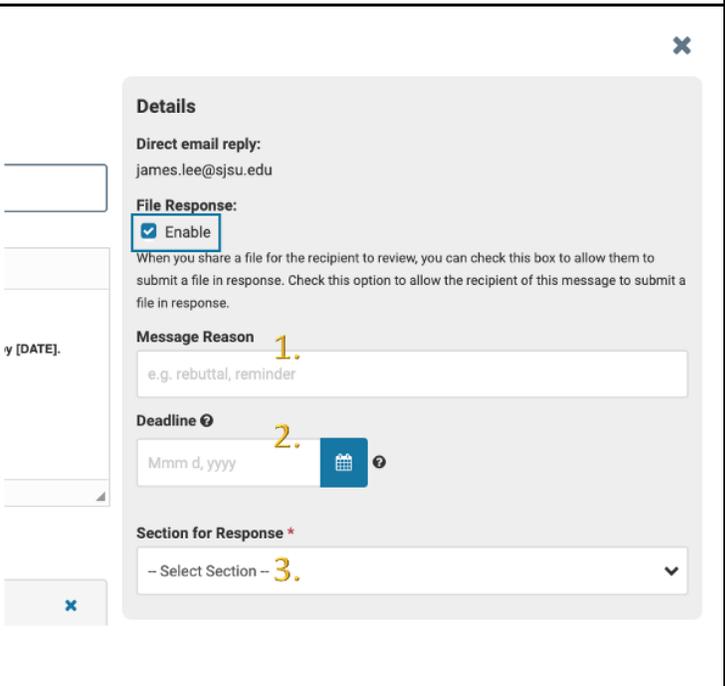


Checking “Enable” opens more fields that are needed.

1. Under “Message Reason,” type Annual (or Cumulative) Evaluation - Optional Response.
2. Use the calendar selector to choose the day at least 10 days out.

Check to be sure this date and the date stated in the email message are the same.

3. Under “Section for Response,” choose the level from which the review is being sent.
 - a. Department Committee if there will

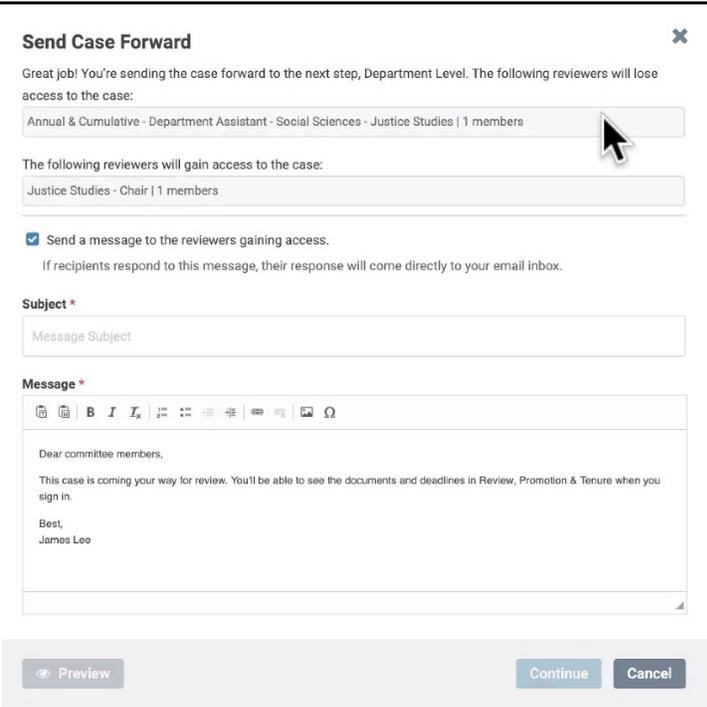
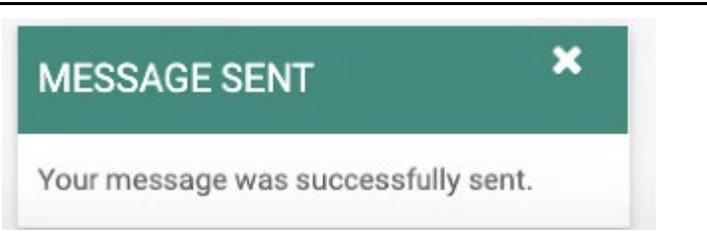


<p>be no chair review</p> <p>b. Department Chair if there is a chair review (regardless of whether there was a committee review)</p> <p>c. Dean or Appropriate Administrator for the college review</p>	
<p>When the optional response period ends, move the case forward to the next step.</p>	

MOVING THE CASE FORWARD

The Department Chair, and later the College Dean, will determine whether they or their administrative staff moves the case forward. *Department committees per se do not perform this function.*

<p>To get started, open the case. At the top right of the page is a "Send Case" dropdown box.</p> <p>Select "Forward to"</p>	
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<p>An email interface opens. Email messaging is used (required in eFaculty) to notify the next level of review.</p> <p>Committee chairs and reviewers must enter a subject for the email to send.</p> <p>A “factory set” message appears in the body. While it may be edited, it also may be sent without edits.</p> <p>One may “uncheck” the “Send a message...” statement to forward the case without a message.</p> <p>UP - FA will not need a message to take submissions. Please uncheck the box.</p> <p><i>If there is a unique issue to notify the next level of review about, it may be entered into the email message. Be mindful however, that all recipients will see the message.</i></p>	
<p>After entering the subject, click “Continue.” The case will move after the confirmation is made.</p> <p>You’re finished.</p>	

MORE HELP

- For additional tutorials, visit [Help for Interfolio, Review, Promotion & Tenure](#). **Note:** Interfolio tutorials may be slightly different compared to the eFaculty interface.
- For help, you can also contact UP-FA at efaculty@sjsu.edu.
- For Open Lab Hours, visit the [eFaculty Training Schedule](#).
- For FAQs related to eFaculty Training, [eFaculty Training FAQ](#).
- For general help, and solutions to problems, including QuickTips are at the [eFaculty Training and Help](#) web page.