

Part 2: Moving Cases to Department Review

*Scott Nguyen
Faculty Services
University Personnel*

Pg. 4: Required Documents
Pg. 5: Important Information
Pg. 6: Verification
Pg. 7: What the Case Should Look Like Before Moving
Pg. 8: READ CASE: What to Look For — Annual Evaluation
Pg. 9: READ CASE: What to Look For — Cumulative Evaluation
Pg. 10: How to Regenerate for Faculty
Pg. 11: Attention: Regeneration Restrictions
Pg. 12–14: Sending Cases Forward
Pg. 15: Sending Cases Forward — Inside the Case
Pg. 16: Template: Annual/Cumulative Evaluation — Sending to Reviewers
Pg. 17: Template: Cumulative Evaluation — Sending to Reviewers for College Review
Pg. 18: Case Sequence
Pg. 19: Sharing Documents and 10-Day Optional Response
Pg. 20-22: Sharing Documents and Optional Response



Pg. 23: Sending Annual Evaluation to the Candidate — 10-Day Optional Response

Pg. 24: Sending Cumulative Evaluation to the Candidate — 10-Day Optional Response

Pg. 25: Send to Step 3

Pg. 26: Send to Step 4

Pg. 27: Template: Moving Case to College Review

Pg. 28: Sharing College Review - Final Review - NO Optional Response

Pg. 29: Sharing Final Review - NO Optional Response

Pg. 30: Template - Annual Evaluation - College Level Decision

Pg. 31: Template - Cumulative Evaluation - College Level Decision

Pg. 32: Contact Information



Required Documents

This is a snapshot of the list of [Required Documents](#) that faculty are responsible for submitting as part of their Annual and/or Cumulative Evaluation.

Per Article 15.12(a) of the CSU–CFA Agreement, departments are responsible for providing any required materials that are not accessible to the employee. This often includes providing the official Direct Observation of Teaching to the faculty member so it can be uploaded.

Reach out to Faculty Services for assistance. Scott Nguyen, Temporary Faculty Evaluations Analyst, is primary contact:

 efaculty@sjsu.edu

 4-2204

Faculty should always be instructed to send requests to 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

Document Verification

- Faculty are responsible for uploading all documents; however, they may contact their department and/or efaculty@sjsu.edu for assistance if needed.
- Department Administrators and Chairs assist faculty in ensuring that all required documents have been submitted.

Faculty Case Submission

- Ensure that all packets are regenerated and submitted by the faculty. Once submitted, packets must be locked.
- If a faculty member is unable to regenerate or submit their packet, the department/efaculty may assist with this process to ensure submission by the due date.
- Packets that are **not regenerated** will **not include the most recent documents** from the “Activities” section.



What Do Faculty Need Before Cases Can Be Moved Forward?

Have all required documents been submitted?

- ASA-L
- SOTEs/SOLATEs
- Syllabi
- Direct Observations of Teaching

Has the faculty member regenerated their case?

- Faculty should regenerate their case to ensure all uploaded documents are included

Has the faculty member submitted the case?

- Faculty must click “Submit” to lock the case.

Can a case be regenerated after submission?

- Once cases are forwarded for review, they cannot be regenerated. Faculty may regenerate their case up until the submission due date.

What Do Department Administrators and Chairs Do to Assist?

Verify required documents have been submitted

- Review cases to confirm all required documents are included.
- If documents are missing, reach out to the faculty member.
- Common missing items include SOTEs/SOLATEs, syllabi, or Direct Observations of Teaching.
- Faculty should be advised to enter a note explaining why any required documents are missing.

If the faculty member did not regenerate their case

- Yes, you may regenerate the case on their behalf up until the submission due date.
- Regeneration is not permitted after the submission due date.
- Faculty should regenerate their case to ensure all documents are included; if they do not, please regenerate for them.

If the faculty member forgot to submit their case

- Yes, you may submit the case on the faculty member's behalf.



What should the case look like before moving

Ensure the following before sending cases forward

- Confirm the correct faculty member.
- Confirm the correct unit.
- Confirm the case has been regenerated.
- Ensure the Faculty180 Vita and all other documents are locked. If any documents are unlocked, please lock the packet.

The screenshot shows the 'Sammy Spartan' case page. At the top, the 'Unit' is 'Accounting & Finance' and the 'Template' is 'Annual Evaluation (Committee) - College of Business - Accounting and Finance'. The 'Status' is 'Select Status'. Below this is a search bar for 'Case Materials' and a 'Read Case' button. A blue bar contains 'Expand All', 'Collapse All', 'Share', 'Settings', and 'Move' options. The 'Candidate Packet' section explains that materials added are visible to the candidate. Below this, there are two sections: 'Faculty180 Vita' and 'Other Documents (Optional)'. Both sections have a green 'Unlocked' button and a yellow 'Lock' button. The 'Faculty180 Vita' section shows a table with columns 'Title', 'Details', and 'Actions'. The table contains one row: 'Annual/Cumulative Evaluations Spring 2024 - Fall 2025 | 4 attachments included' with details 'Generated Aug 5, 2025'. The 'Other Documents (Optional)' section has an 'Add File' button and a message 'No files have been submitted.'

Annotations from the list on the left point to the following elements in the screenshot:

- 'Confirm the correct faculty member.' points to the 'Sammy Spartan' header.
- 'Confirm the correct unit.' points to the 'Accounting & Finance' unit header.
- 'Confirm the case has been regenerated.' points to the 'Unlocked' button in the 'Faculty180 Vita' section.
- 'Ensure the Faculty180 Vita and all other documents are locked. If any documents are unlocked, please lock the packet.' points to the 'Unlocked' button in the 'Faculty180 Vita' section and the 'Unlocked' button in the 'Other Documents (Optional)' section.

Once all items above have been verified, send the case forward for review.



READ CASE: What to look for - Annual Evaluation

For Annual Evaluations: This is an example of all required materials have been submitted:

- **ASA-L** has been uploaded.
- **Direct Observations of Teaching** have been uploaded.
- **Syllabi** have been uploaded. **SOTEs** have been automatically uploaded.

It is important to verify that all required materials are submitted before sending the case to the next step.

The screenshot displays a web interface for a case review. At the top, the name 'Sammy Spartan' is shown. Below it are tabs for 'Packet' and 'Annotations', with 'Packet' selected. A dropdown menu is open, showing a list of items under the heading 'Annual/Cumulative Evaluations'. The items are: 'FACULTY180 VITAE', 'Attachments from Annual/Cumulative Evaluations', 'Review: Annual/Cumulative Evaluations', 'ASA-L - 2025 - Sammy Spartan.docx', 'Direct Observations of Teaching', 'Direct Observations of Teaching - Fall 2025 - Sammy Spartan.docx', 'Classes Taught at SJSU, SOTE/SOLATEs, Syllabi, etc.', 'Professional_Preparation_in_Art_Section_81_ART_1_Sp', and 'Spring_2025_ART_1_80.pdf'. Below this list are three expandable sections: 'DEPARTMENT CHAIR', 'DEAN OR APPROPRIATE ADMINISTRATOR', and 'FACULTY SERVICES'.

Sammy Spartan

Packet Annotations

▼ FACULTY180 VITAE

Annual/Cumulative Evaluations

▼ Attachments from Annual/Cumulative Evaluations

▼ Review: Annual/Cumulative Evaluations

ASA-L - 2025 - Sammy Spartan.docx

▼ Direct Observations of Teaching

Direct Observations of Teaching - Fall 2025 - Sammy Spartan.docx

▼ Classes Taught at SJSU, SOTE/SOLATEs, Syllabi, etc.

Professional_Preparation_in_Art_Section_81_ART_1_Sp

Spring_2025_ART_1_80.pdf

> DEPARTMENT CHAIR

> DEAN OR APPROPRIATE ADMINISTRATOR

> FACULTY SERVICES



READ CASE: What to look for - Cumulative Evaluation

For Cumulative Evaluation: This is an example of all required materials have been submitted:

- **All Prior Evaluations + ASA-L** has been uploaded.
- **Direct Observations of Teaching** have been uploaded.
- **Syllabi** have been uploaded.
SOTEs have been automatically uploaded.

It is important to verify that all required materials are submitted before sending the case to the next step

The screenshot displays the 'Sammy Spartan' case review interface. At the top, there are tabs for 'Packet' and 'Annotations'. Below this, a section titled 'FACULTY180 VITAE' contains a sub-section 'Annual/Cumulative Evaluations'. Underneath, there is a link 'Review: Annual/Cumulative Evaluations'. The 'Attachments from Annual/Cumulative Evaluations' section lists three files: 'Annual Evaluation - 000000001 - Sammy Spartan 2025.pdf', 'UPFA Temporary Faculty - Annual Evaluation - 000000001 - Sammy Spartan - 2024.pdf', and 'UPFA Temporary Faculty - Annual Evaluation - 000000001 - Sammy Spartan 2023.pdf'. The 'Direct Observations of Teaching' section lists two files: 'Direct Observations of Teaching - Fall 2025 - Sammy Spartan.docx' and 'Direct Observations of Teaching - Fall 2024 - Sammy Spartan.docx'. The 'Classes Taught at SJSU, SOTE/SOLATES, Syllabi, etc.' section lists two files: 'Professional_Preparation_in_Art_Section_81_ART_1_Sp' and 'Spring_2025_ART_1_80.pdf'. Blue arrows from the text on the left point to these sections: one to 'All Prior Evaluations + ASA-L' pointing to the 'Annual/Cumulative Evaluations' section, one to 'Direct Observations of Teaching' pointing to the 'Direct Observations of Teaching' section, and one to 'Syllabi' pointing to the 'Classes Taught at SJSU, SOTE/SOLATES, Syllabi, etc.' section.



How to Regenerate for faculty

How to Regenerate for Faculty

- Navigate to the faculty member's case
- Click "Edit" in the Faculty180 Vita section
- A pop-up window will appear showing the period of review
 - Confirm that the Start Term/Year and End Term/Year are correct
 - RPT will retrieve all documents that are date-stamped within the selected term range
- Click "Regenerate" then select "Yes" to confirm
- After confirming, refresh your browser

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

▼ Faculty180 Vita Locked View History Unlock

Title	Details	Actions
☐ Annual/Cumulative Evaluations	Generated Nov 13, 2024	Edit

Edit Vita

The vitae was last generated on Jan 20, 2025. Any information added or updates to existing activities after Jan 20, 2025 will not be reflected. Please select a new term range or regenerate the vita with the existing range to capture any new activities or information.

Vita Name
Annual/Cumulative Evaluations

Term Range *
Select the term range (time period) for the vita.

Start Term * **Start Year *** **End Term *** **End Year ***

Spring 2024 Fall 2024

Regenerate Cancel

Confirm

Regenerating the vita will create a PDF of the vita with any new information added to activities or any information removed from the activities within the specified term range. Annotations will be removed from any activities that no longer exist.

Yes No

Regenerate Cancel

- Once all cases have been regenerated, they must be locked and advanced to the next step.



Attention: Regeneration Restrictions

ATTENTION

Do NOT regenerate faculty packets once a case has been moved to review or after the submission due date.

Regeneration of Annual and Cumulative Evaluation cases is prohibited after submission or once a case enters review, unless explicitly authorized by Faculty Services.

Staff are instructed to manage cases in eFaculty only when asked to do so by Faculty Services (**and never manage cases in RTP, Mini Review, or Post Tenure Review**).

- CFA-CSU Collective Bargaining Agreement establishes uniform timelines for all evaluations.
- “Regenerating” after the packet is under review jeopardizes the integrity of the evaluation of the case.



- Navigate to one.sjsu.edu.
- Log in using your credentials.
- Select the eFaculty tile.



- From here, you can access the Annual and Cumulative cases you have created.
- Select “Cases” to view all available cases
- Or
- Click on a case from your landing page to view the faculty record

The screenshot shows the SJSU eFACULTY interface. The top navigation bar includes the SJSU logo, 'eFACULTY', and the user name 'Scott Nguyen'. The main content area is divided into several sections:

- Home:** A message about the Interfolio Office being closed for U.S. Holiday, stating that the Scholar Services help desk will be closed on Monday, January 20th, and will be back on Tuesday, January 21st.
- Announcements & Help:** A link to 'Interfolio's Scholar Services help desk'.
- Evaluations:** A link to 'Interfolio's Scholar Services help desk'.
- Administration:** A dropdown menu with options: 'Review, Promotion and Tenure', 'Cases', 'Templates', 'Administration', 'Reports', and 'Users & Groups'. The 'Cases' option is highlighted in yellow.
- My Tasks:** A section showing '54 Unread Tasks' and a search bar.
- Read Tasks:** A section showing '0 Read Tasks'.
- Cases Table:** A table listing cases with columns for 'Title' and 'Due Date'. The table contains five rows of data, all highlighted in yellow.

Title	Due Date
Craig England Chemical & Materials Engr Review Lecturer Range Elevation - College of Engineering	Mar 7, 2025
Igor Tyukhov Interdisciplinary Engineering Review Lecturer Range Elevation - College of Engineering	Mar 7, 2025
Susan Trimmingham Art and Art History Review Lecturer Range Elevation - College of Humanities and The Arts	Mar 7, 2025
David Williams Kinesiology Review Lecturer Range Elevation - College of Health and Human Sciences	Mar 7, 2025
John Todd	Mar 7, 2025

At the bottom of the page, there is a footer with the text '© 2025 Elsevier Inc.', 'Privacy Policy', and 'Cookie Notice'.



To Send a Case Forward

- Once you have located the faculty case you want to move forward, check the box to the left of the faculty member's name.
- After selecting the case, click "Send Forward."
- The "Send Case Forward" screen will appear.

SJSU | eFACULTY Scott Nguyen

Home Faculty180 Search cases

Announcements & Help Evaluations Administration

2 of 2 cases Filtered By: Active Cases

Review, Promotion and Tenure

Name	Type	Template Name	Status
☒ sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 1 of 4: Department Assistance Jan 31, 2025			
☒ sammy spartan Applied Data Science	Review	Mini Review of Probationary Faculty	
Step 1 of 5: Faculty Services Admin Step			

© 2025 Interfolio, Inc. Privacy Policy Cookie Notice

Note:

Only select (check) **Reappointment cases** that are ready to be moved forward.

In the example above, you would move forward **only the Reappointment/Annual case** at the "Department Assistance" step.

Please verify the **case type** before sending it forward. If the case type is incorrect, **deselect the case** before proceeding.



Sending Case Forward

Please enter the appropriate email subject:

- Annual Evaluation Case Is Available for Review
- Cumulative Evaluation Case Is Available for Review

Please enter the message using the templates provided in the slides, or feel free to use your own template to notify the faculty member.

The screenshot shows the 'Send Cases Forward' dialog box within the SJSU eFaculty interface. The dialog box has a title bar with a close button (X) and a user profile dropdown (Scott Nguyen). The main content area includes a confirmation message: 'Please confirm you wish to send the following cases forward to the next step in the review process.' Below this, there are two text input fields, both containing the text 'sammy spartan is moving forward to "Department Level"'. A checkbox labeled 'Send a message to the reviewers gaining access.' is checked, with a sub-note: 'If recipients respond to this message, their response will come directly to your email inbox.' The 'Subject' field is labeled with an asterisk and contains the text 'Annual Evaluation Case is available for Review'. The 'Message' field is also labeled with an asterisk and contains a rich text editor with the following text: 'Dear Committee Members, 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 reviewer's 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'. At the bottom of the dialog box, there are three buttons: 'Preview' (with an eye icon), 'Send' (with a right arrow icon), and 'Cancel'.

Send Cases Forward

Please confirm you wish to send the following cases forward to the next step in the review process.

sammy spartan is moving forward to "Department Level"

sammy spartan is moving forward to "Department Level"

☒ Send a message to the reviewers gaining access.

If recipients respond to this message, their response will come directly to your email inbox.

Subject *

Annual Evaluation Case is available for Review

Message *

Dear Committee Members,

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 reviewer's 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

Preview Send Cancel



Send Cases Forward - Inside the Case

Alternatively, you may send cases forward from within the case.

To Move a Case Forward

- Navigate to the top-right corner of the case.
- Select “Send Case.”
- Choose “Forward to Department Review.”
- This will open the “Send Case Forward” screen.

Please refer to the other slides for the email templates.

The screenshot displays the SJSU eFACULTY interface for a case titled "sammy spartan". The user is logged in as Scott Nguyen. The interface shows the case details, including the unit "Accounting & Finance" and the template "Annual Evaluation (Committee) - College of Business - Accounting and Finance". The "Send Case" button is highlighted in the top right corner. A dropdown menu is open, showing the option "Forward to Department Level". A "Send Case Forward" modal is open, showing the confirmation message and the "Send" button. The modal text includes: "Please confirm you wish to send the following cases forward to the next step in the review process.", "sammy spartan is moving forward to 'Department Level'", "sammy spartan is moving forward to 'Department Level'", "Send a message to the reviewers gaining access.", "If recipients respond to this message, their response will come directly to your email inbox.", "Subject: Annual Evaluation Case is available for Review", "Message: Dear Committee Members, 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 more guidance your review process visit our reviewers guide, our off-site 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", "Preview", "Send", "Cancel".



[Link to Template](#)

Sending the case to the Reviewers for Annual or Cumulative Evaluation

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.



[Link to Template](#)

Sending Cumulative Evaluation to the College Level

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).



Once the case has been successfully moved forward, you will see that it has updated to the new step.

All cases should be moved from Step 1 to Step 2 to provide department reviewers access to the case.

Name ▾	Type ⇅	Template Name ⇅	Status ⇅
☐ sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 1 of 4: Department Assistance Jan 31, 2025			



Name ▾	Type ⇅	Template Name ⇅	Status ⇅
☐ sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level Feb 26, 2025 ⚠ Required Documents			



Sharing Documents and Optional Response

Once the review and confidentiality agreement forms are signed and submitted, evaluations may be shared with faculty.

Departments will share the following with faculty:

- Department-level review

Departments must provide faculty with a 10 Day optional response window.

Refer to the [calendar](#) for the Optional Response Due Date.

NOTE:

If there is any delay in issuing department evaluations, contact Faculty Services immediately at eFaculty@sjsu.edu.

Once the 10-day optional response period has passed, packets may be moved forward to the College-level review.

Important:

The College review is final, and faculty will **not** have an opportunity to submit an additional 10-day optional response at that stage. Faculty should be informed that if they wish to submit a rebuttal, it must be done during the Department-level review.

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

> Department Assisted Document Upload

[Edit](#)[Add File](#)

▼ Department Committee

[Edit](#)[Add File](#)

Materials

Title	Details	Actions
☐ Annual Evaluation Review by Scott Nguyen	Added by Scott Nguyen Jan 27, 2025	Edit

> Department Chair

[Edit](#)[Add File](#)

> Dean or Appropriate Administrator

[Edit](#)[Add File](#)

> Faculty Services

[Edit](#)[Add File](#)

During this phase, cases will be moved:

From Step 2: Department-Level Review

Submission Date:

Please refer to the [calendar](#) for the due date. All reviews and confidentiality agreement forms must be signed and submitted before a case can be moved to the next step.

If these required documents are not present, you will not be allowed to move the case forward.

If required forms are missing, a “Required Documents” notification will appear indicating which items are outstanding. Cases with missing reviews cannot advance.

To Step 3: Dean or Appropriate Administrator Review

If all required forms have been submitted, you will be able to move the case forward to Step 3.

Name ▾	Type ▾	Template Name ▾	Status ▾
☐ sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level Feb 26, 2025 ⚠ Required Documents			

Name ▾	Type ▾	Template Name ▾	Status ▾
☐ sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 3 of 4: Dean or Appropriate Administrator Apr 8, 2025			



To Share Documents

- Click the checkbox next to the document you wish to share with the faculty member.
- Once the document is selected, click “Share” located in the blue bar.
- Select “With Candidate.”
- You will then be taken to the next page.

The screenshot shows a web interface for sharing documents. At the top, there is a blue bar with 'Expand All' and 'Collapse All' links, and a green 'Share' button with an envelope icon. Below this is a section titled 'Internal Sections' with a warning: 'These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.' There are two yellow dropdown menus: 'With Candidate' and 'With Committee Members'. Below these are two sections: 'Department Assisted Document Upload' and 'Department Committee', each with 'Edit' and 'Add File' buttons. The 'Department Committee' section contains a 'Materials' table with one row: 'Annual Evaluation Review by Scott Nguyen', which has a checked checkbox, details 'Added by Scott Nguyen Jan 27, 2025', and an 'Edit' link. Blue arrows point from the list items to the interface: from the first item to the checkbox, from the second item to the 'Share' button, and from the third item to the 'With Candidate' dropdown.

Title	Details	Actions
☒ Annual Evaluation Review by Scott Nguyen	Added by Scott Nguyen Jan 27, 2025	Edit



- To

Add Another: User | Committee

Sammy Sparta

Add User

Subject *

10-Day Optional Response

Message *

11pt B I x² [Text Alignment] [List] [Link] [Image] [Table] [Code] [Undo] [Redo] [Clock]

Dear Faculty Member:

The department has concluded its review of your Annual Evaluation. Their recommendation form and memo are attached. You have 10 days to provide an optional response. If responding, please submit by ([Please review Calendar for 10-optional Responses Due Date ADD DATE/Use Template Provided](#)). If you do not respond, the case will still be moved forward. You may expedite the review by notifying your Dept. admin and Faculty Services (efaculty@sjsu.edu) that you will not be submitting a response.

Pursuant to Provision 15.5 of the CSU-CFA Collective Bargaining Agreement, Optional Responses shall be limited to a statement. Responses may not add new review materials. 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. Typically, issues such the following are addressed:

P = SPAIN

Details

Direct email reply:
scott.nguyen01@sjsu.edu

File Response:
☒ Enable
When you share a file for the recipients to review, you can check this box to allow them to submit a file in response.
Check this option to allow the recipients of this message to submit a file in response.

Message Reason
10-Day Optional Response

Deadline ⓘ
Select Due Date [Calendar Icon] ⓘ

Section for Response *
Dean or Appropriate Administrator

Share Files

Files shared with this message can be viewed by the recipient(s) after logging into Interfolio.

+ Add

Preview

Send Cancel

- Dean or Appropriate Administrator
- [Annual Template](#)
- [Cumulative Template](#)



Sending Annual Evaluation to the Candidate for 10 Day Optional Response

Note: The College Review is final, and faculty will not have the opportunity to submit an optional 10-day response at that stage. Please inform faculty that

[Link to Template](#)

Dear Faculty Member:

The department has concluded its review of your **Annual** Evaluation. Their recommendation form and memo are attached. **You have 10 days to provide an optional response. If responding, please submit by (Please review Calendar for 10-optional response Due Date).** If you do not respond, the case will still be moved forward. You may expedite the review by notifying your Dept. admin and Faculty Services (efaculty@sjsu.edu) that you will not be submitting a response.

Pursuant to Provision 15.5 of the CSU-CFA Collective Bargaining Agreement, Optional Responses shall be limited to a statement. **Responses may not add new review materials.** 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. Typically, issues such the following are addressed:

Explanation of your disagreement with evaluations

Correcting errors

Pointing out evidence in the dossier that was overlooked by reviewers

While your statement will center on evaluations from the college level of review, your intended audience shall be those at the next level of review who will receive the dossier next.

Please note that the link above will not work for sign on unless you are already signed in to your eFaculty account--visit one.sjsu.edu. Please see this help guide for submitting a response: <https://product-help.interfolio.com/candidate/view-and-respond-to-files-shared-with-you-by-a-committee-rebuttal>.



Sending Cumulative Evaluation to the Candidate for 10 Day Optional Response

Note: The College Review is final, and faculty will not have the opportunity to submit an optional 10-day response at that stage. Please inform faculty that if they wish to submit a rebuttal, it must be done during the Department-level review.

[Link to Template](#)

Dear Faculty Member:

The department has concluded its review of your **Cumulative** Evaluation. Their recommendation form and memo are attached. **You have 10 days to provide an optional response. If responding, please submit by (Please review Calendar for 10-optional response Due Date).** If you do not respond, the case will still be moved forward. You may expedite the review by notifying your Dept. admin and Faculty Services (efaculty@sjsu.edu) that you will not be submitting a response.

Pursuant to Provision 15.5 of the CSU-CFA Collective Bargaining Agreement, Optional Responses shall be limited to a statement. **Responses may not add new review materials.** 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. Typically, issues such the following are addressed:

Explanation of your disagreement with evaluations

Correcting errors

Pointing out evidence in the dossier that was overlooked by reviewers

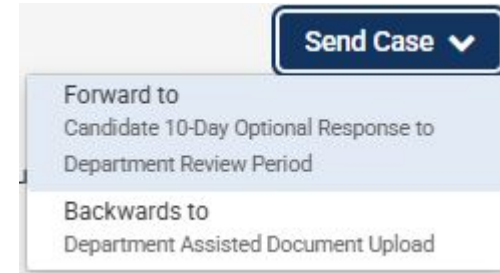
While your statement will center on evaluations from the college level of review, your intended audience shall be those at the next level of review who will receive the dossier next.

Please note that the link above will not work for sign on unless you are already signed in to your eFaculty account--visit one.sjsu.edu. Please see this help guide for submitting a response:

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



Once the 10-day Optional Response has been shared, move the case forward to step 3.



☐	Name ↓	Unit	Case type	Case step
☐	Sammy Spartan sammy.spartan@sjsu.edu	Accounting & Finance	Reappointment	Step 3 of 5: Candidate 10-Day Optional Response to Department Review Period



Once the deadline to submit has passed, the department will send the case to Step 4. College Review.

Send Case ▼

Forward to

College Review Submission – Dean/Appropriate Administrator

Backwards to

Department Review Submission – Committee Required

☐	Name ↓	Unit	Case type	Case step
☐	Sammy Spartan sammy.spartan@sjsu.edu	Accounting & Finance	Reappointment	Step 4 of 5: College Review Submission – Dean/Appropriate Administrator Missing committee materials



[Link to Template](#)

Dear Dean/Appropriate Administrator:

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.



Sharing College Review - Final Review - No Optional Response

Once the College Level reviews have been submitted, the Dean, appropriate administrator, or assigned delegate is responsible for sharing the final decision from the Dean's-level review. Please ensure that this review is communicated to the faculty member, as the version shared with them constitutes the final review.

You may copy and paste the provided template from the next slide, or use your own template in the Subject and Message fields.

Reminder: The College-Level Review is the final review being shared.

A 10-day optional response period is not required at this stage. However, if the faculty member wishes, they may upload a response to their PAF.



To Share Documents

- Click the checkbox next to the document you wish to share.
- Click “Share” located in the blue bar.
- Select “With Candidate.”
- You will then be taken to the next page.

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

> Department Assisted Document Upload
 Edit Add File

> Department Committee
 Edit Add File

> Department Chair
 Edit Add File

▾ Dean or Appropriate Administrator
 Edit Add File

Materials

No files have been added to this section.

Committee Forms

Title	Details	Actions
☒ Annual Evaluation Form - Appropriate Administrator Step 3: Annual & Cumulative - MPP - College of Education	Last Response Submitted Apr 3, 2025	Edit

> Faculty Services
 Edit Add File

Case Materials Case Details

Search case materials by title

Q Read Case

☐ Expand All Collapse All

✉ Share ⚙ Settings 📁 Move



[Link To Template](#)

Dear Faculty Member,

The College has concluded its review of your **annual** evaluation. The decision is attached, and it will be placed in your Personnel Action File (PAF). Decisions do not entail a 10-day optional response period.

However, pursuant to Provision 11.2 of the CSU-CFA Collective Bargaining Agreement, faculty shall have the right to submit material to their PAF. This may occur at any time by sending the material to Faculty Services.



[Link to Template](#)

Dear Faculty Member,

The College has concluded its review of your **Cumulative** evaluation. The decision is attached, and it will be placed in your Personnel Action File (PAF). Decisions do not entail a 10-day optional response period.

However, pursuant to Provision 11.2 of the CSU-CFA Collective Bargaining Agreement, faculty shall have the right to submit material to their PAF. This may occur at any time by sending the material to Faculty Services.



Questions or need 1 on 1 assistance, please contact:

eFaculty@sisu.edu

[Open Lab Schedule:](#)

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

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

