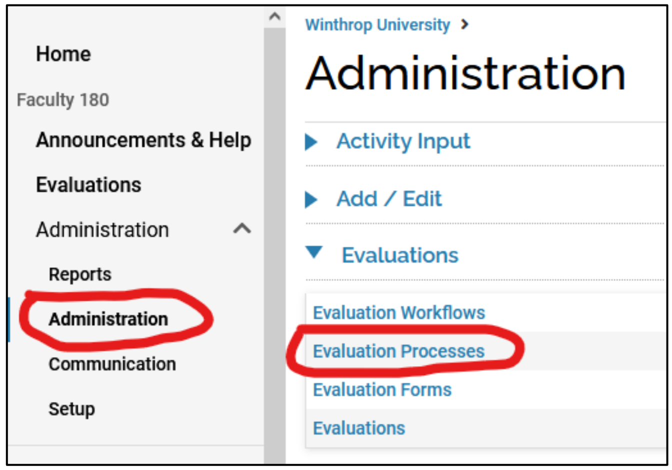
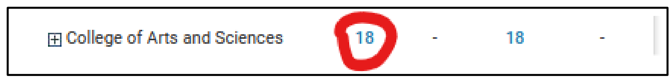
How to set up a chair/dean evaluation of faculty annual reports in Faculty 180

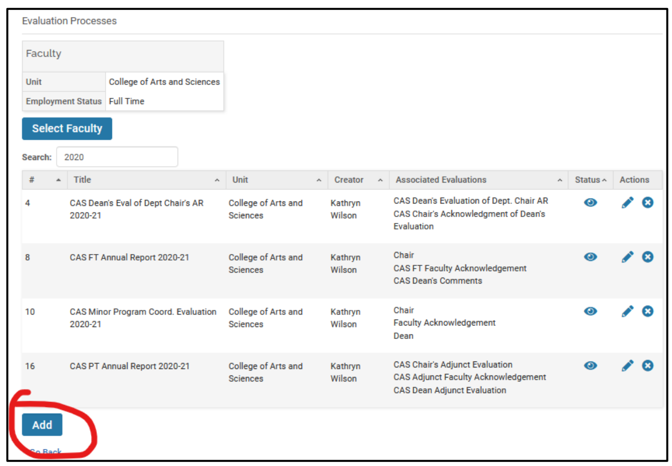
1. Go to the Administration sub-item in the main menu, and then click on **Evaluation Processes**.



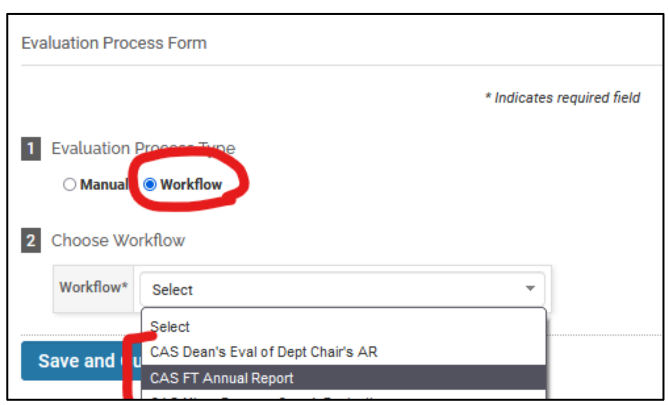
2. On the next screen, click on the number next to your college to go through to the actual list of processes.



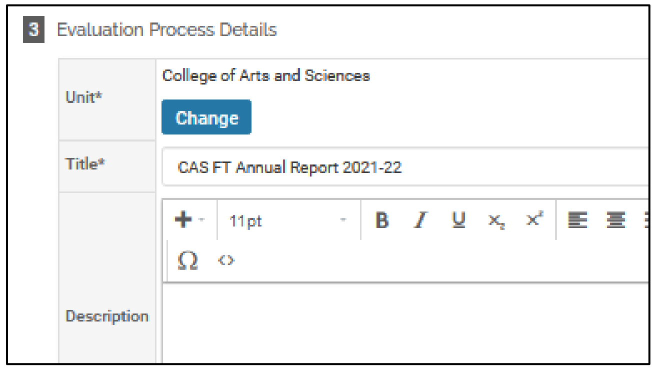
3. Then on that following page, click the **Add** button at the bottom of the page.



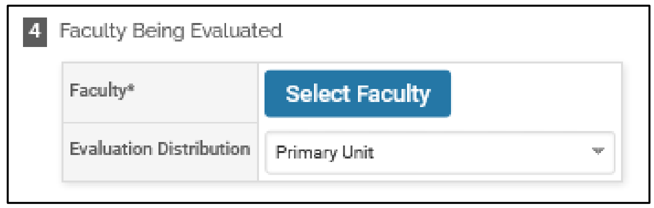
4. On the next screen, select **Workflow** for the type (so you can use an existing template), and then select the template you need from the dropdown list. *Note that workflows can't be deleted once they've been used, so all the old versions will still show up on the list. The name of the old workflow should have some sort of information like "prior to 2019" in the title to distinguish it, though.*



5. Once you've selected the template, other fields will appear on this same page for you to customize. In Section 3, you should edit the **Title** of the evaluation process with the current year. You don't need to add a description.



6. In Section 4, you will tell Interfolio which faculty will be evaluated using this process. Click on the Faculty button, and a popup window will appear.

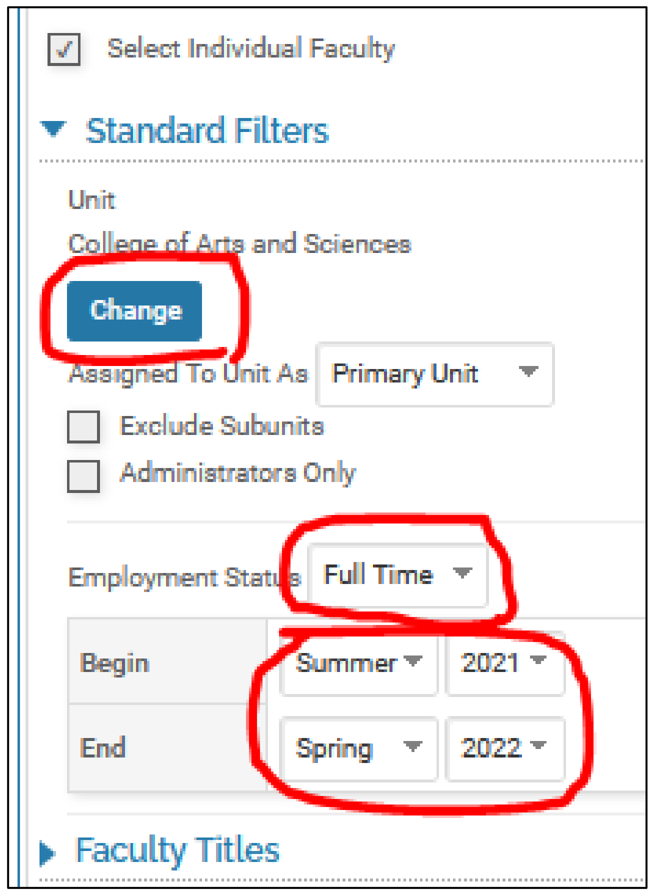


7. On the left side of the popup window are the various filter options. Make sure the correct college is showing under **Unit**, and if not use the **Change** button to select it.

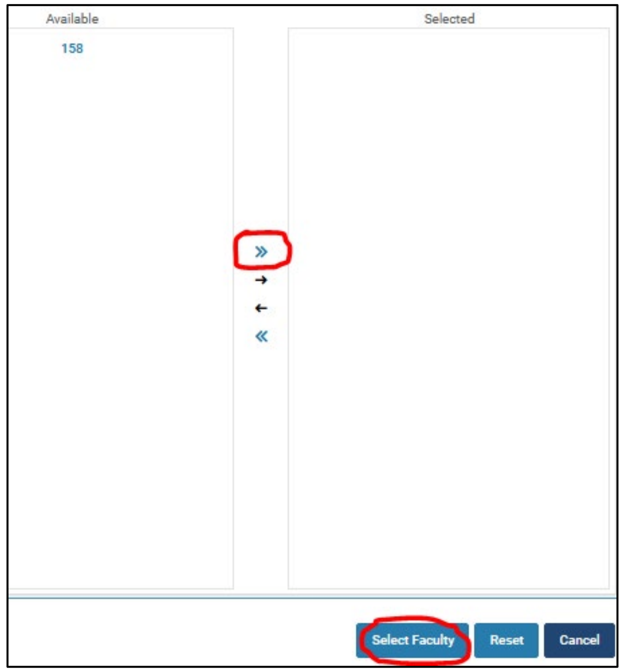
   Depending on whether you're setting up a full-time faculty evaluation or an adjunct evaluation, choose either Full Time or Part Time in the **Employment Status** dropdown.

   Set the dates to match the current academic year, so that only faculty who are marked as active in F180 will be included.

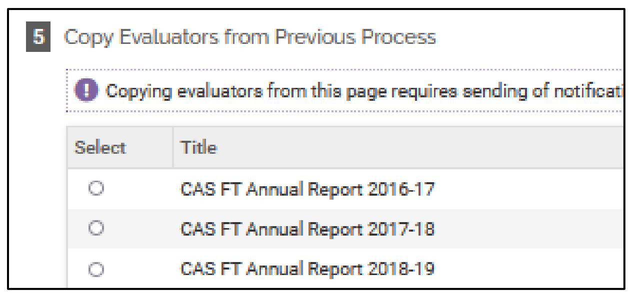
   There are additional filter fields available below these, like Faculty Title, but unless you're setting up an evaluation that is only for Full Professors, for example, you won't need these.



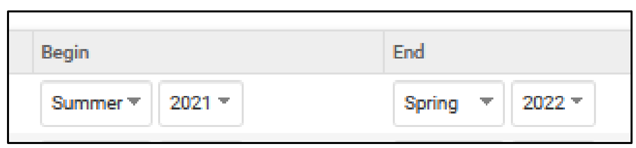
8. Once your filters are set the way you need them to be, you can add the selected faculty to the evaluation process on the right side of the screen. Click on the **double arrow** button to move all of the selected faculty from the **Available** column to the **Selected** column, and then click the **Select Faculty** button. *If you want to review the list of names before adding them you can click on the number in the Available column and the number will be replaced by all of the names, but I recommend checking each department's list later in the process instead.*



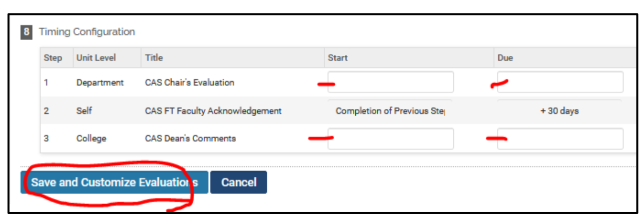
9. In Section 5 back on the main setup page, you can optionally copy the evaluator assignments from a previous year. This will assign the same chair/dean, so if most of your people are the same as the previous year this saves a bit of time. (You'll still double check them all later in the process, though.)



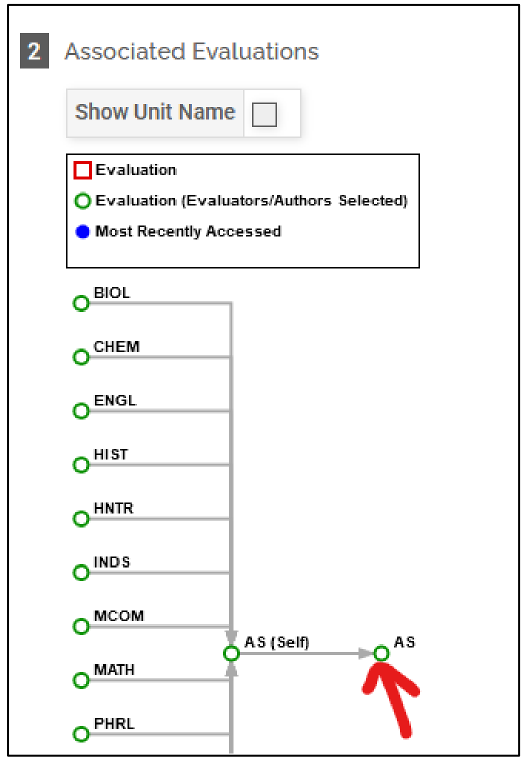
10. In Section 6, you need to set the dates for the current academic year so that when the evaluation form shows the chair/dean the faculty member's annual report, it shows them the data from this year.



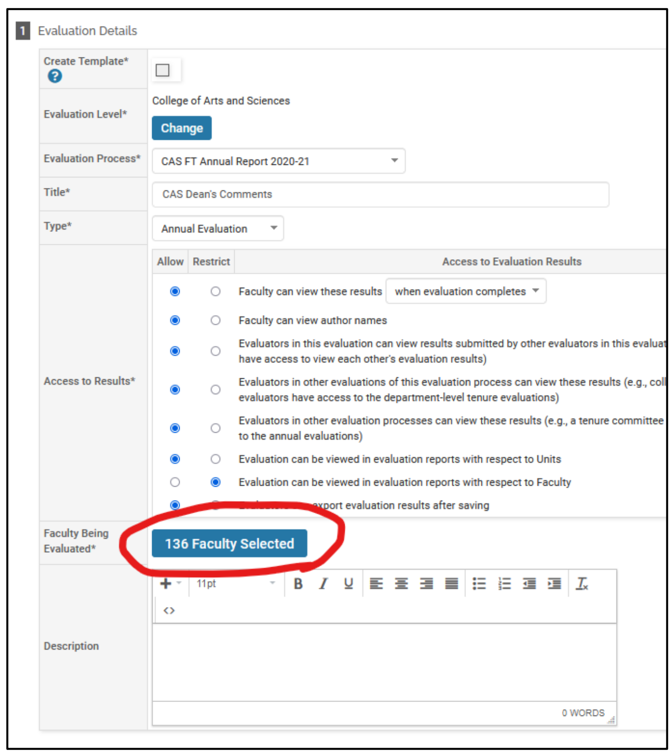
11. Section 7 can be left as-is; this just shows you the forms that are built into the template. In Section 8, you need to enter the start and end dates for each step of the process. The Start date will be when the evaluation will appear on the reviewer's dashboard as a to-do item, and the Due date will be when it disappears. Finally, click on Save and Customize Evaluation to go to the next stage.



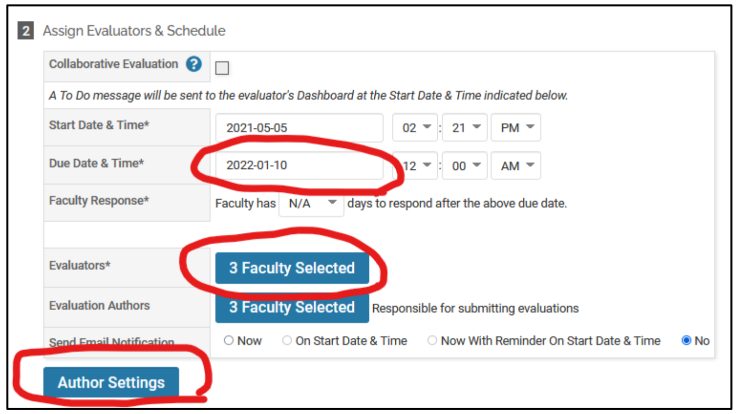
12. The next page will show you the structure of the evaluation. The first column shows the department chair evaluations, and in the example shown here the second step is a faculty acknowledgement of the chair's evaluation. (*Your college may have a different structure, but the same process management steps apply*.) Clicking on the green circle next to each step will take you to a page where you can view and edit the details for just that specific step.



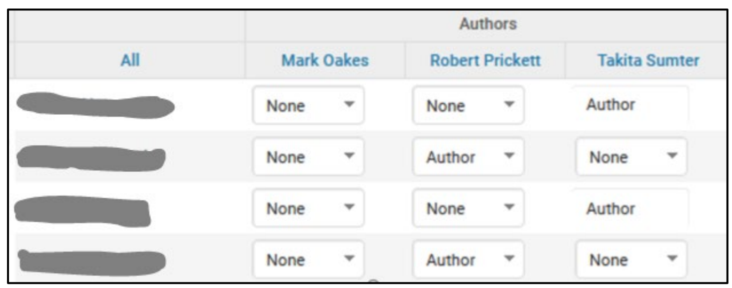
13. On the details page for each step, most of the fields will already be filled in the way they need to be. You should click on the button next to **Faculty Being Evaluated** to check that the specific list for that department (or for the college overall, if you're looking at the dean's comments step) is accurate. This popup window will be the same as the one in Steps 7-8 above. You will most likely need to remove the department chair from the list of each department's reviewees. *Additionally, if you need to add or delete a faculty member from the evaluation process after it has been set up initially, you can come back to these detail pages to do that. (See the note at the end of this tutorial about editing existing processes.)*



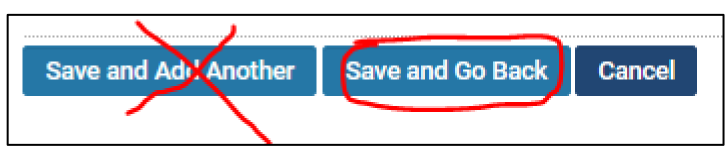
14. In Section 2 on this details page, you will see the evaluation dates you set up earlier, and you can edit them if a specific department has a different due date, or if you need to come back later and extend someone's deadline. The button next to **Evaluators** will show you who is currently assigned to do the evaluation at this step, and when you are initially setting up the evaluation you should always click through to check this. If you told the system to copy the evaluators from a previous use of this template, those will be the people who are currently selected, so if a chair is new this year you'll need to change that information here.



15. [OPTIONAL STEP USED IN SOME COLLEGES] The settings for **Evaluation Authors** and **Author Settings** are only needed if you have multiple evaluators at a certain step, but they will each only evaluate a subset of the faculty. If you need to use this feature, click on Author Settings, and then on the resulting popup screen each faculty member is listed to the left, and each evaluator across the top. There is a dropdown menu for each faculty/evaluator pair, where you can choose "Author" (that evaluator should do the evaluation), "Evaluator" (that evaluator will see the faculty member's AR in their queue but can't submit an evaluation; we rarely use this because it's confusing), or "None" (that faculty member won't appear in the evaluator's queue). There's also a section at the bottom of this popup screen to assign individual due dates to specific evaluator/faculty pairs, but it breaks the whole evaluation if you use this feature so just leave it all blank. Click **Save** to go back to the evaluation step details page.



16. Once you have finished checking/editing each step of the evaluation, click the **Save** button at the bottom of the screen. (Don't use the Save and Add Another button because that will bring up a screen you don't need.) Back on the evaluation process details page with the green circles, click on another circle to view/edit the next step, or click **Save and Go Back** when you are finished. (Again, don't click the Save and Add Another button.)



Editing a previously created evaluation process

To edit or update an evaluation process you previously created, you will navigate back to the list of processes (Steps 1 and 2 above) and then click on the pencil icon next to the evaluation you need to edit. This will skip the screen you saw in Steps 4-11, and you'll go straight to the process outline screen from Step 12, and you can follow the same steps to edit details from there.

Adding faculty members who didn't appear on the list of available people to add to the evaluation

If you have faculty members who don't appear on the list for their department's step, or in the list for the dean's level evaluation, then they are either new and need to be added, returning after a break and need to be reactivated, or they may have previously been assigned to a different primary department and their information needs to be updated. Contact the Interfolio application administrator on campus to make those changes, and then remember to go back into the evaluation item to add that person once their information has been added or updated.