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This guide is for probationary faculty using the eFaculty system for “Mini Review.” It explains the setup and management of cases using eFaculty, and it provides instructions for adding career information and evidence of success for mini reviews. While the local name for the faculty evaluation system is “eFaculty,” its vendor is [Interfolio](#). For more information on using eFaculty, please visit the [eFaculty](#) webpage on the SJSU University Personnel website. Interfolio also hosts a [help site](#) for users.

WHAT IS eFACULTY?

eFaculty enables faculty to organize a digital portfolio that can be passed through a structured review process. Faculty are able to more efficiently gather and upload essential materials into an organized electronic portfolio. eFaculty helps reviewers collaborate on faculty materials online in an environment that protects candidate confidentiality and enforces University Policies. eFaculty’s functions include:

- **Accepting and storing file uploads and case materials from candidates**, and displaying them in an organized manner
- **Establishing review processes with levels and reviewer assignments**, recommendations are recorded and distributed as needed along the way
- **Storing digital copies of reviews** for the faculty and other individuals to retrieve later.
- **Facilitating communication** between faculty, reviewers, and administrators.

KEY TERMS TO KNOW

- **Interfolio:** Vendor for eFaculty. Interfolio is a secure online solution to help higher education with faculty evaluation workflow and selection processes. 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 for the product in eFaculty that permits faculty to organize and store review materials (under the section named “Activities”). The review product, RPT, pulls information--by date range and review type--out of FAR and delivers it to reviewers for their assessment. The “Activities” area is available 24/7 for faculty to add (direct entry and uploading) evidence of their effectiveness and achievements.
- **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 Mini Review materials will be conducted within the RPT module).

- **Mini Review:** The primary purpose of the periodic evaluation or "mini review" is to provide probationary faculty with an annual assessment of the progress they have made toward earning tenure and promotion. These reviews are formative, providing the probationary faculty with review of the 3 categories of achievement in University Policy S15-8, so as to encourage professional growth that will merit the award of tenure, and advancement in rank if applicable, by the end of the probationary period.
- **Candidate:** eFaculty refers to the individual being reviewed as a Candidate.
- **eFaculty Administrator:** 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 users and standing committees. **Note:** *eFaculty Administrators will have access to settings, cases, and committees. eFaculty Administrators are entrusted to maintain confidentiality and report any misuse of the platform. Requests for assistance with eFaculty settings for Mini Review shall only and always be directed to or routed through chairs/directors, associate deans or deans, or UP - FA. Conflicts of interest with administrators should always be reported to facilitate setting modifications.*
- **Packet:** The collection of materials to be reviewed in eFaculty. Typically, material is drawn from Faculty180, but a few reviews (e.g., sabbatical) start with submitting packet materials directly to RPT.
- **Dossier:** Pronounced "'däsē.ā." This term is most often associated with Retention, Tenure, and Promotion performance reviews. In those reviews it is the comprehensive, robust body of material curated by the faculty member and their department or school's chair or director and placed under review, plus the materials generated during review. Here, the "Activities" section of Faculty180 is often called the dossier. The "Activities" section is divided by "tabs" that prompt placement of material by type and provide an organising scheme. Faculty will "date stamp," store, and manage career information and evidence of achievement within that framework. For evaluations and performance reviews, materials for the period of review are generated into a "packet" that is delivered to RPT, and reviewers add evaluations and recommendations to it. Using the traditional definition of the "dossier," the packet under review in RPT, and its review documents, are a dossier.

eFaculty's dossier features are now open to all faculty for all reviews (i.e., Mini Review, Post Tenure Review, Annual and Cumulative Evaluations of lecturers). The dossier feature enhances the quality of review by providing a platform to archive and build a dossier over time (e.g., for RTP, Range Elevation, Cumulative Evaluation) and

by making it easier for faculty to define their careers and display a broader range of evidence of their achievements regardless of review type.

- **Working Personnel Action File (WPAF):** The term used by the CFA-CSU Collective Bargaining Agreement to identify material under review, plus any materials generated during review. These items, some by reference (Index), are delivered to UP - FA and are added to the faculty member's Personnel Action File. WPAF, dossier, and packet are closely related terms.
- **Committees:** Groups of users (or individuals) that can review cases at a given step of the review process. There are two types of committees:
 - a. *Standing Committees*, which are set up outside of the cases so they can populate to multiple cases, and
 - b. *Ad Hoc Committees*, which can be set at multiple steps within a single case.**Note:** *Committees for Mini Reviews 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 serve as managers of the committees.
- **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., Mini Review) 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 probationary faculty for review. The eFaculty Administrator can lock or unlock a section for editing as needed. There are three types of sections within Interfolio:
 - a. Faculty Documents - any documentation that the probationary faculty adds for review
 - b. Committee Documents - any documentation that a eFaculty administrator adds for only committee members to view
 - c. Forms - created within Interfolio to collect specific information from the probationary faculty or committee members

- **Case Steps:** After the probationary 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 PROBATIONARY FACULTY ROLE & TASKS

All Faculty have 24/7 access to Faculty180 in eFaculty and are responsible for uploading materials required for any evaluation. Fortunately, SOTEs and SOLATEs are already loaded in eFaculty from CourseEval. You can also upload any missing SOTEs and SOLATEs to your activities section. If your SOTEs or SOLATEs do not appear in CourseEval, contact John Briggs, Institutional Research Analyst, at john.briggs@sjsu.edu.

A Faculty Member's tasks include, but are not limited to:

- Uploading materials
- Editing profile information
- Sending emails and optional responses (or rebuttals)

OVERVIEW OF MINI REVIEW

Purpose of Review

The primary purpose of the periodic evaluation or "mini review" is to provide probationary faculty with an annual assessment of the progress they have made toward earning tenure and promotion. These reviews are formative, providing the probationary faculty with review of the 3 categories of achievement in University Policy S15-8, so as to encourage professional growth that will merit the award of tenure, and advancement in rank if applicable, by the end of the probationary period.

Who Is Evaluated During Probationary Faculty Periodic Evaluations?

All probationary faculty who have not undergone a performance review (retention, tenure, promotion) during the fall of the current academic year, shall undergo mini review unless they are first year spring new hires, are on leave, or are in the extended year of a presidentially approved extension of the probationary period.

Required Documents

All materials voluntarily archived in eFaculty since the probationary appointment start date (including service credit years) will be available to reviewers. However, candidates in Mini Review are not required to upload supporting material to eFaculty. The candidate is required to submit only the following 5 items for the purpose of the review:

1. **Annual Summary of Achievements - Probationary** [Review: Periodic Evaluation of Probationary Faculty - Mini Review]
2. **Current CV** [Uploaded in Activity tab "Curriculum Vitae (CV)"]
3. All **prior Periodic Evaluations and Performance Reviews** [Prior Evaluations and Reviews]
4. All **SOTE/SOLATEs** for the period of review [Automatically uploaded to Classes Taught at SJSU and/or Additional Student Evaluations]
5. All **Direct Observations of Teaching** (or equivalent) for the period of review [Direct Observations]

Evaluation Process

Periodic evaluations do not include voting on or stating levels of achievement (i.e. unsatisfactory, baseline, good, or excellent), or result in recommendations for retention, tenure, or promotion. *However, if evaluators are concerned about progress to date, they may recommend that a candidate undergo a performance review (retention review) the following year.*

Department Level

A Department **committee** of tenured faculty **elected** by the probationary and tenured faculty conducts a formative evaluation as described above. If the Department Chair is **not** part of the committee, the Chair may submit a separate formative evaluation.

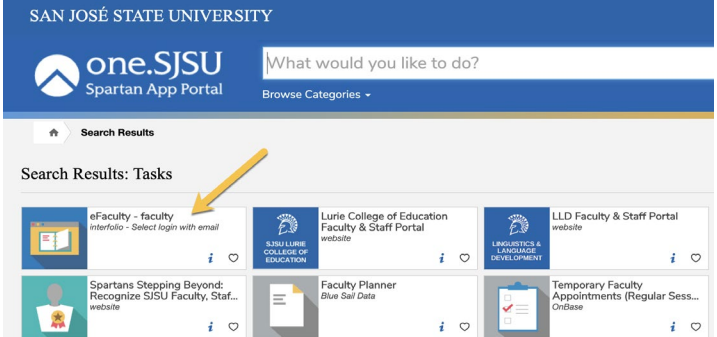
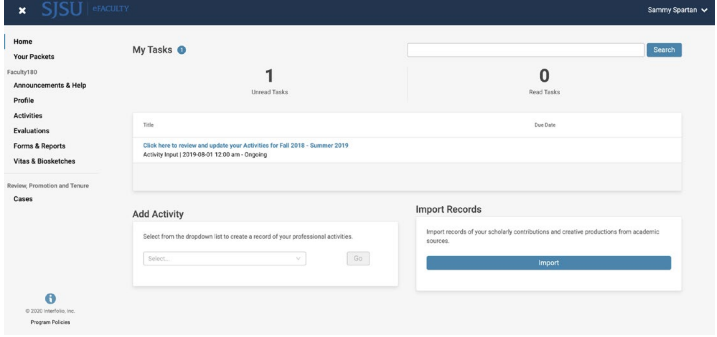
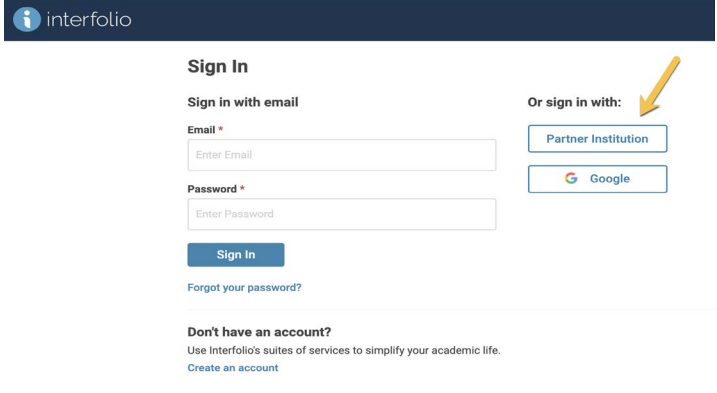
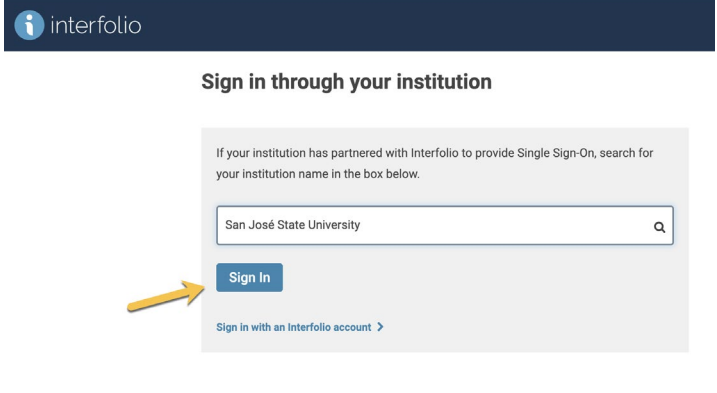
Within ten calendar days of the department level evaluation, the faculty member may submit a response/rebuttal to the Department's evaluation(s).

College Level

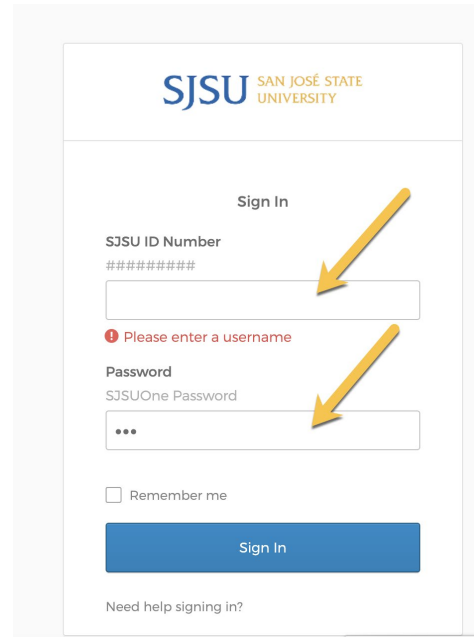
All "mini review" faculty are also evaluated by the appropriate administrator (the dean or designated administrator). A copy is provided to the faculty member and the department. Within ten calendar days, the faculty member may then respond to and/or rebut the evaluation.

The WPAF is then added to the faculty member's PAF.

LOGGING IN TO eFACULTY

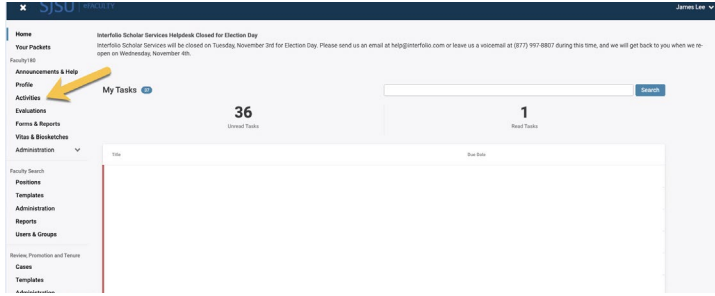
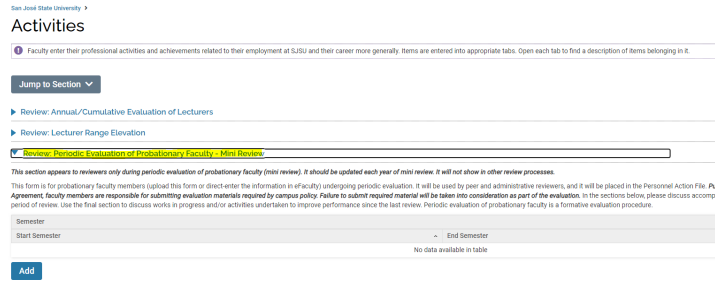
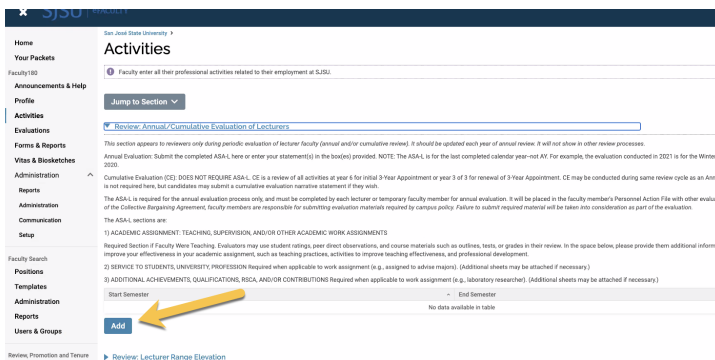
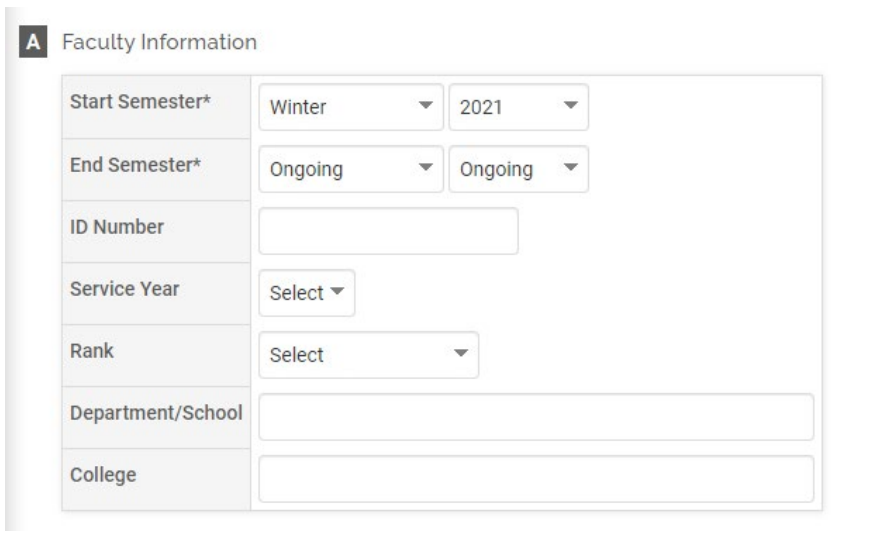
<p>1. Log in through https://one.sjsu.edu/ and search for “eFaculty”</p>	 <p>The screenshot shows the 'SAN JOSÉ STATE UNIVERSITY' Spartan App Portal. A search bar at the top contains the text 'What would you like to do?'. Below the search bar, the results are categorized under 'Search Results: Tasks'. A yellow arrow points to the first result, 'eFaculty - faculty interfolio - Select login with email', which includes an information icon and a heart icon.</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.</p>	 <p>The screenshot shows the eFaculty homepage for a user named 'Sammy Sparta'. The 'My Tasks' section displays '1 Unread Tasks' and '0 Read Tasks'. Below this, there is a task card for 'Click here to review and update your Activities for Fall 2018 - Summer 2019'. The 'Add Activity' section has a dropdown menu and a 'Go' button. The 'Import Records' section has an 'Import' button.</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>	 <p>The screenshot shows the Interfolio 'Sign In' page. It has a 'Sign in with email' section with fields for 'Email' and 'Password', and a 'Sign In' button. To the right, the 'Or sign in with:' section has a yellow arrow pointing to the 'Partner Institution' button, with a 'Google' button below it. There are also links for 'Forgot your password?' and 'Don't have an account? Create an account'.</p>
<p>4. Enter “San José State University” and select “Sign In.”</p>	 <p>The screenshot shows the 'Sign in through your institution' page. It has a search box with 'San José State University' entered. A yellow arrow points to the 'Sign In' button below the search box. There is also a link for 'Sign in with an Interfolio account'.</p>

- 5. Enter your SJSU Credentials
- 6. Follow through with Duo 2-Factor Authentication.

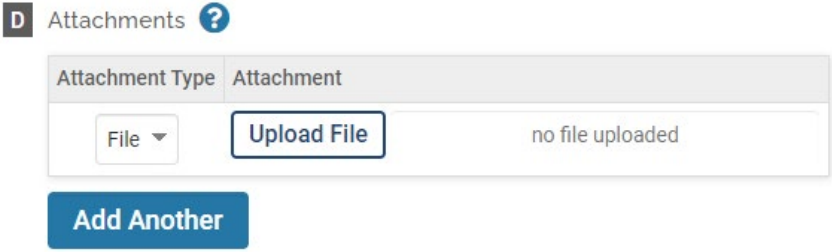


ENTERING MATERIAL INTO EFACULTY

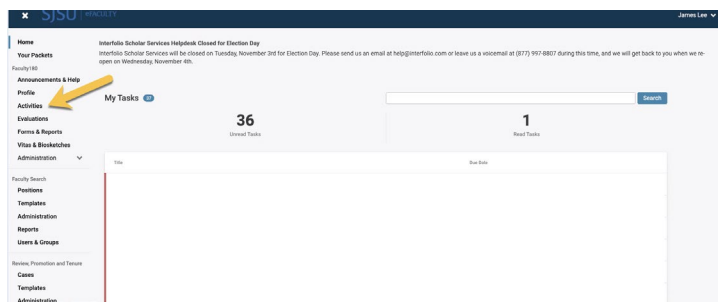
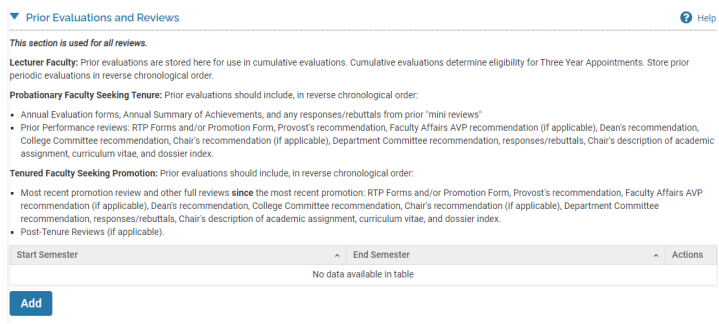
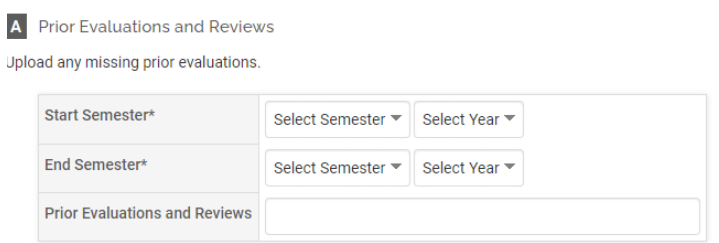
FILLING OUT THE ASA - P

<p>1. Select “Activities” on the left navigation bar.</p>	
<p>2. The Activities section will display. Select “Review: Periodic Evaluation of Probationary Faculty - Mini Review”.</p>	
<p>3. Then select “Add”</p>	
<p>4. Direct Entry of ASA-P In Section “A”, enter your Start Semester (appointment start semester or semester in which you last submitted for mini review or RTP), End Semester (Semester the current review is due) SJSU ID Number, Probationary Service Year, Rank, Department/School, and College.</p> <p>Uploading ASA-P In Section A, only enter the Start Semester (appointment start semester or semester in which you</p>	

<p>last submitted for mini review or RTP) and End Semester (Semester the current review is due). Then skip to Section D.</p> <p>Fill in the Annual Summary of Achievements - Probationary Faculty, and upload to Section “D”.</p>																						
<p>5. This is an example of Section A.</p>	<p>A Faculty Information</p> <table border="1"> <tr> <td>Start Semester*</td> <td>Fall</td> <td>2018</td> </tr> <tr> <td>End Semester*</td> <td>Ongoing</td> <td>Ongoing</td> </tr> <tr> <td>ID Number</td> <td colspan="2">012345678</td> </tr> <tr> <td>Service Year</td> <td colspan="2">3</td> </tr> <tr> <td>Rank</td> <td colspan="2">Assistant Professor</td> </tr> <tr> <td>Department/School</td> <td colspan="2">Accounting & Finance</td> </tr> <tr> <td>College</td> <td colspan="2">BUS</td> </tr> </table>	Start Semester*	Fall	2018	End Semester*	Ongoing	Ongoing	ID Number	012345678		Service Year	3		Rank	Assistant Professor		Department/School	Accounting & Finance		College	BUS	
Start Semester*	Fall	2018																				
End Semester*	Ongoing	Ongoing																				
ID Number	012345678																					
Service Year	3																					
Rank	Assistant Professor																					
Department/School	Accounting & Finance																					
College	BUS																					
<p>6. Direct Entry of ASA-P In Section “B”, you may complete the ASA-P directly in eFaculty.</p> <p>Uploading ASA-P Skip Section B.</p> <p>Note: If you need to exit eFaculty prior to completing the ASA-P, make sure to click “Save” at the bottom of the page as eFaculty does not automatically save work.</p>	<p>B Annual Summary of Achievements - Probationary Faculty</p> <p>The Annual Summary of Achievements - Probationary (ASA-P) may be typed in the text boxes provided here, or it may be uploaded as an attachment. If uploading the ASA-P, please note that PDF "scroll boxes" do not display properly if text extends beyond the visible area. It may be better to use a different file type.</p> <table border="1"> <tr> <td>EFFECTIVENESS IN ACADEMIC ASSIGNMENT (TEACHING)</td> <td></td> </tr> <tr> <td>SERVICE</td> <td></td> </tr> <tr> <td>SCHOLARLY/ARTISTIC/PROFESSIONAL ACHIEVEMENT</td> <td></td> </tr> <tr> <td>WORKS IN PROGRESS AND/OR PERFORMANCE IMPROVEMENT ACTIVITIES</td> <td></td> </tr> </table>	EFFECTIVENESS IN ACADEMIC ASSIGNMENT (TEACHING)		SERVICE		SCHOLARLY/ARTISTIC/PROFESSIONAL ACHIEVEMENT		WORKS IN PROGRESS AND/OR PERFORMANCE IMPROVEMENT ACTIVITIES														
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WORKS IN PROGRESS AND/OR PERFORMANCE IMPROVEMENT ACTIVITIES																						
<p>7. Direct Entry of ASA-P In Section “C”, indicate your affirmation that the information in your ASA-P is true and accurate to the best of your knowledge.</p>	<p>C Affirmation: I affirm that the information contained in this Annual Summary of Achievements - Probationary (ASA-P) is true and accurate to the best of my knowledge. I have uploaded supporting evidence in eFaculty and understand that reviewers may access all items in eFaculty to perform their formative evaluation duties.</p> <p>Place a check next to "yes" to indicate your agreement with the statement.</p> <p>Affirmation <input type="checkbox"/> Yes <input type="checkbox"/> No</p>																					

<p>Uploading ASA-P Skip Section C.</p>	
<p>8. Direct Entry of ASA-P In Section “D”, upload any other documents you may want to include in this section. Then select “Save”.</p> <p>Uploading ASA-P Select “Upload File” and attach the ASA-P from your local computer. Add any other documents for this tab, then select “Save.”</p>	

PRIOR EVALUATIONS

<p>1. Select “Activities” on the left navigation bar.</p>	
<p>2. Select “Prior Evaluations and Reviews” and then select “Add”.</p>	
<p>3. In Section “A,” provide the start and end semesters of that evaluation’s academic year. For example, if submitting a mini review conducted in spring 2019, the corresponding AY would be 2018-2019 The start semester would be Fall 2018 and the end semester would be Spring 2019. (The few faculty whose first semester of employment was a spring semester, would report that spring semester as their start semester for their very first mini review.)</p>	

4. Upload the prior evaluation in Section “B”, and then select “Save and Go Back” or “Save and Add Another.”.

CURRENT CV

5. Select “Activities” on the left navigation bar.

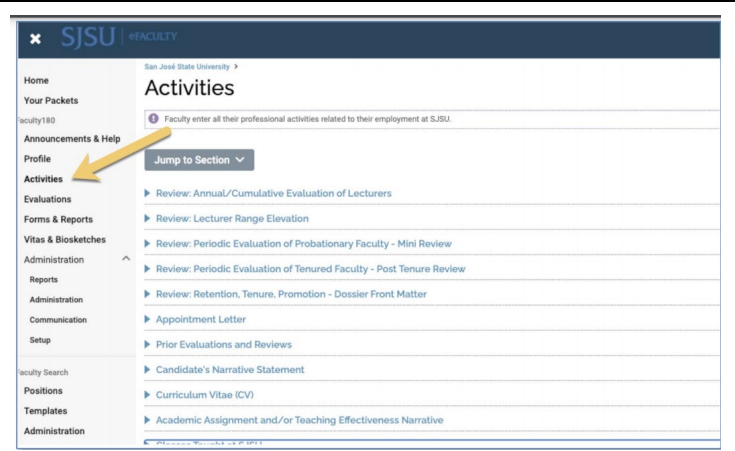
6. Select “Curriculum Vitae (CV)” and select “Add”.
Note: You may wish to delete prior versions of the vita.

7. In Section “A”, date stamp the vita with start and end semesters that correspond with the current academic year. You may enter a title for the vita in “Field 1” or leave that blank.

8. In Section “B” attach the CV using the Upload File function. Once completed, click “Save and Go Back”.

FIND, ADD, REMOVE SOTEs/SOLATES

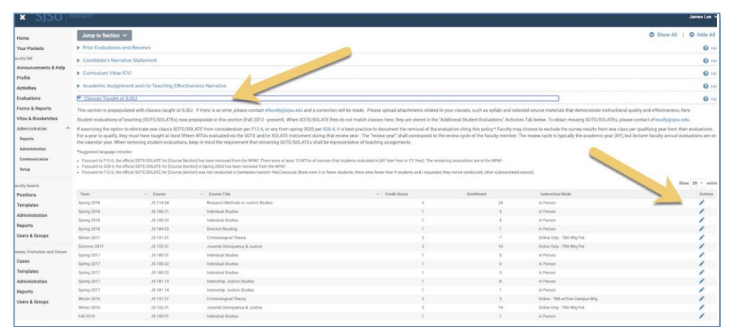
1. Select "Activities" under Faculty 180.



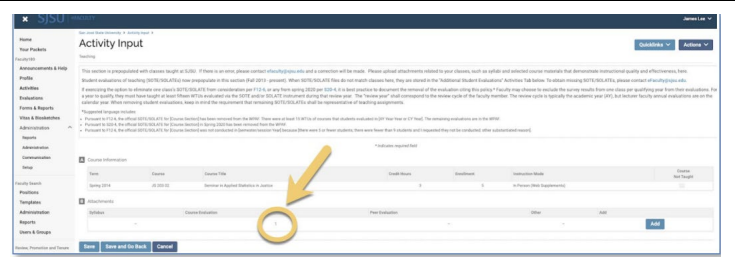
2. Select "Classes Taught at SJSU" Under the "classes taught" tab, there will be a list of the classes you taught.

3. Select the pencil icon on the right side of the course row for those courses that had student evaluations.

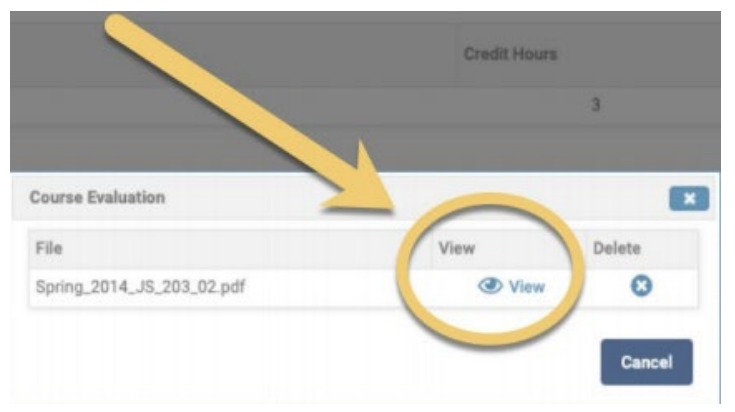
Note: Errors in classes taught may be identified for reviewers in semester notes or corrected by sending a request to efaculty@sjsu.edu.

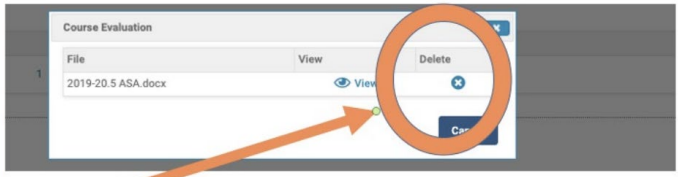

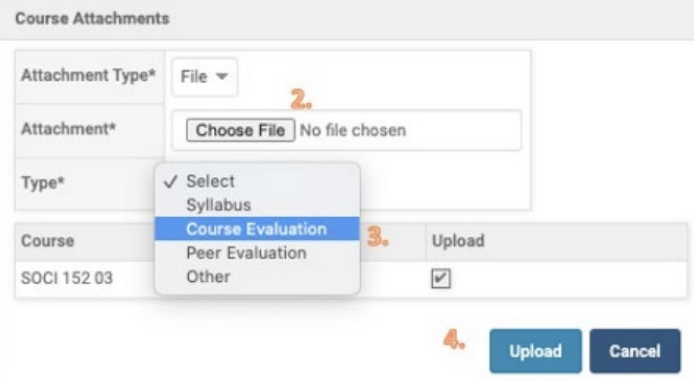
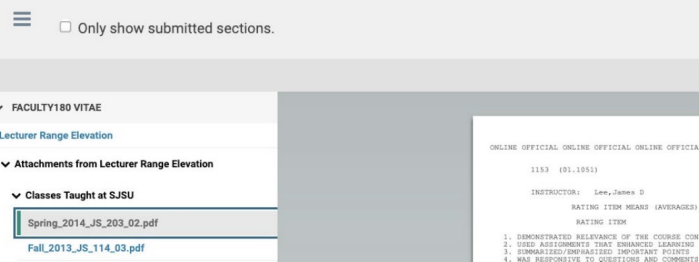


4. The SOTE or SOLATE file is underneath the hyperlinked number under the header "Course Evaluation." The number is slightly misaligned with the header. A dash indicates there is no file there (No SOTE/SOLATE).



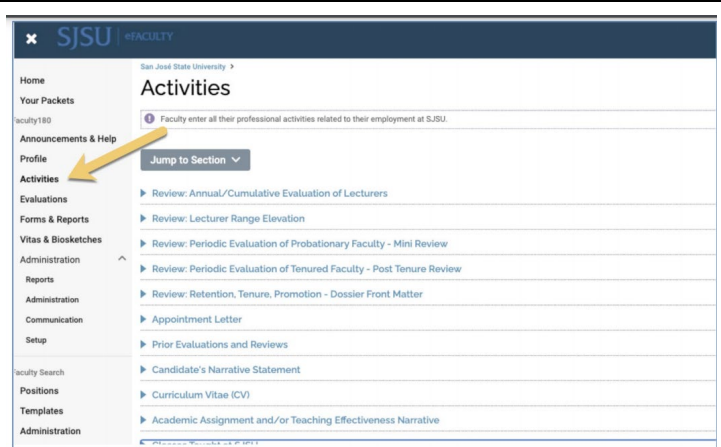
5. Select the blue eyeball to open or download your SOTE/SOLATE file.



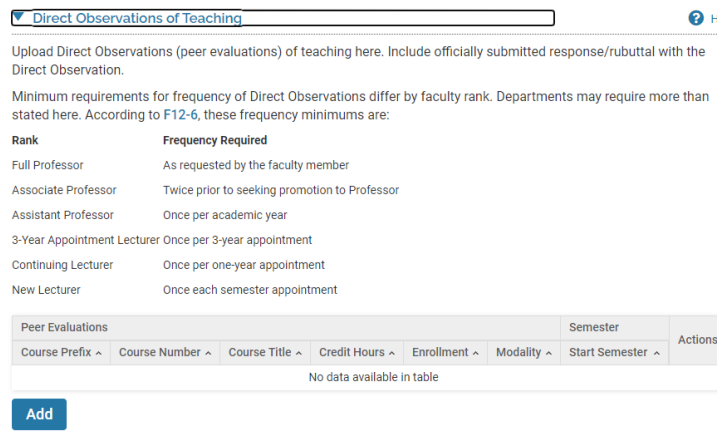
<p>6. Select "X circle" to delete a SOTE or SOLATE file.</p>	
<p>7. To add a SOTE/SOLATE (or memo explaining removal of a SOTE/SOLATE) select "Add" (#1)</p>	
<p>8. Choose the file (#2), Select "Course Evaluation" (#3), and select "Upload" (#4)</p>	
<p>9. Note: Reviewers will not have so much trouble locating your SOTE/SOLATES. The image to the right shows the perspective of reviewers in RPT. Reviewers will see file names in the left bar, and the file will open in the PDF reader.</p>	

DIRECT OBSERVATIONS

1. Select "Activities" under Faculty 180.

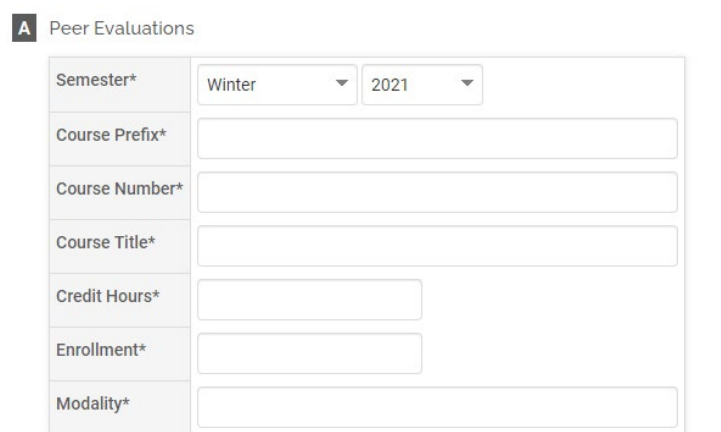


2. Select "Direct Observations of Teaching" and click "Add".



3. In Section "A", enter information for the class that was observed by the peer faculty member.

Note: If you have trouble remembering the class information, you may find it in "Classes Taught at SJSU."

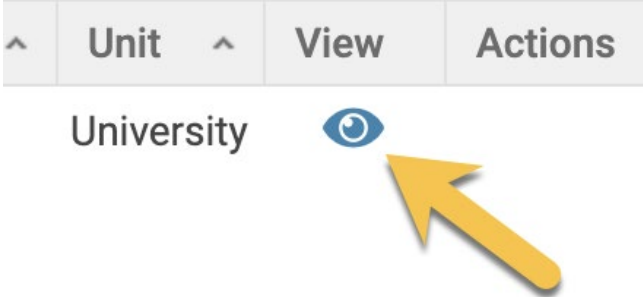
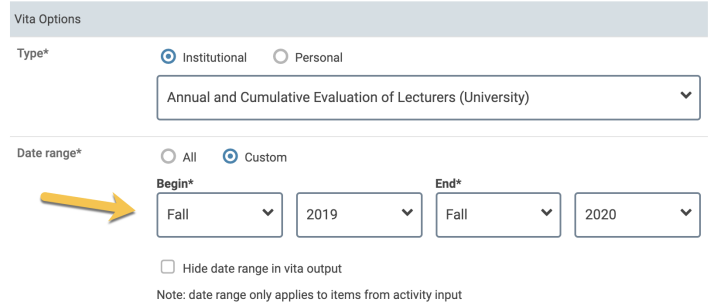



<p>4. In Section “B” attach the Direct Observation. Once completed, click “Save and Go Back”.</p>	
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PREVIEW MATERIALS IN FACULTY 180

<p>1. Select “Vitas and Biosketches” in the Faculty 180 sidebar (Warning: familiar academic idioms often carry different meanings in eFaculty. Here, “vita” is a technical term for the Interfolio summary document created from FAR, minus attachments). In the dropdown menu, select “Legacy Vitas”.</p>	
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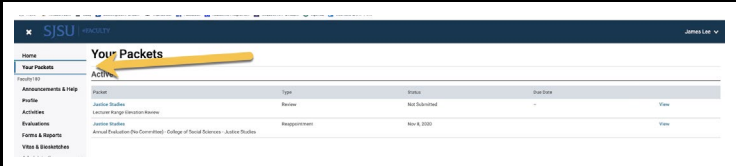
<p>1. Select “Vita Admin”, scroll down, and select the blue eyeball that corresponds to “Periodic Evaluation of Probationary Faculty - Mini Review”.</p>	
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<p>2. Select the start date and end date of your Mini Review Period. For mini review, select your official start semester (inclusive of prior service years) and the current review semester as the end date.</p>	
<p>3. Select Refresh Vita</p>	

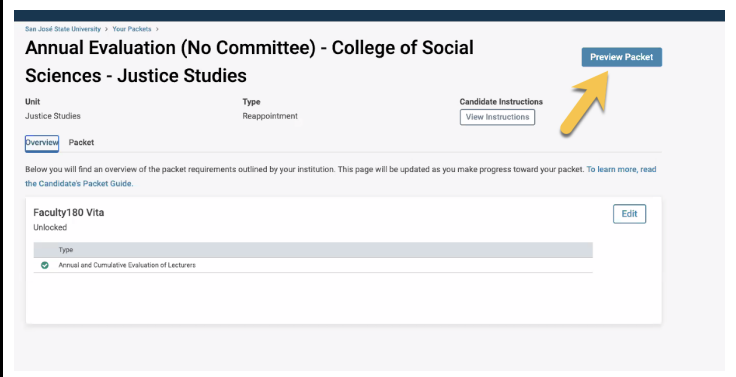
PREVIEW AFTER PACKET IS GENERATED

1. Note: After a eFaculty administrator has created a case for review (i.e., linked RPT to FAR and generated a packet) you will have access to the reviewer’s interface until the packet is submitted by you or locked by the evaluators (i.e., submission deadline).

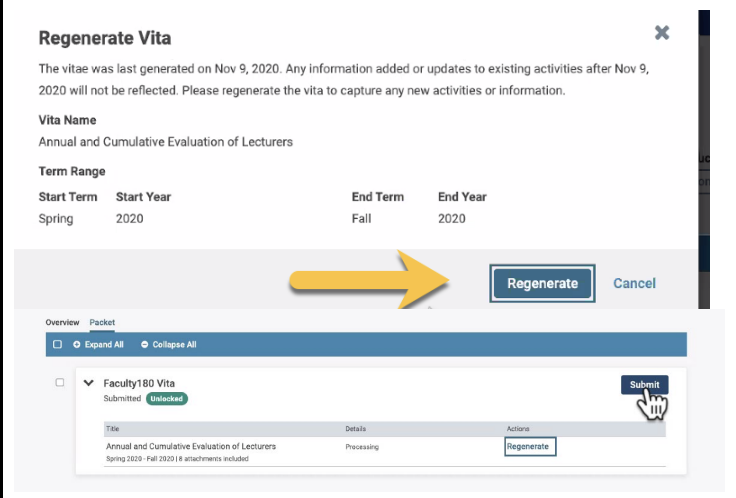
2. Select “Your Packets” in the upper left sidebar.



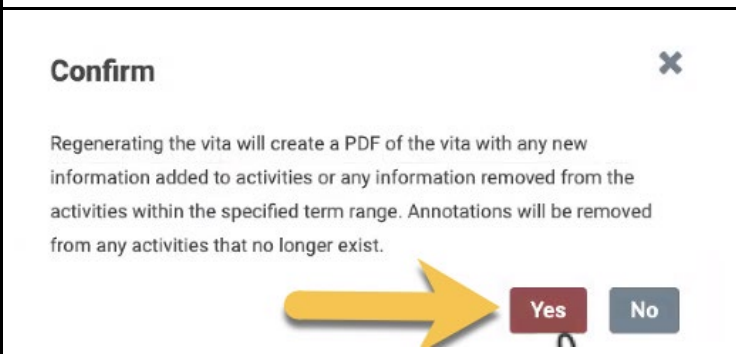
3. Select “Preview Packet.” Your dossier, complete with any attachments pulled in from Faculty180, will be viewable from reviewers’ perspective in the RPT (PDF) reader.



4. When you see things you want to change, you should go back and revise accordingly. Upon making changes to the material, you will need to “regenerate” the “vita” in order to transfer the new material to the RPT reader—it does not update automatically. If your “vita” is marked as “Unlocked,” you should see an option to regenerate the vita. Select “Regenerate.”

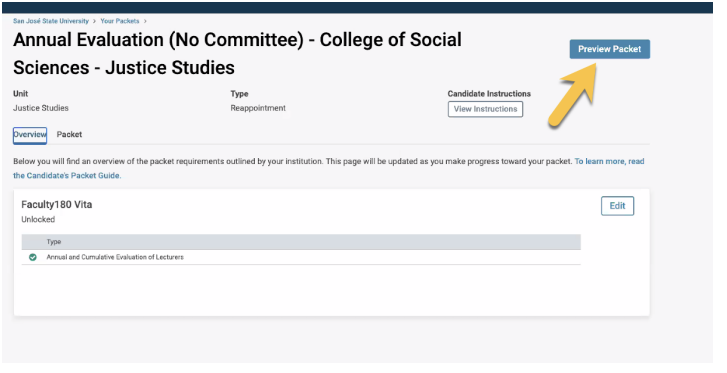


5. Then confirm and select “Yes”

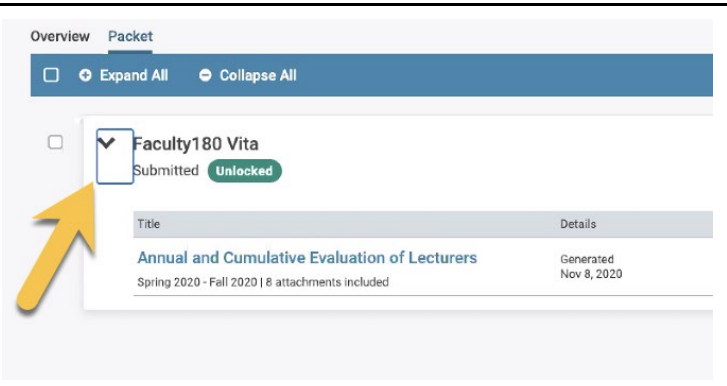


REGENERATE AND SUBMIT THE DOSSIER

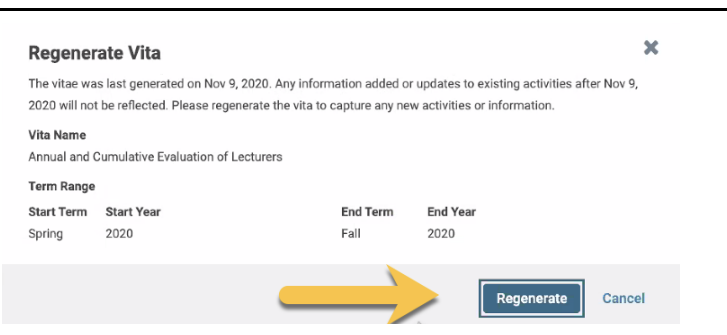
1. When you are ready to submit the dossier, meaning letting your department know you are finished uploading material for review, select "Your Packets" to view the packet.



2. Select "Expand All" or the ">" icon left of "Faculty180 Vita"

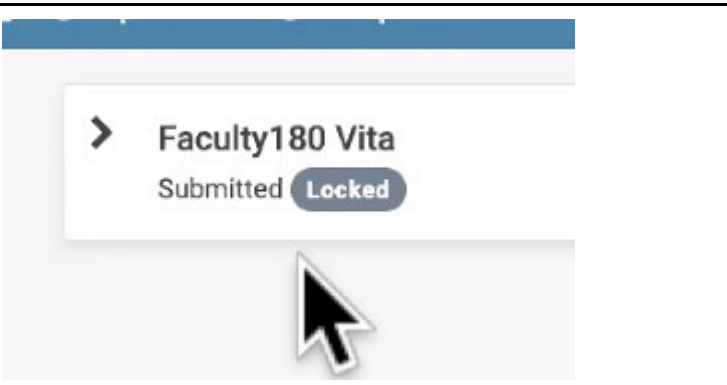


3. Select "Regenerate" in the bottom right of the Faculty180 Vita field (under Actions).



4. Submitting the dossier will lock it, preventing further changes from taking place (unless an administrator unlocks the file). Always "Regenerate" prior to submitting a packet. Preview your materials. Then submit if they are correct.

Note: The system takes time to process so there will be a delay before you can see changes.



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-FS at efaculty@sjsu.edu.
- For Open Lab Hours, visit the [eFaculty Training Schedule](#).
- For FAQs related to eFaculty Training, [eFaculty Training FAQ](#).
- General help and solutions to problems, including QuickTips, are at the [eFaculty Training and Help](#) web page.