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This guide is intended to assist tenured faculty with using the eFaculty system primarily for post tenure review. It explains the setup and management of cases using eFaculty, and it provides instructions for adding career information and evidence of success for post tenure 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 Post-Tenure Review materials will be conducted within the RPT module).

- **Candidate:** eFaculty refers to the individual being reviewed as a Candidate. "Candidate" and "Tenured 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 users and standing committees. Follow this guide thoroughly on how to perform tasks as an eFaculty Administrator. ***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 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 "ˈdäsēˌā." 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 - FS 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 Post-Tenure 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., Post-Tenure 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 faculty member 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 candidate 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 candidate 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.

TENURED FACULTY ROLE & TASKS

Tenured 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 CoursEval. You can also upload any missing SOTEs and SOLATEs to your activities section. If your SOTEs or SOLATEs do not appear in CoursEval, contact John Briggs, Institutional Research Analyst, at john.briggs@sjsu.edu.

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

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

OVERVIEW OF POST TENURE REVIEW

Purpose

Post tenure review is specified in the Collective Bargaining Agreement (CBA) Article 15.35: *For the purpose of maintaining and improving a tenured faculty unit employee's effectiveness, tenured faculty unit employees shall be subject to periodic performance evaluations at intervals of no greater than five (5) years.*

Faculty Review Guidelines

University policy, S97-5, sets the parameters for Post Tenure Review. Faculty may provide evidence for evaluation in any of the following 4 areas:

1. Evaluations of Teaching
2. Professional Currency
3. Reflective Model
4. Other Materials

What to Submit to eFaculty and Where

In this transition period, with some PTR faculty being new to eFaculty, we are permitting all PTR items to be uploaded to this eFaculty Activities Tab: "Review: Periodic Evaluation of Tenured Faculty - Post Tenure Review." This section addresses where the items would normally be placed in the eFaculty dossier.

Required Items

Faculty must upload (or update) the following items in eFaculty. The appropriate eFaculty Activities tabs and suggested date stamping are below:

1. **Post Tenure Review narrative** addressing professional responsibilities, discussing items 1-4 above. Activities Tab: *Review: Periodic Evaluation of Tenured Faculty - Post Tenure Review*; use current semester for date.
2. **SOTE/SOLATEs** consistent with campus policies. All SOTE/SOLATEs from spring 2013 to present were preloaded to Activities Tab: *Classes Taught at SJSU* or *Additional Student Evaluations*

Other Item Options

eFaculty provides many other options for faculty preparing a more fulsome dossier for post tenure review. Select other options and appropriate eFaculty Activities tabs and suggested date stamping are below:

1. **Appointment Letter**, including addenda. Tab: *Appointment Letter*; use ongoing or current semester for end semester.
2. **Last Evaluation or Review**, RTP or PTR prior to this review. Tab: *Prior Evaluations and Reviews*; date stamp the item within the current review period.
3. **Curriculum Vitae** Tab: *Curriculum Vitae (CV)*; use "ongoing" or current semester as end semester.
4. **Direct Observations of Teaching** Tab: *Direct Observations of Teaching*; date stamp with semester of observation.
5. **Other materials and evidence** to demonstrate effectiveness in the three areas of professional responsibility: 1) Academic assignment and/or teaching, 2) Service, and 3) Research, scholarship, and creative activities. Tab: Place in *Activities* tabs as appropriate; use dates to place items within period of review.

In Post Tenure Review, eFaculty will extract and display to reviewers only those items "date stamped" as within the period of review in any of the "Activities" tabs (excluding the other 4 "Review" tab types at the top of "Activities"). Tab labels appear to reviewers only if items during the period of review are found in the section.

Evaluation Process

Evaluators produce "summaries" of the faculty member's review, reducing their evaluations to writing for the purpose of providing helpful feedback. Faculty may respond upon receiving these summaries.

Department Level Summary

An elected committee of tenured faculty of higher rank than the subject of review (or equal if evaluating full professors) write a summary. Chairs may elect to not serve and to write a separate summary (CBA 15.21).

College Level Summary

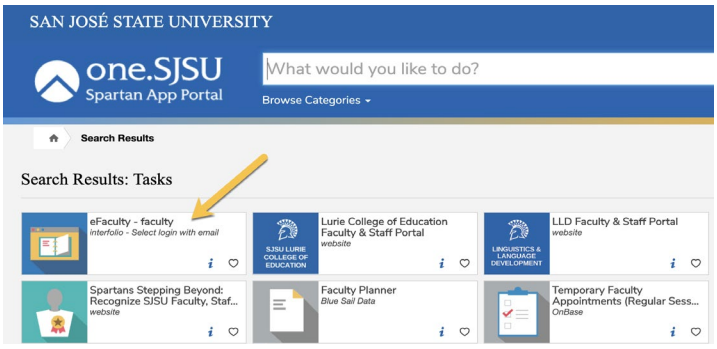
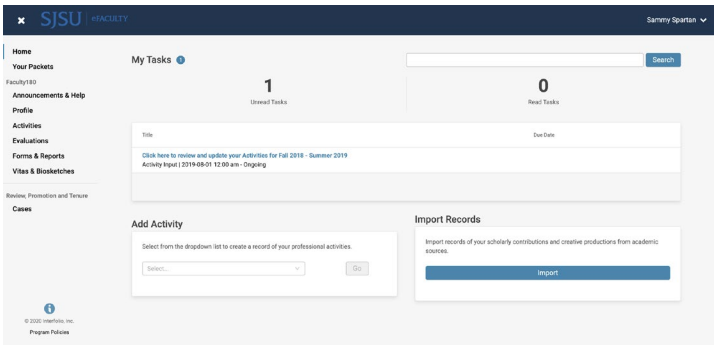
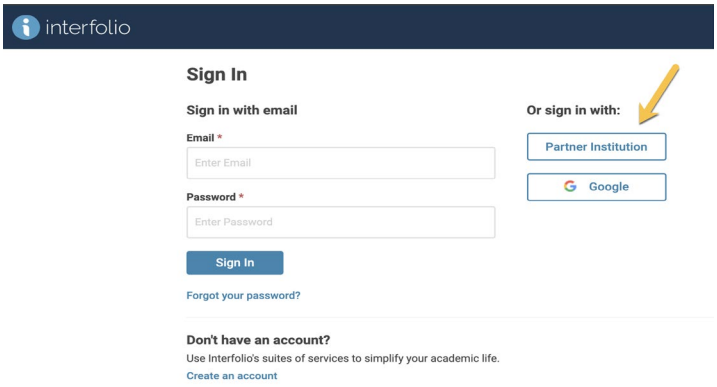
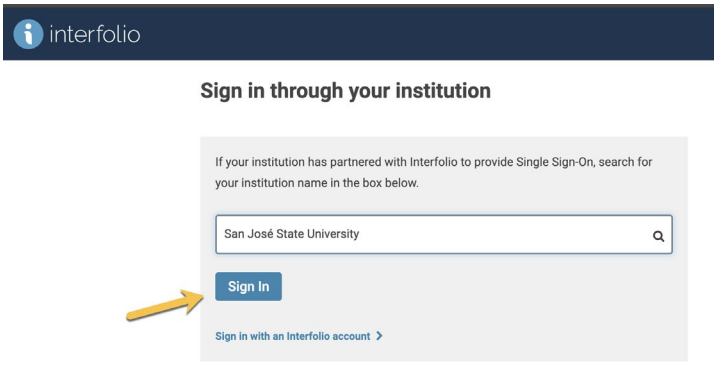
An appropriate administrator will review the evaluations and may comment on the faculty member's review, the department's summary(ies), and any faculty response to these.

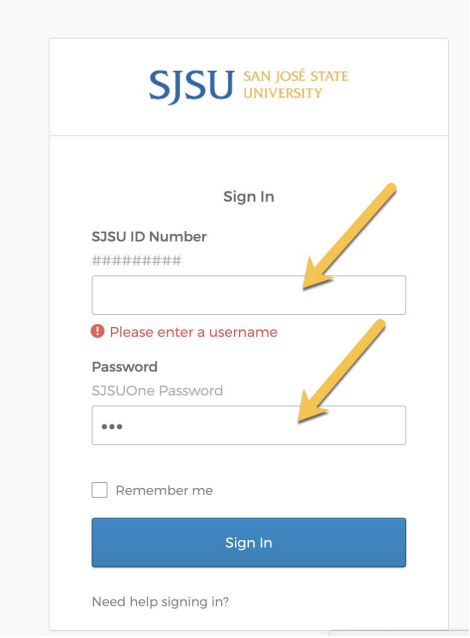
Afterward

The evaluation summaries and faculty responses are placed in the faculty member's PAF.

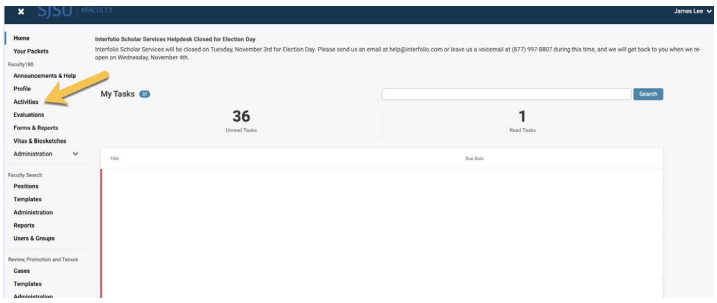
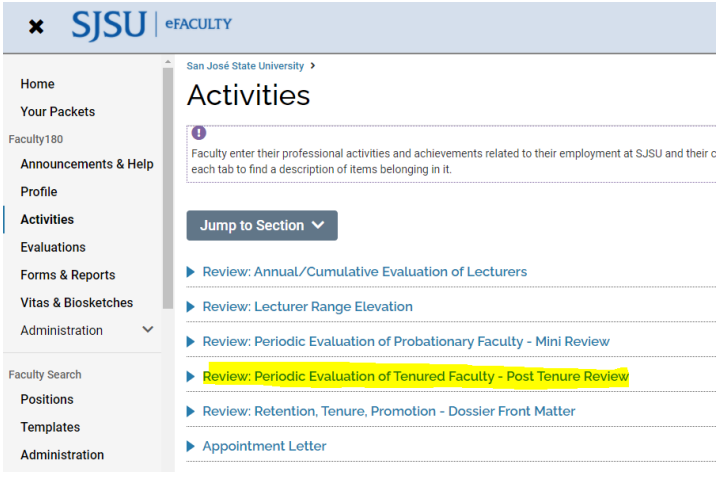
Per Article 15.36, *The peer review committee chair and the appropriate administrator shall meet with the tenured faculty unit employee to discuss [their] strengths and weaknesses along with suggestions, if any, for [their] improvement.* Per University Policy S97-5, *the department chair, in every case, shall discuss the summary with the faculty member.*

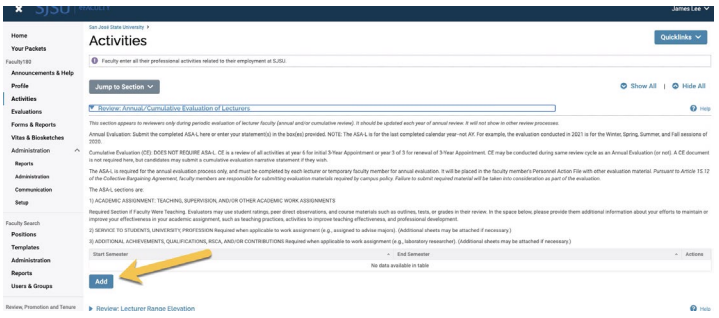
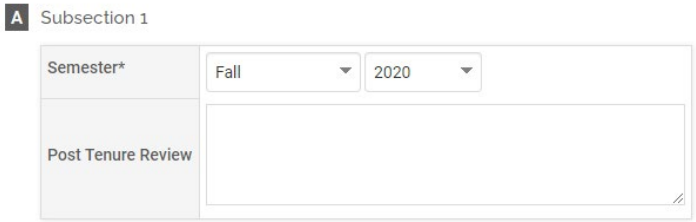
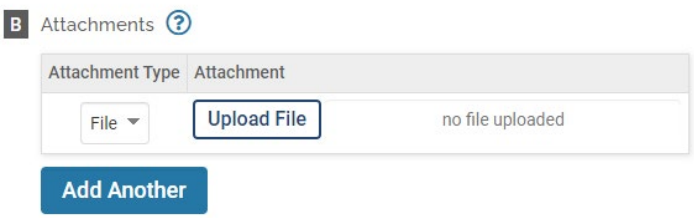
LOGGING IN TO eFACULTY

1. Log in through https://one.sjsu.edu/ and search for "eFaculty"	
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.	
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.	
4. Enter "San José State University" and select "Sign In."	

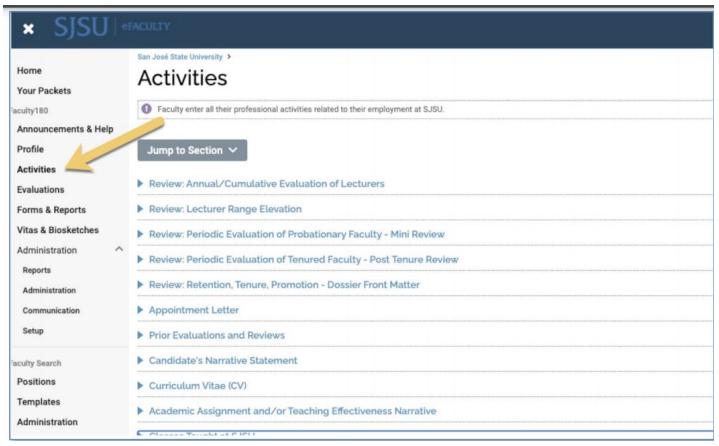
5. Enter your SJSU Credentials 6. Follow through with Duo 2-Factor Authentication.	

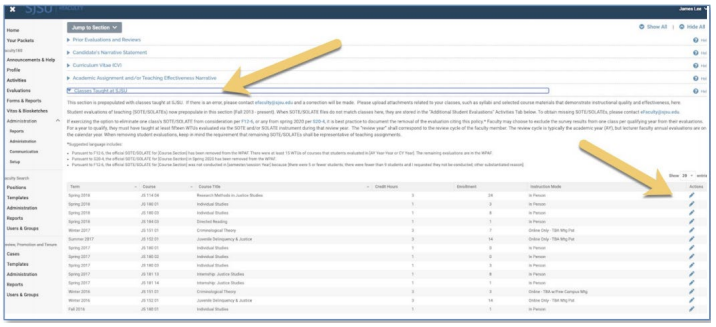
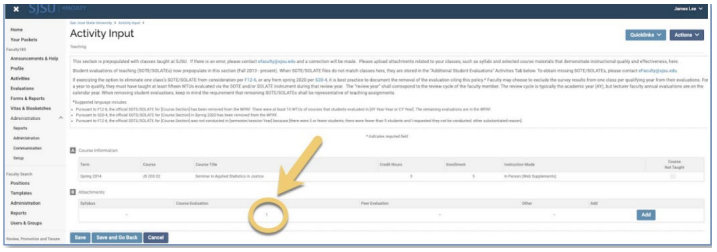
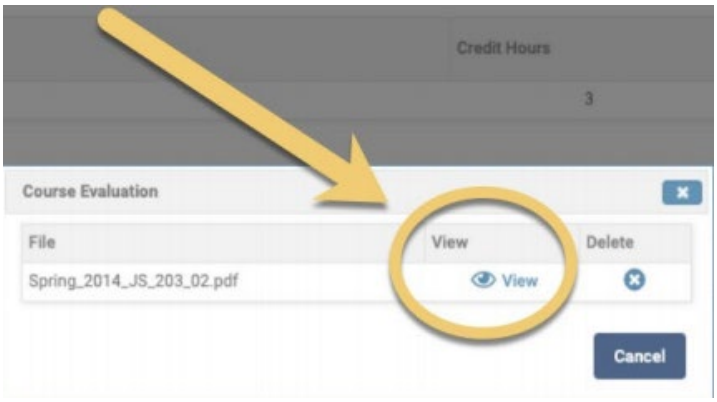
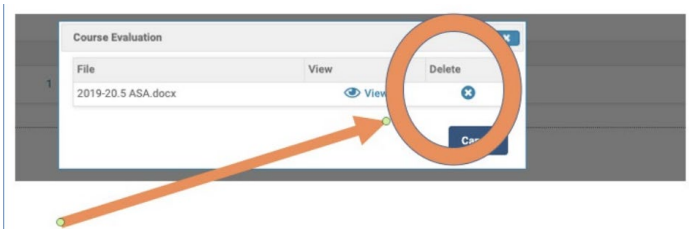
POST TENURE REVIEW NARRATIVE

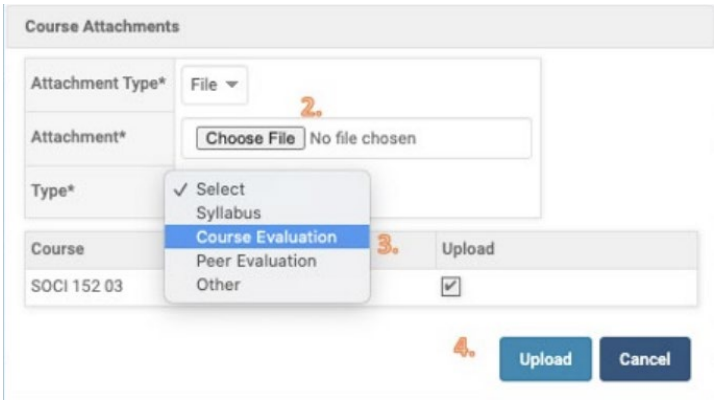
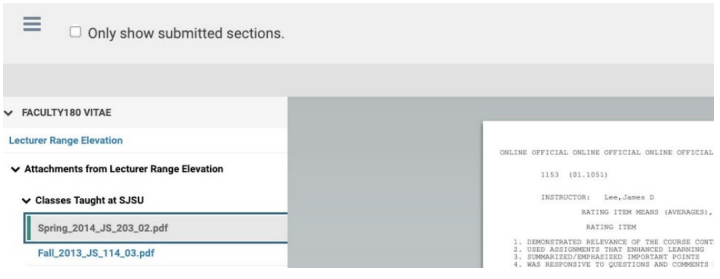
1. Select "Activities" on the left navigation bar.	
2. The Activities section will display. Select "Review: Periodic Evaluation of Tenured Faculty - Post Tenure Review".	

3. Then select "Add"	
4. In Section "A", enter the semester. If you would like, you may write your review in the text box provided.	
5. In Section "B", you may upload any other materials and evidence to demonstrate effectiveness in the three areas of professional responsibility: 1) Academic assignment and/or teaching, 2) Service, and 3) Research, scholarship, and creative activities. Then select "Save".	
Note: If choosing to upload attachments, eFaculty is most compatible with Microsoft Word files, and may have difficulty with PDF files.	

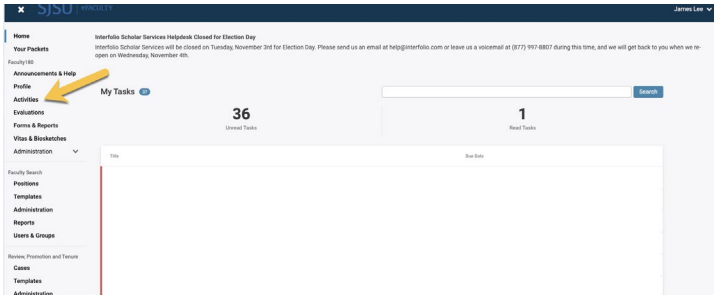
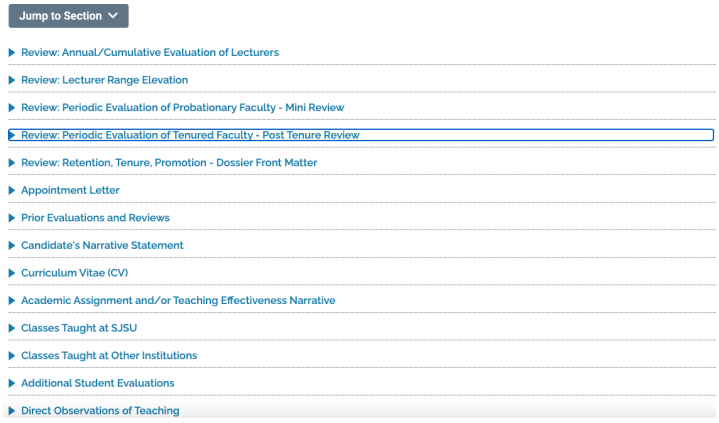
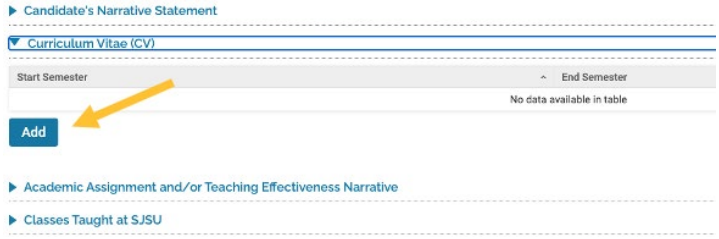
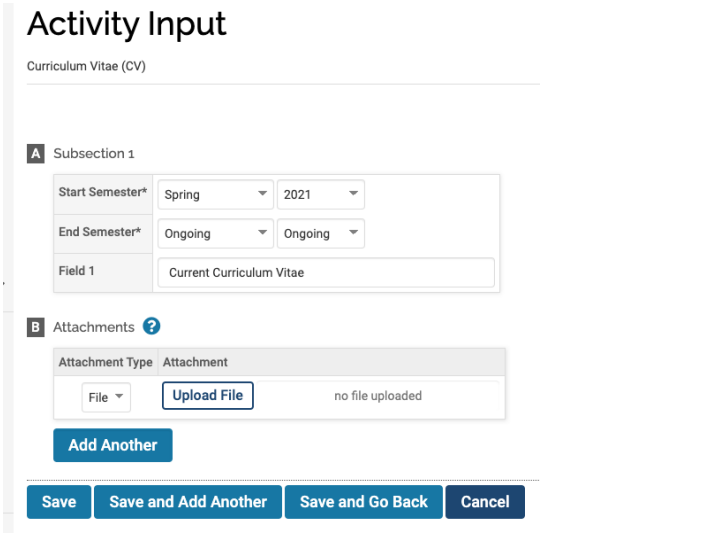
FIND, ADD, REMOVE SOTEs/SOLATEs

1. Select "Activities" under Faculty 180.	

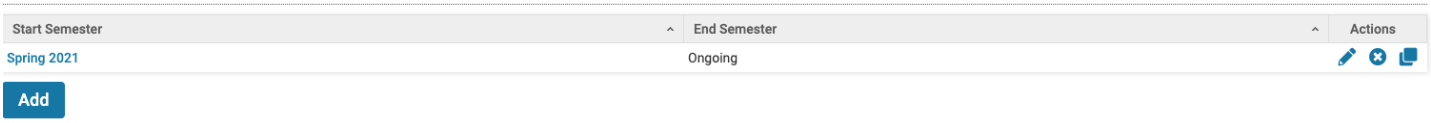
2. Select "Classes Taught at SJSU" Under the "classes taught" tab, there will be a list of the classes you taught. Select the pencil icon on the right side of the course row for those courses that had student evaluations. **Note:** Errors in classes taught may be identified for reviewers in semester notes or corrected by sending a request to efaculty@sjsu.edu.	
3. The SOTE or SOLATE file is underneath the hyperlinked number under header "Course Evaluation." The number is slightly misaligned with the header. A dash indicates there is no file in the section.	
4. Select the blue eyeball to open or download your SOTE/SOLATE file.	
5. Select "X circle" to delete a SOTE or SOLATE file.	
6. To add a SOTE/SOLATE (or memo explaining removal of a SOTE/SOLATE) select "Add" (#1)	

7. Choose the file (#2), Select "Course Evaluation" (#3), and select "Upload" (#4)	
8. Note: Reviewers will not have so much trouble locating your SOTE/SOLATEs. Reviewers will see file names in the left bar, and the file opens in the PDF reader.	

OTHER PTR MATERIALS

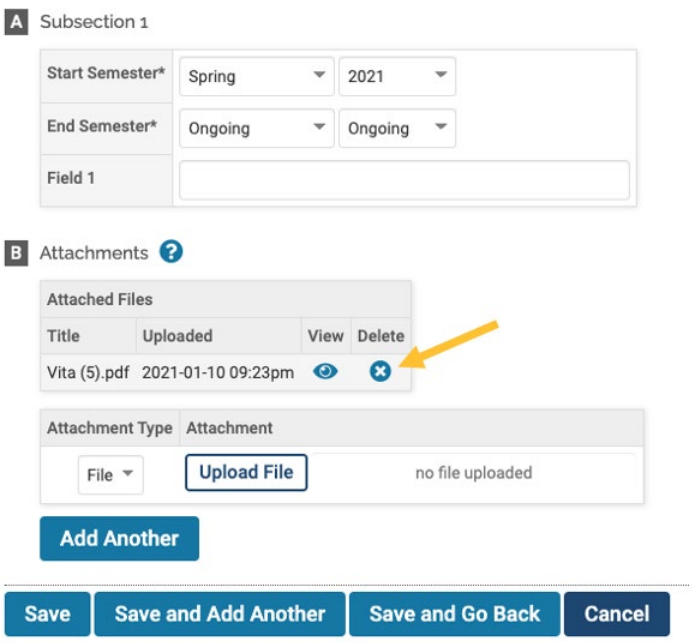
1. Select "Activities" on the left navigation bar.	
2. The Activities section will display. Select the Activities Tab that you'd like to edit. a. Appointment Letter b. Prior Evaluations and Reviews c. Curriculum Vitae (CV) d. ...and so on.	
3. Typically, the next step is to select "Add." Here, the CV is being uploaded.	
4. In Section "A" of this example, the current semester is entered as the start semester, and "ongoing" is the end semester. By selecting "Upload File," and selecting the file from the local computer, eFaculty will store a copy date stamped for the period of review. Selecting "Save and Go Back" will take one back to the Activities page.	

5. If a mistake is made, one may simply go back to a section, and click the little blue pencil icon at the far right end of the item row (below).

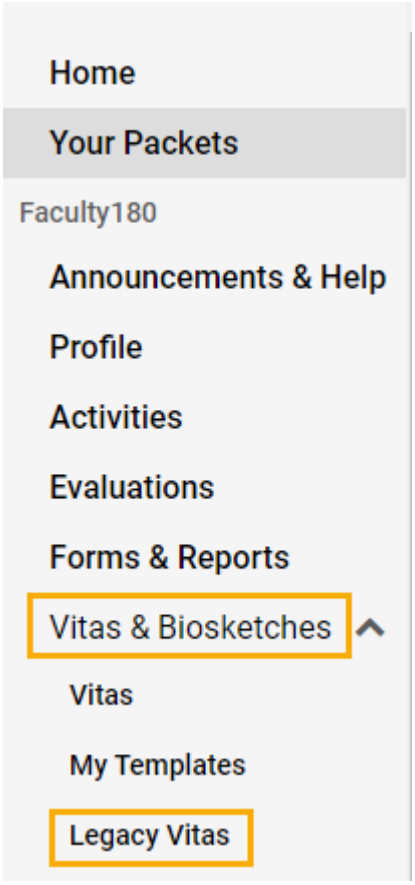
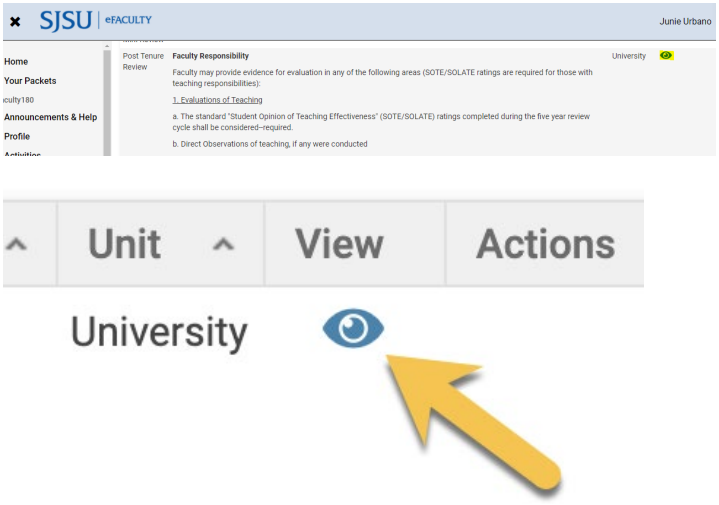


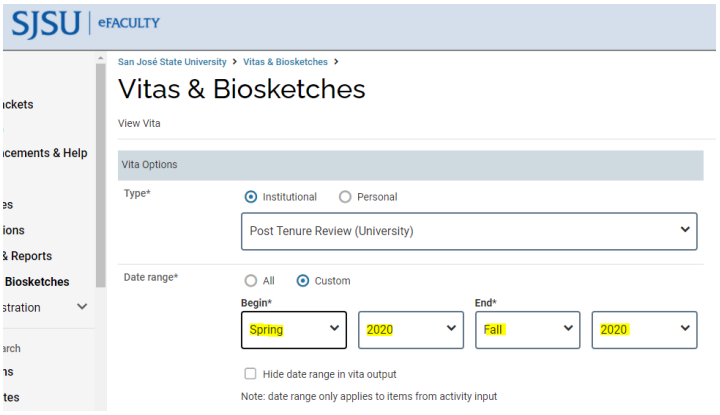
6. After opening the item, one may select the "circle x" to delete and start over or "Add Another" to place another item in the tab.

   All tabs in "Activities" have very similar control functions as demonstrated so far.



PREVIEW MATERIALS IN FACULTY 180

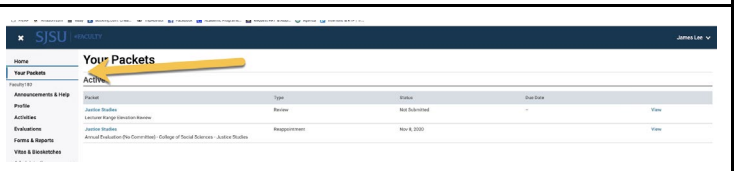
1. Select "Vitas and Biosketches" in the Faculty 180 sidebar (Warning: familiar academic idioms often carry different meanings in eFaculty. Here, "vita" is a technical term for the Interfolio summary document created from FAR, minus attachments). In the dropdown menu, select "Legacy Vitas".	
2. Scroll down and select the blue eyeball on the right-hand side of the "Post Tenure Review" section.	

3. Report the semester of one's last performance review or post tenure review as the start semester, and report the current review semester as the end semester.	
4. Select Refresh Vita	
5. To download a copy of your PTR, choose "Export/Share upon" refresh.	
6. Choose the file type you'd like for the file. A copy will be downloaded to the local computer.	

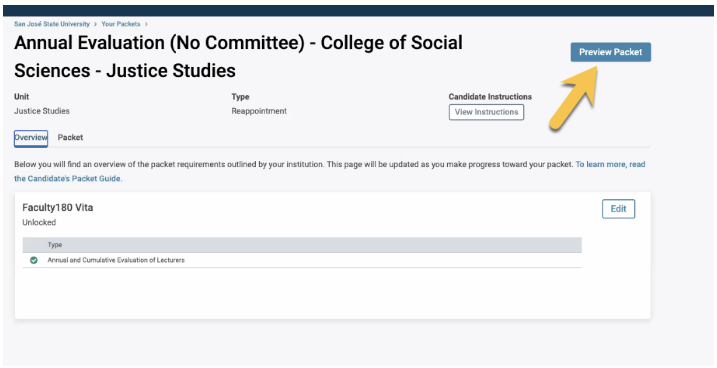
PREVIEW AFTER PACKET IS GENERATED

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

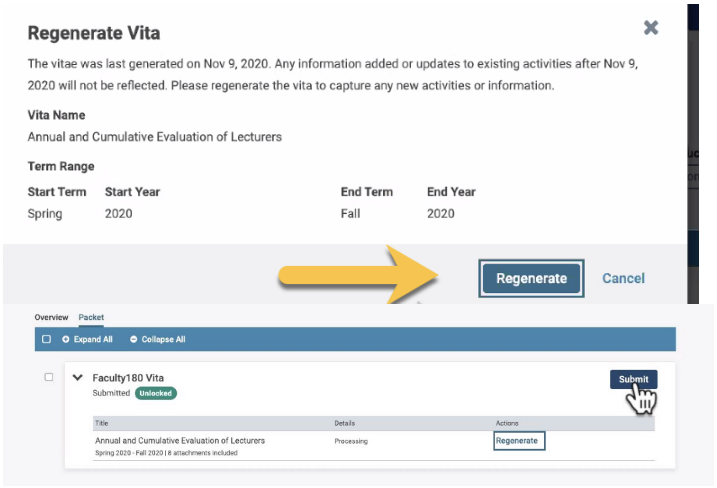
2. Select "Your Packets" in the upper left sidebar.



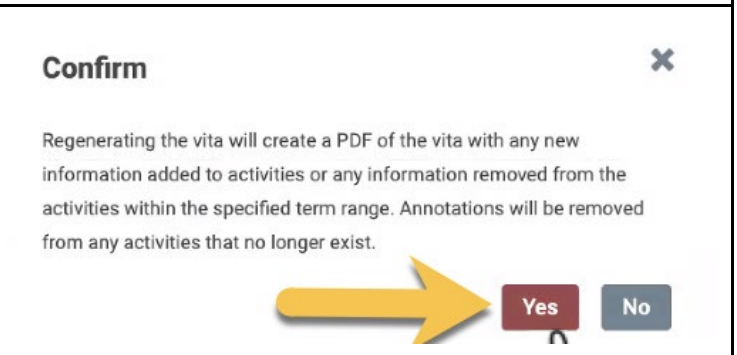
3. Select "Preview Packet." Your dossier, complete with any attachments pulled in from Faculty180, will be viewable from reviewers' perspective in the RPT (PDF) reader.



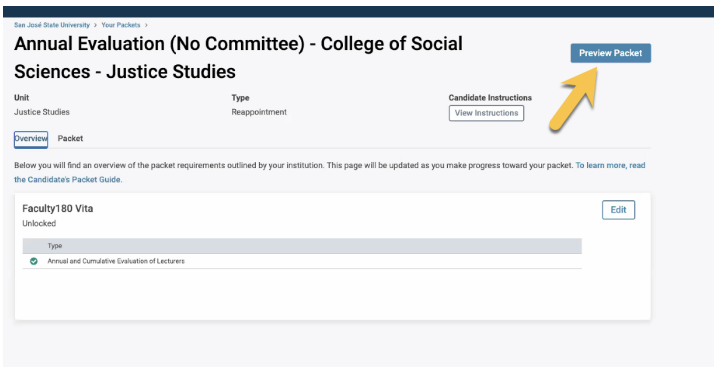
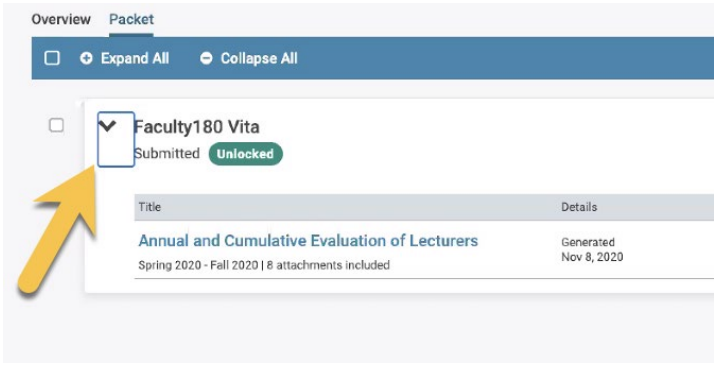
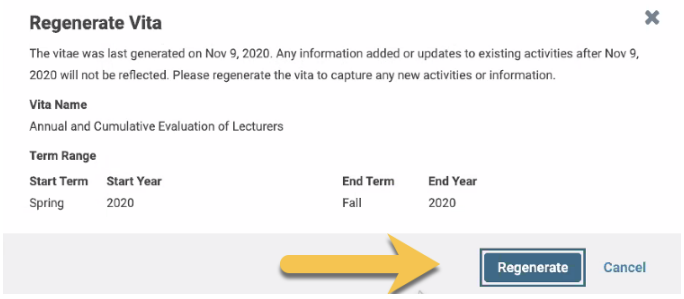
4. When you see things you want to change, you should go back and revise accordingly. Upon making changes to the material, you will need to "regenerate" the "vita" in order to transfer the new material to the RPT reader—it does not update automatically. If your "vita" is marked as "Unlocked," you should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

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 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.