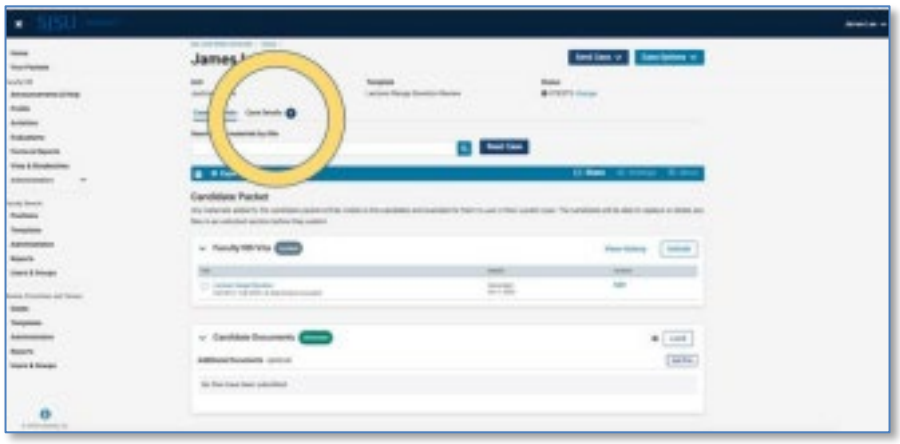
eFaculty QuickTip:
Submitting Recommendation Forms and Memos

Recommendation Forms Are Embedded in RPT

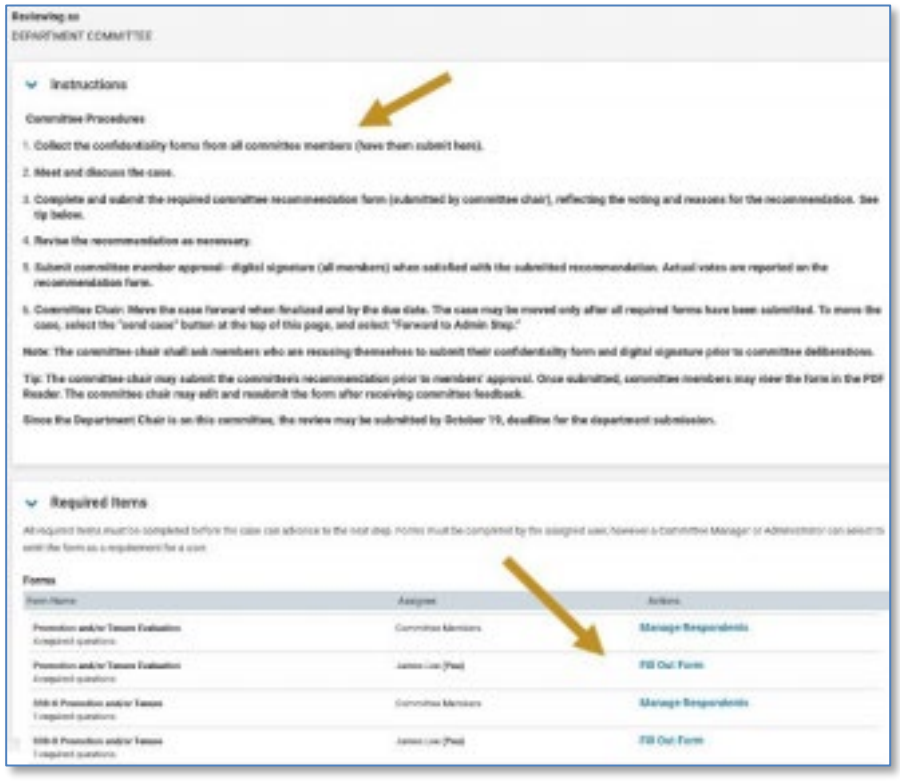
1. Open a case.
2. Find and click "case details" under the candidate's name
3. A new window will open (as seen below)

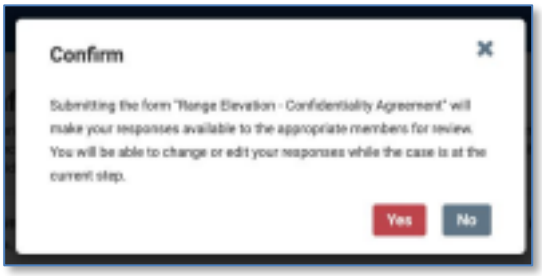


Case Details Page

This page:

1. Displays instructions on managing forms
2. Provides links for
   a. Committee Chairs to manage forms
   b. Committee members and managers to "fill out" their forms
3. Click the link to open each form.
   a. Confidentiality
   b. Evaluation (committee chair only)
   c. Digital Signature



Confidentiality Form Please fill out the confidentiality form prior to reviewing the dossier. 1. Check the agreement box at the bottom 2. Submit the form *Any submitted form may be edited prior to moving the case forward.*	
Users will be asked to confirm each form submission. Once submitted, it may be edited, but not retracted.	

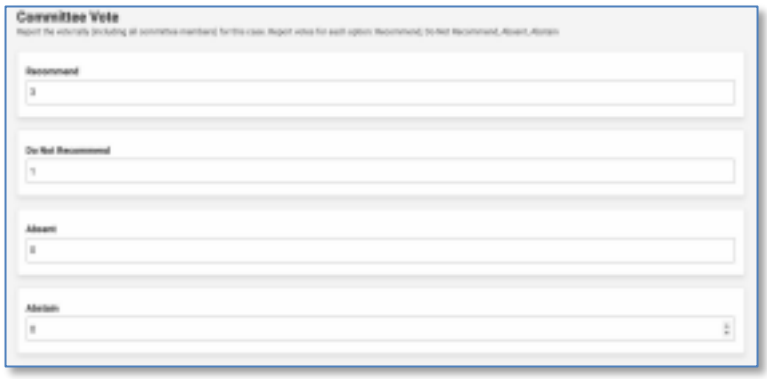
Evaluation Form

Committee Chairs ("managers" in eFaculty) are the only ones authorized to submit the evaluation form.

During deliberations, managers may submit the form if only to show other members the fields they should fill out.

Votes ⇒

Enter committee votes as the number of votes in each category listed. *This field is not required because individual reviewers (e.g., MPP) don't vote*.

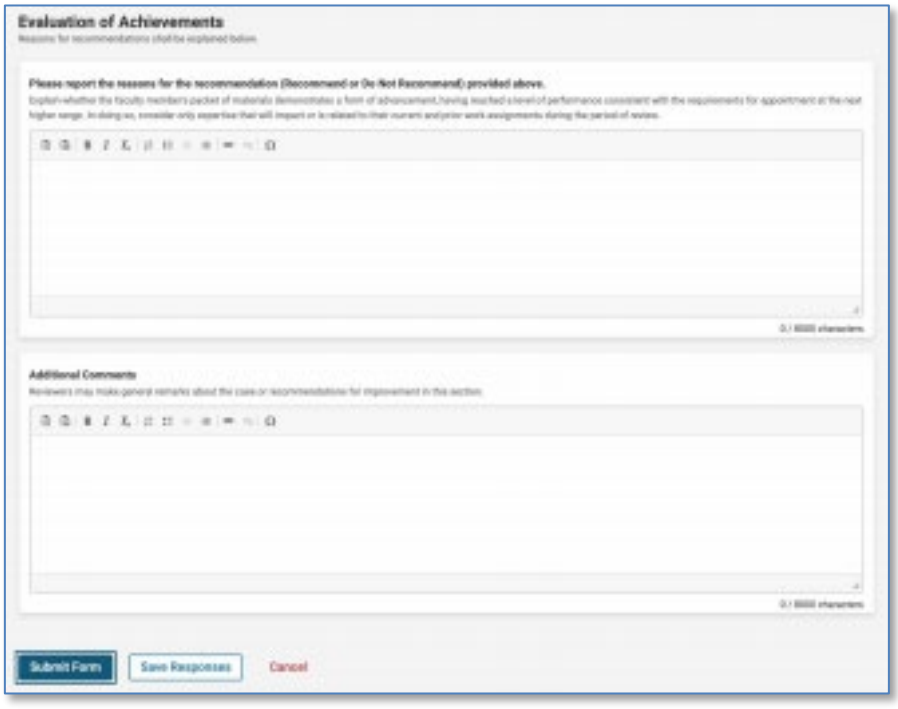


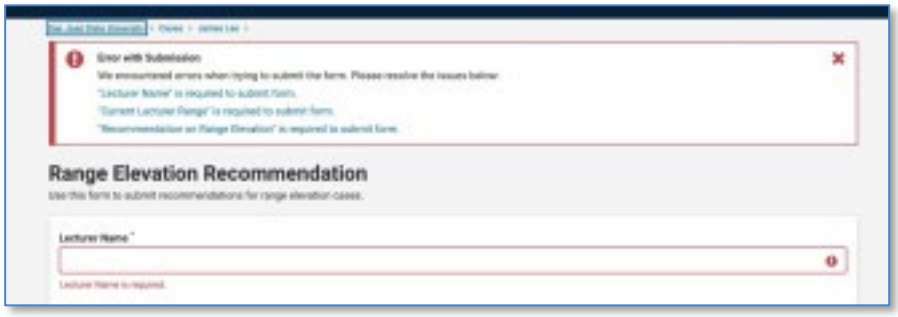
As changes are recommended, the chair may edit and resubmit a form an unlimited number of times.

These fields are not required. This allows a memo to be uploaded instead.

Submit (not "save") the final version prior to moving the case forward. Required fields must be completed.

Submit ⇒



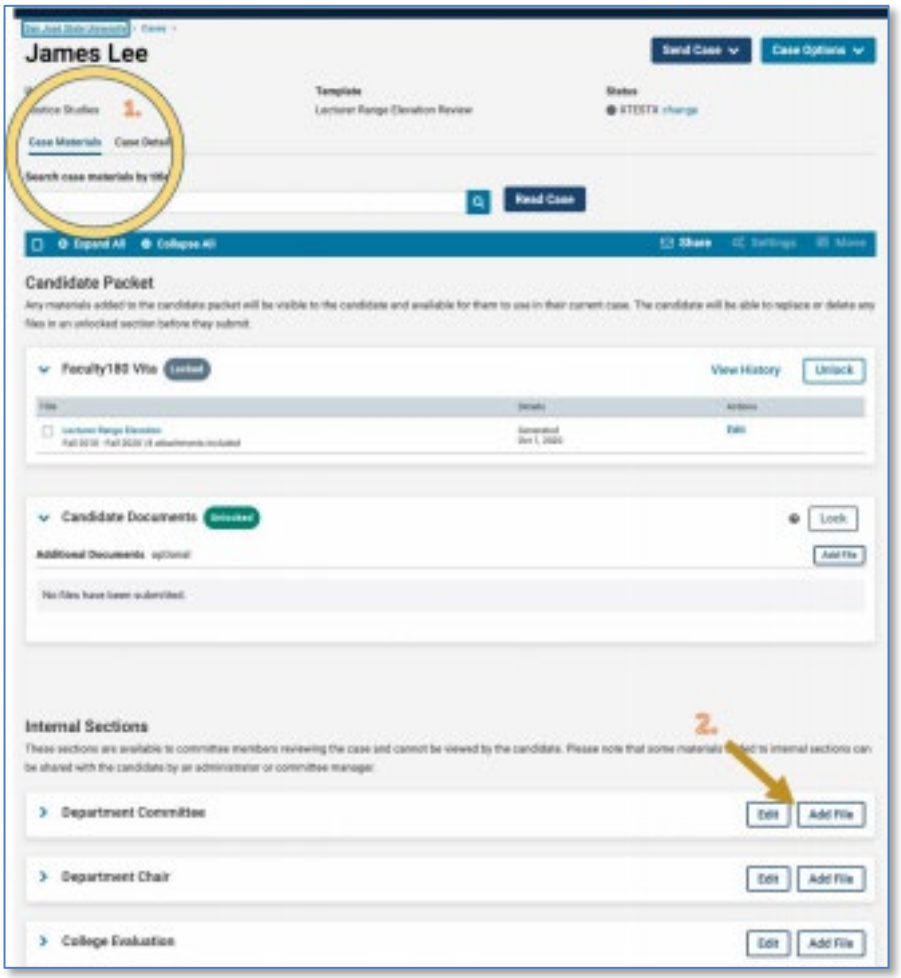
Required Sections (ERROR Message) The recommendation is required for each case. An error message will prevent submitting a form with blank required fields.	
Digital Signature The committee reads the required recommendation form and vote report, and submits their digital signature to express agreement. *<u>Note:</u> Non-participating members should have voted "Absent" or "Abstain" prior to deliberations.*	

Add a Memo

Occasionally, committee chairs or other reviewers prefer to upload a memo rather than direct-input recommendations.

To upload a memo:

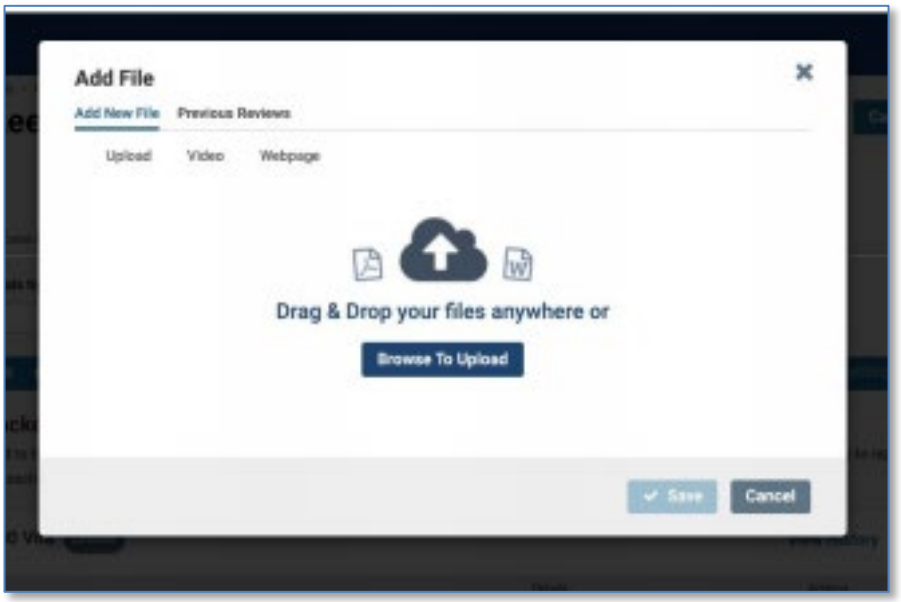
1. Go to the Case Materials page.
2. Scroll to the bottom of the page, and select "Add File" on the appropriate Committee or administrative review line.

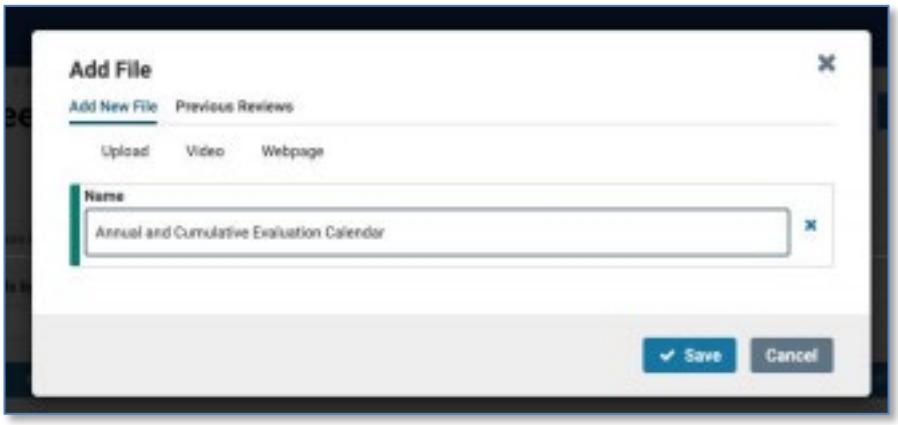
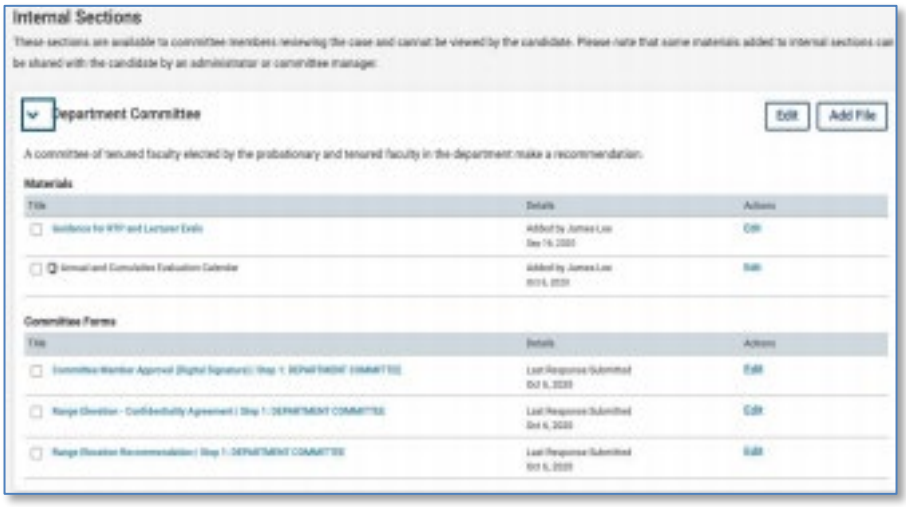
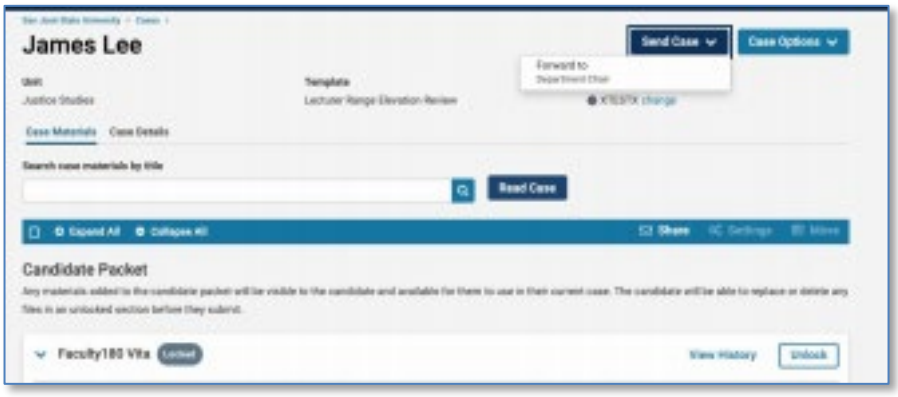


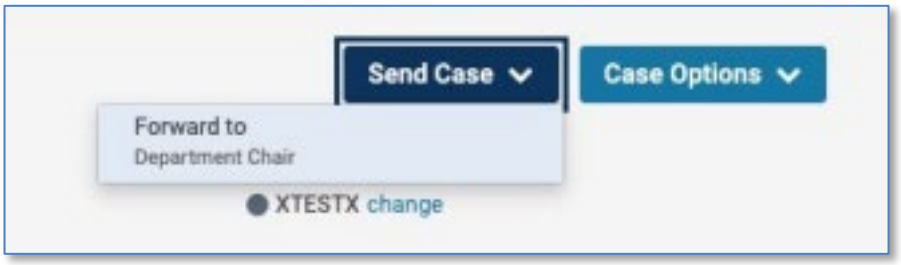
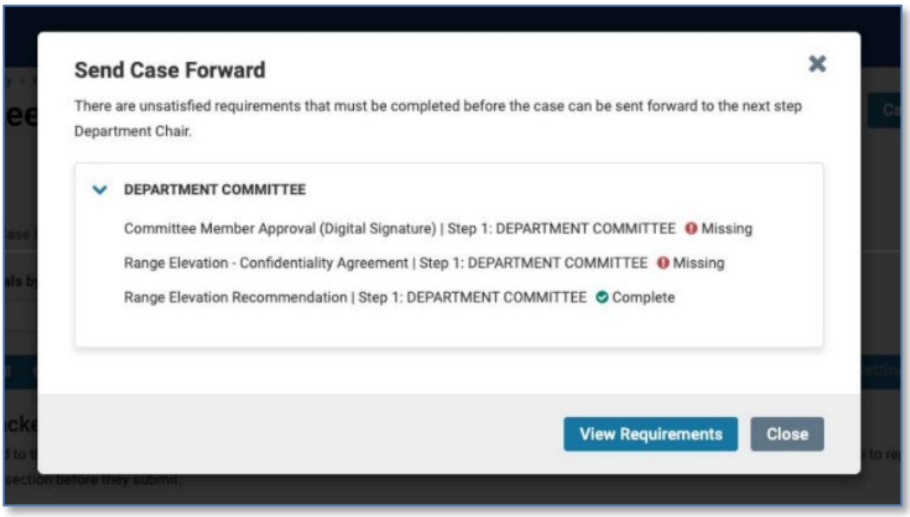
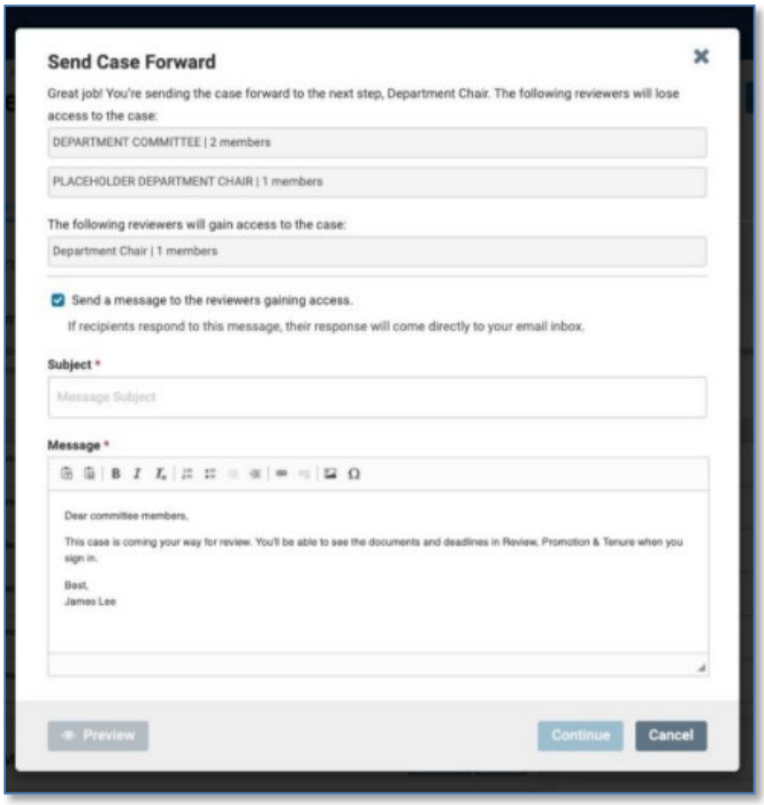
Add a Memo

Follow the sequence of steps:

1. Add File
2. Browse to Upload



Add a Memo After the file uploads, select "Save."	
Add a Memo The file will be listed under the Committee or reviewer header upon return to the "Case Materials" page ⇒	
Send Case Forward - Finalize Evaluation When finished with review, <u>and all forms have been submitted</u>, the Committee Chair or other Reviewers will finalize their recommendations by sending the case to the next level of review. That function is under "Send Case" at the top of the "Case Materials" page.	

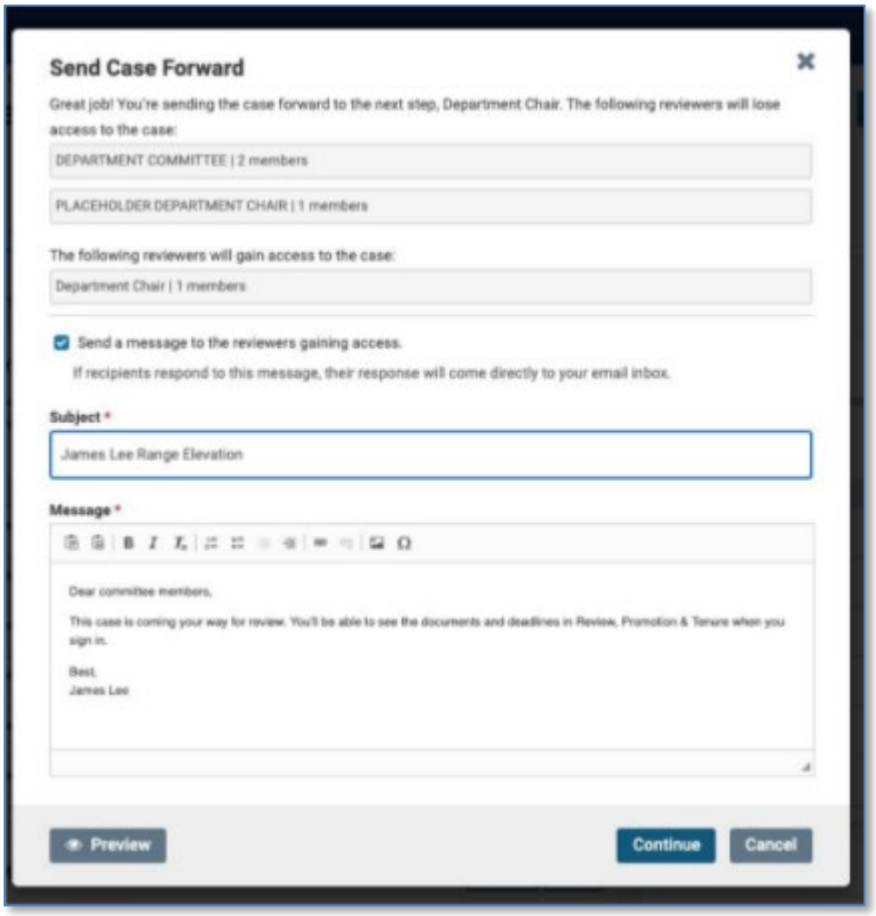
Send Case Forward - Finalize Evaluation Sending the case forward "submits" the evaluations. Under "Send Case," select "Forward to…"	
Send Case Forward - Finalize Evaluation *<u>Important:</u> The case cannot move forward until all required forms are submitted by all committee members.*	
Send Case Forward - Finalize Evaluation Email messaging is used (required in eFaculty) to notify the next level of review. Committee chairs and reviewers must enter a subject for the email to send. A "factory set" message appears in the body. While it may be edited, it also may be sent without edits.	

Send Case Forward - Finalize Evaluation

If there is a unique issue to notify the next level of review about, it may be entered into the email message. Be mindful however, that all recipients will see the message.

After entering the subject, click "Continue." The case will move after the confirmation is made.

You're finished.



Congratulations! You have submitted your recommendations.