

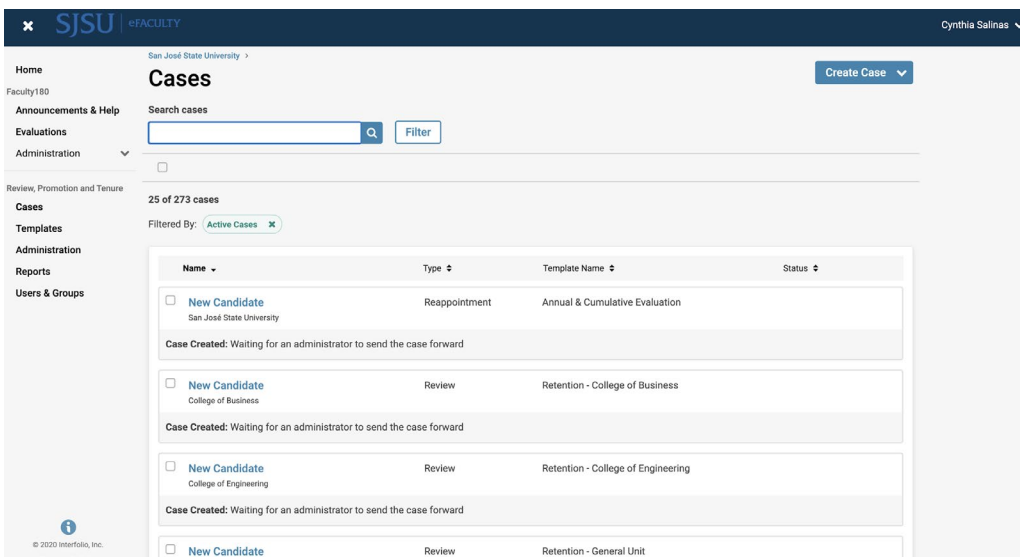
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This help guide is for temporary faculty for the eFaculty system. It explains the setup and management of cases using eFaculty. University Personnel Faculty Affairs (UP-FA) has named the system for faculty evaluations “eFaculty,” its vendor, however, is Interfolio. For more information on using eFaculty, please visit the [eFaculty](#) webpage on the SJSU University Personnel website.

## WHAT IS eFACULTY?

eFaculty allows faculty to organize a digital portfolio that can be passed through a structured review process. We use eFaculty to help faculty efficiently upload and gather essential materials without collecting them manually. eFaculty helps reviewers collaborate on faculty materials online while adhering to institutional guidelines. 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 along the way

- **Storing digital copies**

**of reviews** for the faculty and other individuals to view it.

- **Facilitating communication** between Temporary Faculty, reviewers, and department and college 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. FAR is the area in eFaculty where faculty upload their review materials. The review module (RPT) pulls information--by date range and review type--out of FAR. This area is available 24/7 for faculty to input their activities.
- **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 Annual and Cumulative evaluation of Temporary Faculty will be conducted within the RPT module).
- **Annual and Cumulative Evaluations:** Annual Evaluations are required for all temporary faculty with yearly contracts. Cumulative Evaluations are required for initial and renewal, three-year appointments, and are conducted during the Spring Semester. Annual and Cumulative Evaluations are processed within eFaculty. For more information, visit the [Periodic Evaluations-Lecturers Instructions](#) and the [Periodic Evaluations-Lecturers Calendar](#).
- **Candidate:** eFaculty refers to the individual being reviewed as a Candidate. “Candidate” and “Temporary 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. Typically, this is drawn from Faculty180
- **Dossier:** Pronounced “däsē.ā.” Area within eFaculty for all faculty to store and manage career information (e.g., fellowships, student evaluations, publications, evaluations) in one place. The Dossier is a collection of materials from which a packet may be derived and submitted for review. Packets submitted in RTP are commonly called “the dossier.”
- **Committees:** Groups of users (or individuals) that can review cases at a given step of the review process. There are two types of committees: 1.) *Standing Committees,*

which are set up outside of the cases so they can populate to multiple cases and 2.) *Ad Hoc Committees*, which can be set at multiple steps within a single case. **Note:** *Committees for Annual and Cumulative evaluations 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 will likely serve as manager for the committee.
- **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., annual evaluation) 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 temporary faculty for review. The eFaculty Administrator can lock or unlock a section for editing as needed. There are three types of sections within Interfolio:
  - 1) Faculty Documents - any documentation that the temporary faculty adds for review
  - 2) Committee Documents - any documentation that a eFaculty administrator adds for only committee members to view
  - 3) Forms - created within Interfolio to collect specific information from the temporary faculty or committee members
- **Case Steps:** After the temporary 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 TEMPORARY FACULTY ROLE & TASKS

Temporary 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 Darren Wilson, Institutional Research Analyst, at [darren.wilson@sjsu.edu](mailto:darren.wilson@sjsu.edu).

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

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

## OVERVIEW OF ANNUAL & CUMULATIVE EVALUATIONS

The faculty collective bargaining agreement (Article 15) establishes review of lecturers as a condition of reappointment. Annual evaluations are conducted at least once per appointment period, and cumulative evaluations prior to 3 year appointments, during the initial 6 year eligibility period or recurring 3 year eligibility period.

Full-time appointed faculty must always undergo department committee review. All faculty in cumulative evaluations must be reviewed by a department committee. Only part-time, annual evaluations may skip department committee review.

### Annual Evaluation

Departments may evaluate all lecturers annually, but annual evaluations are required of all full-time and part-time appointed lecturers at least once per appointment period.

Evaluation is required:

1. If the lecturer is appointed for two or more semesters, but not holding a three (3) year appointment.
2. At least once during each 3 year appointment, preferably in year 2.

### Cumulative Evaluation

Cumulative Evaluations are conducted to qualify lecturer and temporary librarian faculty for Initial or Renewal of Three (3) Year Appointments (commonly called "entitlement" at SJSU). Initial appointments follow 6 consecutive academic years of appointments and are subject to "satisfactory" rating on cumulative evaluation, while renewals follow the 3rd

year of a Three-Year Appointment and are subject to "satisfactory" rating on cumulative evaluation.

### **Materials to Submit in eFaculty**

The following pertaining to the period of review--prior calendar year if annual, qualifying period if cumulative--must be submitted:

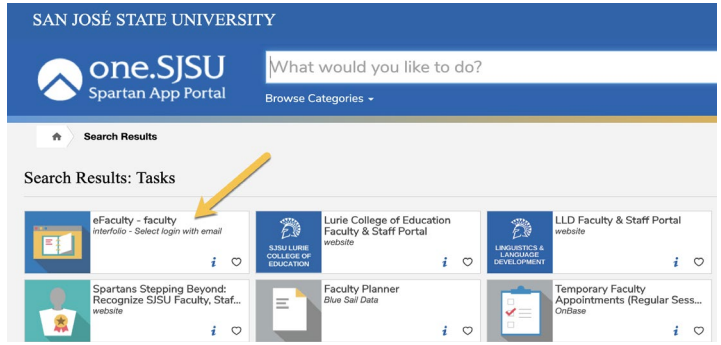
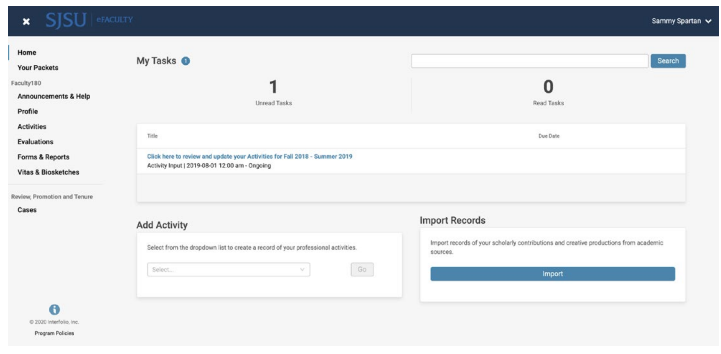
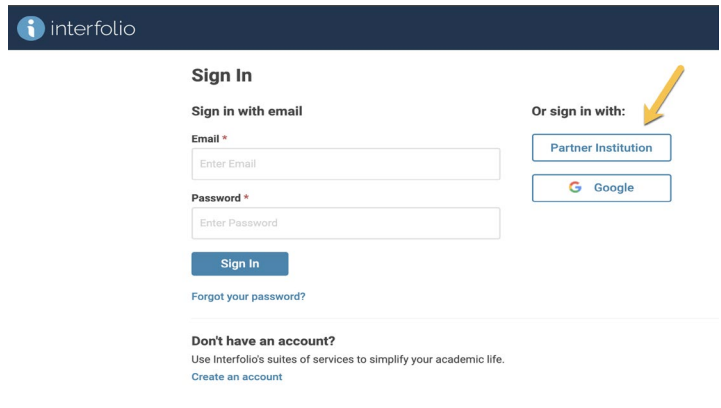
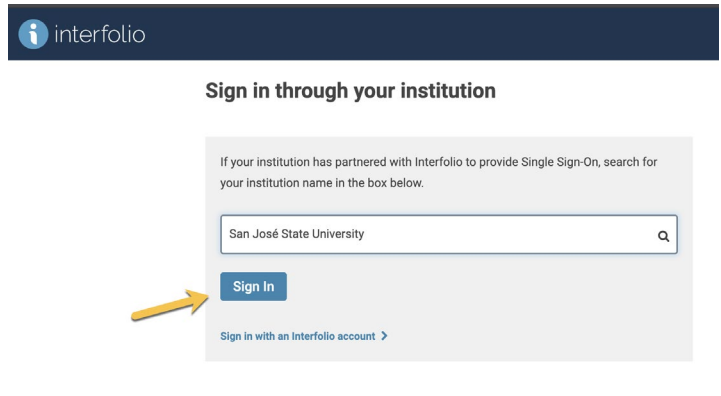
1. ASA-L(s); upload to Activities tab, "Review: Annual/Cumulative Lecturer Evaluations" or store cumulatively in "Prior Evaluations and Reviews" (no need for double placement).
2. All required SOTE/SOLATEs; automatically uploaded to "Classes Taught at SJSU" or the "Additional Student Evaluations" tabs. Faculty must upload or account for missing evaluations.
3. All Direct Observations of Teaching conducted by faculty peers; upload to "Direct Observations of Teaching." Faculty must upload or account for missing peer observations.
4. (Cumulative only) All annual evaluations (department and dean comments) conducted during the period of review; upload to "Prior Evaluations and Reviews."

For more comprehensive review, faculty may submit additional documentation from the period of review, such as syllabi, course assignments, evaluations of non-teaching duties, and official documentation of professional qualifications. Faculty with non-teaching assignments are responsible for providing documentation in those areas. Find the appropriate "Activities" tab to direct-enter the information and/or upload supporting evidence.

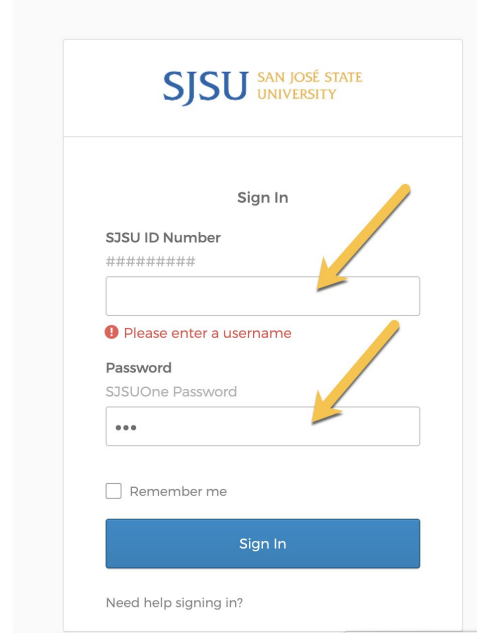
Cumulative Evaluation may occur during the same cycle as annual evaluation. At those times cumulative evaluation materials shall appear simultaneously with those from annual evaluation, and reviewers will perform each evaluation as appropriate.

The department or appropriate administrator may enter evidence for review as well. Copies of materials entered this way **must** be given to the faculty member before the first level of review begins.

LOGGING IN TO eFACULTY

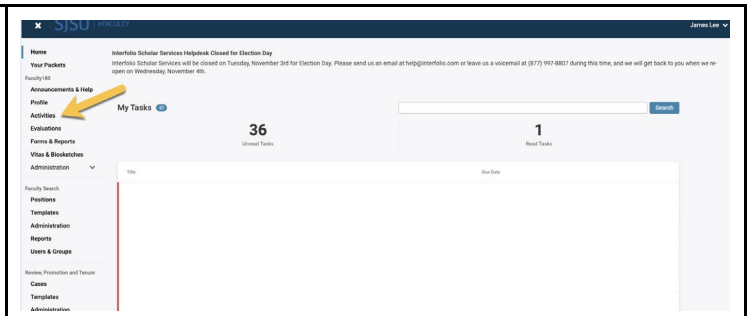
<p>1. Log in through <a href="https://one.sjsu.edu/">https://one.sjsu.edu/</a> and search for “eFaculty”</p>	 <p>The screenshot shows the 'one.SJSU Spartan App Portal' search results for 'Tasks'. A yellow arrow points to the 'eFaculty - faculty interfolio - Select login with email' result, which is the first item in the list.</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 'SJSU eFACULTY' homepage. The 'My Tasks' section displays '1 Unread Tasks' and '0 Read Tasks'. Below this, there are sections for 'Add Activity' and 'Import Records'.</p>
<p>3. Logging in through <a href="https://one.sjsu.edu">one.sjsu.edu</a> is preferred, but you can also log in by visiting <a href="https://home.interfolio.com/">https://home.interfolio.com/</a> and selecting “Partner Institution.” For security purposes, please <b>do not</b> 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 fields for 'Email' and 'Password'. To the right, there are options to 'Or sign in with: Partner Institution' and 'Google'. A yellow arrow points to the 'Partner Institution' button.</p>
<p>4. Enter “San José State University” and select “Sign In.”</p>	 <p>The screenshot shows the 'interfolio Sign in through your institution' page. It has a search box for the institution name, with 'San José State University' entered. Below the search box is a 'Sign In' button, which is highlighted by a yellow arrow.</p>

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

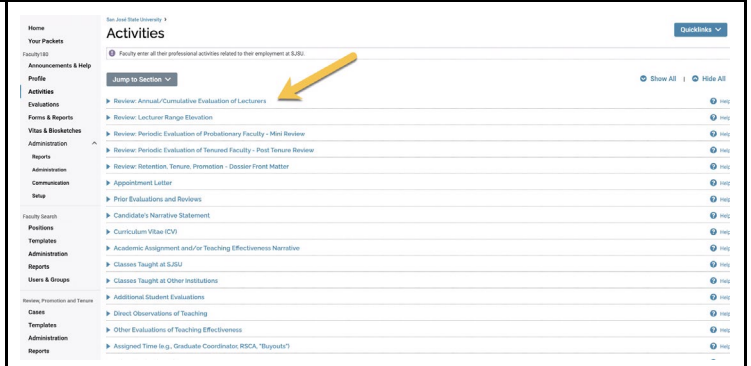


## UPLOADING MATERIALS

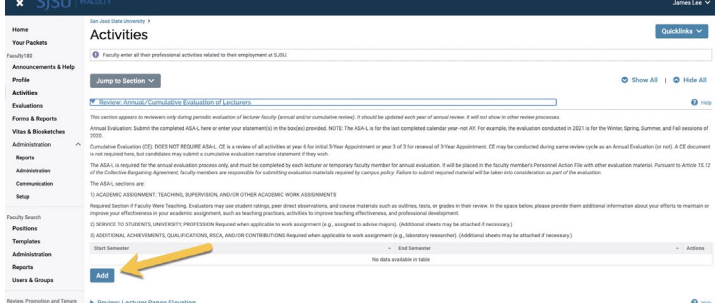
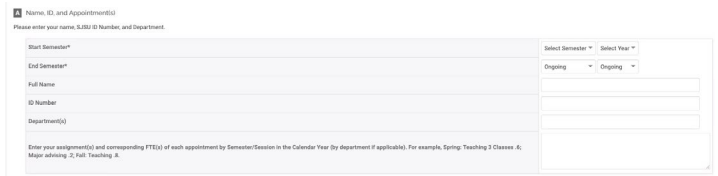

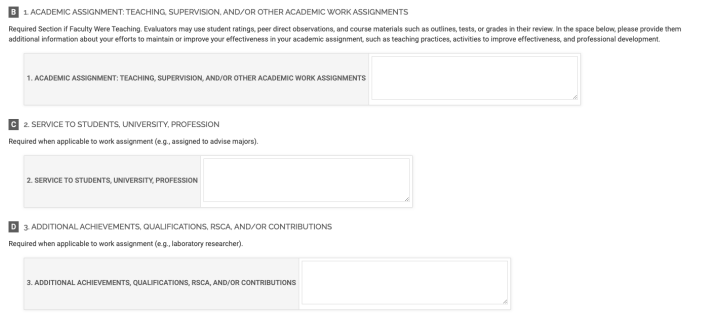

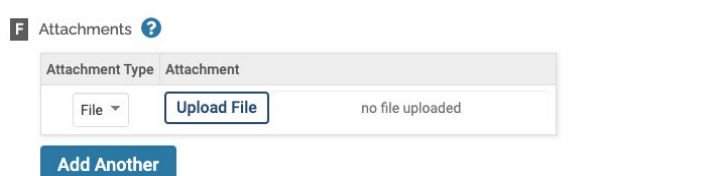
1. Select “Activities” on the left navigation bar.



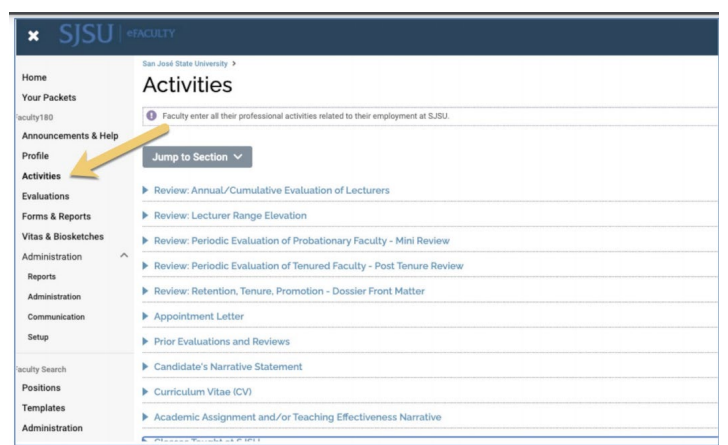
2. The Activities section will display. Select “Review: Annual/Cumulative Evaluation of Lecturers”.



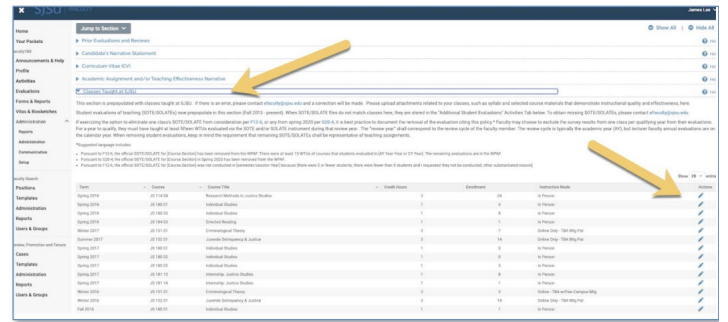


<p>3. Then select “Add”</p>	
<p>4. In Section “A”, enter your personal information, Department, and assignments and corresponding FTE(s).</p>	
<p>5. This is an example of Section A.</p>	
<p>6. In Sections “B - D”, enter your descriptions of achievements.</p>	
<p>7. In Section “E”, select “yes” to affirm the statement of accuracy.</p>	
<p>8. In Section “F”, upload any other documents you may want to include in this section. Then select “Save”.</p>	
<p>9. To use the upload route (instead of direct entry) for the ASA-L, download the Annual Summary of Achievements - Lecturers found under “<a href="#">My Preparation and Review</a>”. <b>Note:</b> eFaculty is most compatible with Word, and may have difficulty with PDF files.</p>	

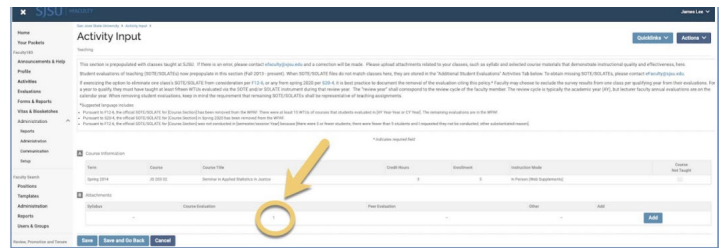
1. Select “Activities” under Faculty 180.



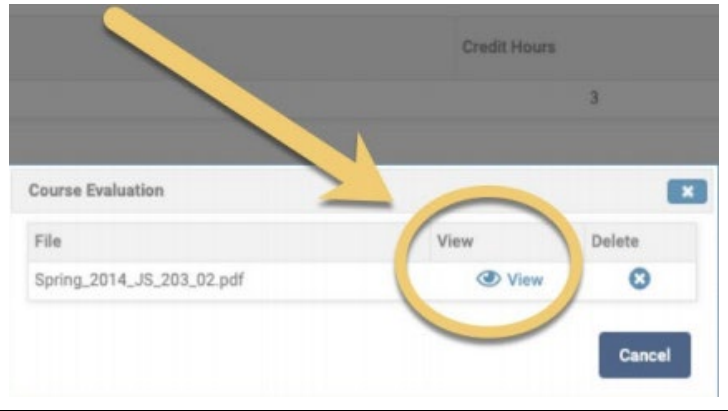
2. Select “Classes Taught at SJSU” Under the “classes taught” tab, there will be a list of the classes you taught. Select the pencil icon on the right side of the course row for those courses that had student evaluations.  
**Note:** Errors in classes taught may be identified for reviewers in semester notes or corrected by sending a request to [efaculty@sjsu.edu](mailto:efaculty@sjsu.edu).

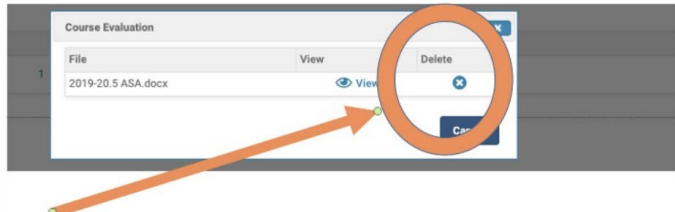

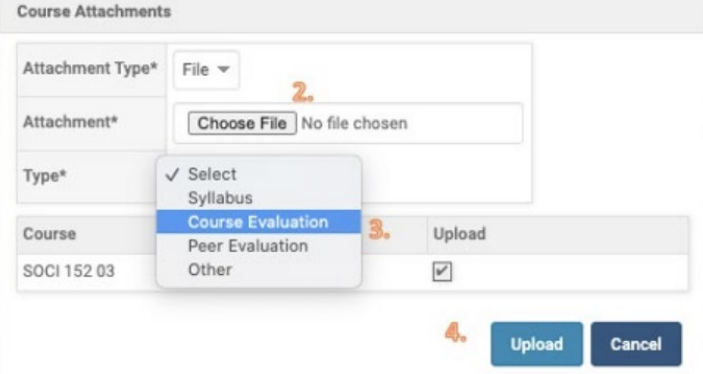
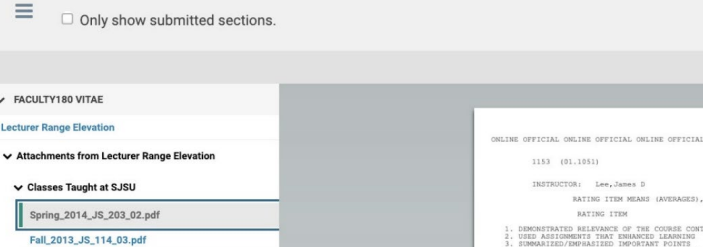


3. The SOTE or SOLATE file is underneath the hyperlinked number under header “Course Evaluation.” The number is slightly misaligned with the header. A dash indicates there is no file in the section.



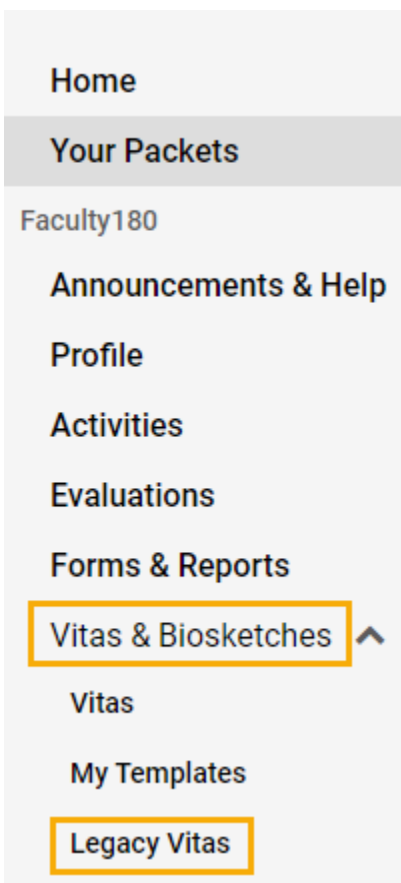
4. Select the blue eyeball to open or download your SOTE/SOLATE file.



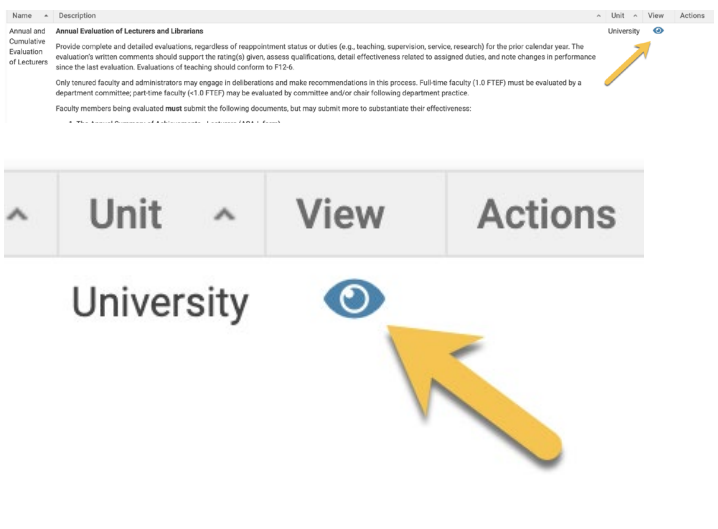
<p>5. Select “X circle” to delete a SOTE or SOLATE file.</p>	
<p>6. To add a SOTE/SOLATE (or memo explaining removal of a SOTE/SOLATE) select “Add” (#1)</p>	
<p>7. Choose the file (#2), Select “Course Evaluation” (#3), and select “Upload” (#4)</p>	
<p>8. Note: Reviewers will not have so much trouble locating your SOTE/SOLATES. Reviewers will see file names in the left bar, and the file opens in the PDF reader.</p>	

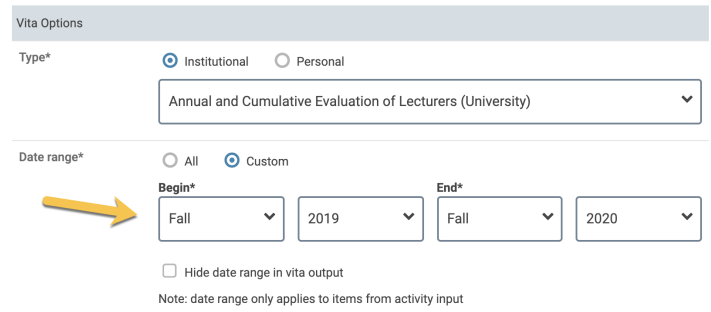

**PREVIEW MATERIALS IN FACULTY 180**

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".

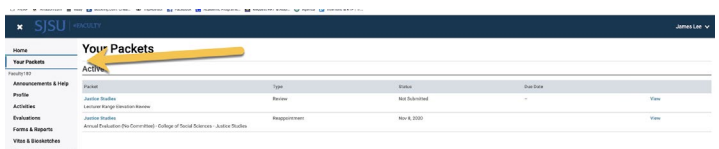
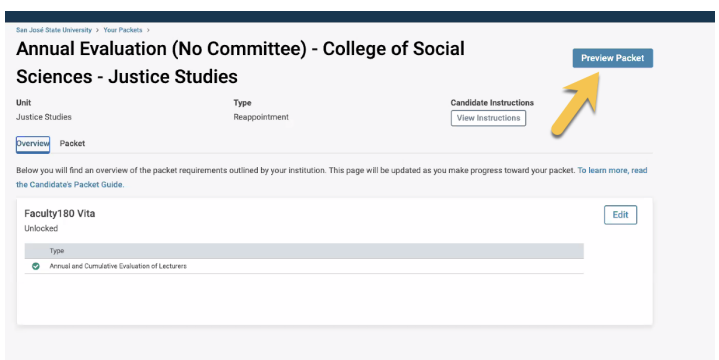


2. Select "Vita Admin" and select the blue eyeball in the "Annual and Cumulative Evaluation of Lecturers" section



<p>3. Select the start date, the prior spring semester for annual evaluation or the first semester of period of review for cumulative evaluation; and end date corresponding to your period of review, typically the latest fall for annual evaluation or the spring semester of review for cumulative evaluation.</p>	
<p>4. Select Refresh Vita</p>	

**PREVIEW AFTER PACKET IS GENERATED**

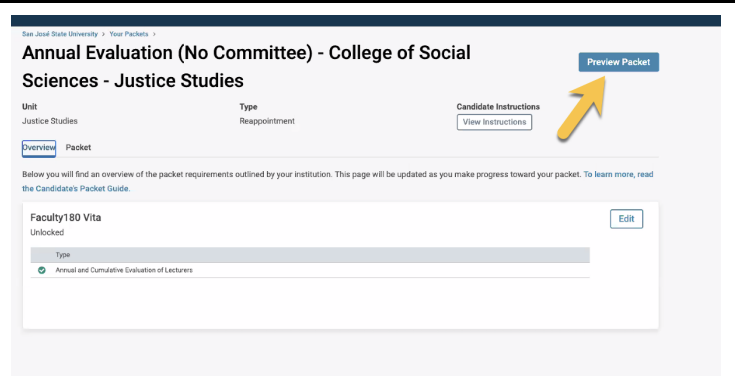
<p>1. Note: After a eFaculty administrator has created a case for review (i.e., linked RPT to FAR and generated a packet) you will have access to the reviewer’s interface until the packet is locked (i.e., submission deadline).</p>	
<p>2. Select “Your Packets” in the upper left sidebar.</p>	
<p>3. Select “Preview Packet.” Your dossier, complete with any attachments pulled in from Faculty180, will be viewable from reviewers’ perspective in the RPT (PDF) reader.</p>	

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.”

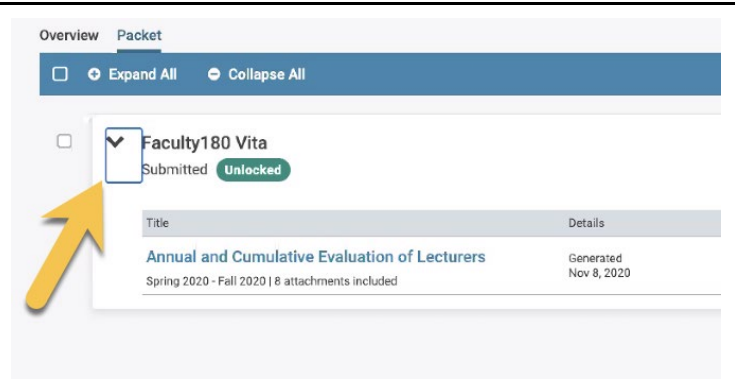
5. Then confirm and select “Yes”

## REGENERATE AND SUBMIT THE DOSSIER

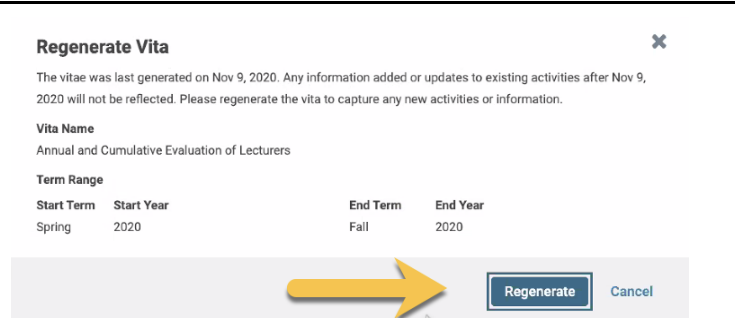
1. When you are ready to submit the dossier, meaning letting your department know you are finished uploading material for review, select “Your Packets” to view the packet.



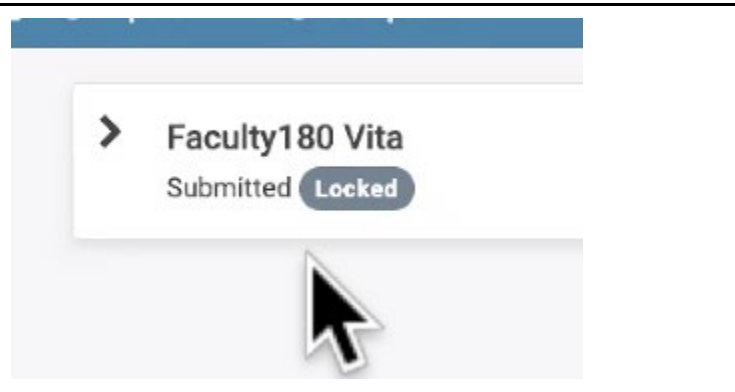
2. Select “Expand All” or the “>” icon left of “Faculty180 Vita”



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-FA at [efaculty@sjsu.edu](mailto: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.