

# **Annual Evaluations**

### Archivum's Faculty Information System (FIS)

This tutorial will take you through the steps of the Evaluation Process based on your role.

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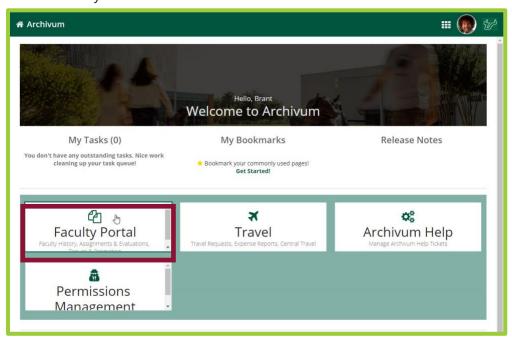


### Logging In

Everyone logs into the FIS through Archivum, which is accessed at the my.usf.edu portal.



This will open the Homesites Dashboard. Everyone's dashboard has a similar look, but the items within differ depending on the roles you have within USF. Select *Faculty Portal* to get into the Faculty Information System.



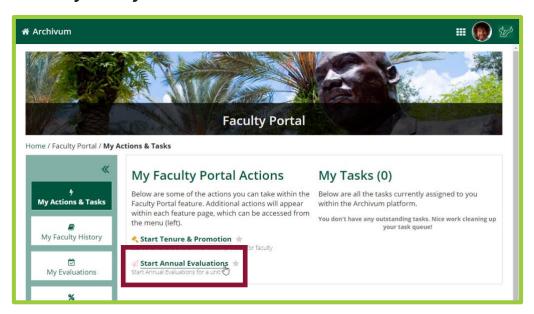


#### **Unit Administrator**

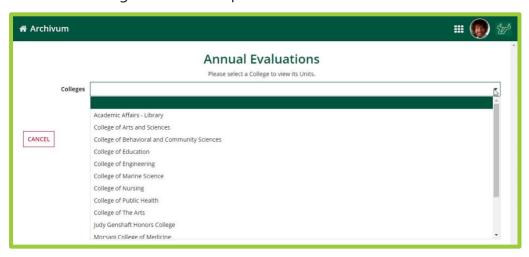
#### **Start Annual Evaluations**

As the Unit Administrator, which could be a college or department liaison or a department chair, you are tasked with starting annual evaluations.

#### Under My Faculty Portal Actions, select Start Annual Evaluations

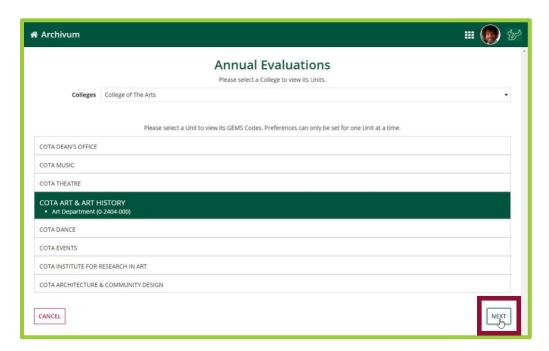


Select the college from the dropdown list.

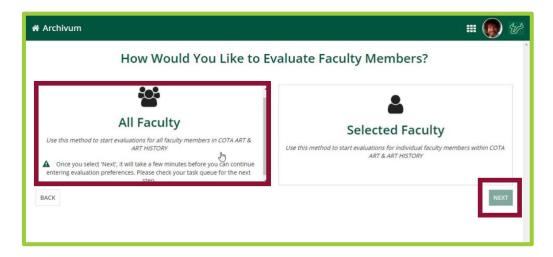




Select a Unit to view its GEMS Codes. Preferences can only be set for one Unit at a time. Select *Next*.



On this screen, you have two options for selecting faculty. Select **All Faculty** to include all faculty from that Unit OR Click **Selected Faculty** to choose individual faculty you would like to include.

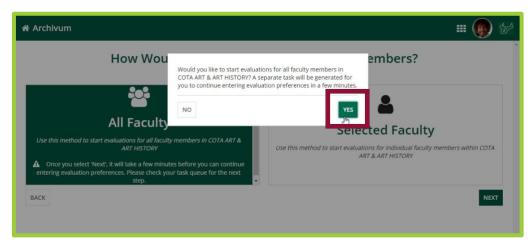




#### Here we will select **All Faculty** followed by **Next**

The message informs you of your choice and that a Task will be generated for you that you must navigate to in order to continue with the evaluations process.

Select Yes to continue.



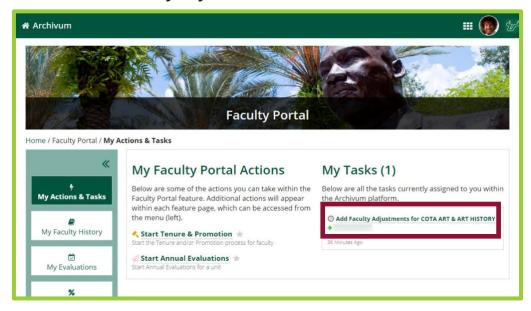
Please note that it may take up to 15 minutes for the task to be generated. A Task Email will also be automatically sent to you.

### **Accessing the Task**

There are two options to view the task. You can either click the *View Task* button in the email notification or navigate to the Faculty Portal to view your Tasks under My Tasks.



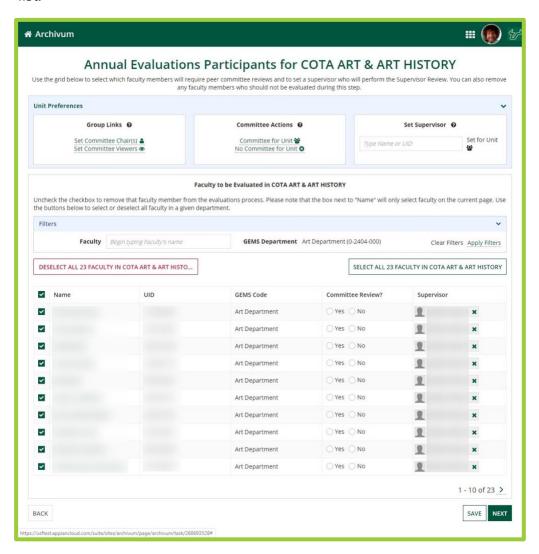
#### Select the *Add Faculty Adjustments* link for the unit.





# **Setting Unit Preferences and Faculty Adjustments**

On this screen, you are tasked with Setting Unit Preferences and refining the faculty selection list.

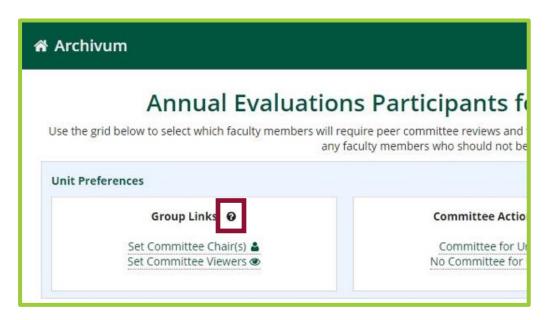


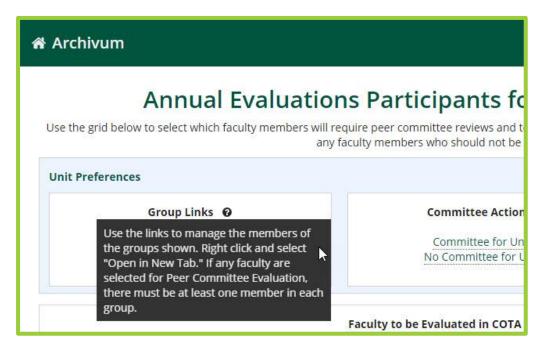
### **Committee Settings**

Let's begin by Setting the Committee Chairs.



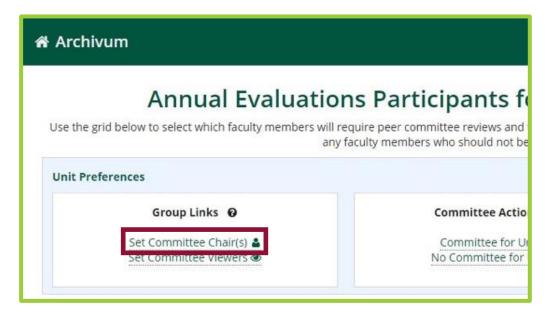
Please notice the Question Mark next to Group Links. These are helpful hints to better understand what is required of the section. Simply hover over the Question Mark to view the hint.



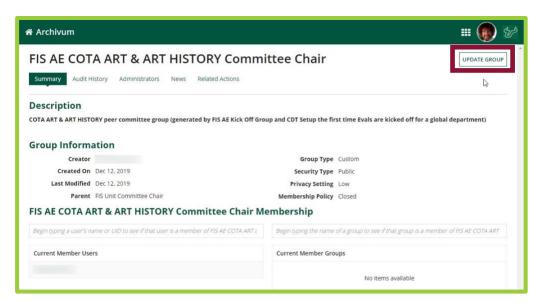




Now select Set Committee Chairs. Here you can view existing group memberships.

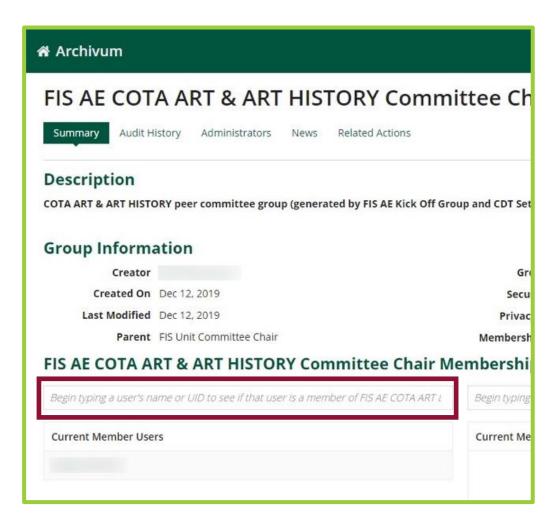


Select **Update Group** to make modifications.



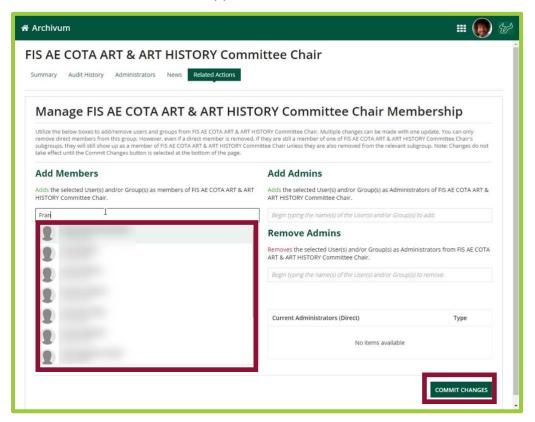


Enter a name or U-Number to search for individuals. Remember, names may be case sensitive.





Select the desired individual(s) from the list.



Select Commit Changes.



#### Repeat this process for **Set Committee Viewers**



Now let's Look at **Committee Actions**.



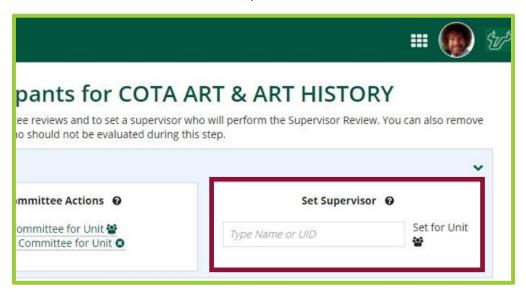
This is a convenience feature which allows you to select all **Yes** or all **No** for **Committee Review**.

Your choices can still be modified after this step.

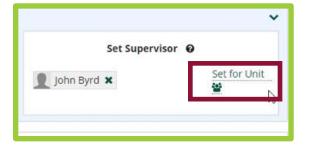


#### Supervisor Settings

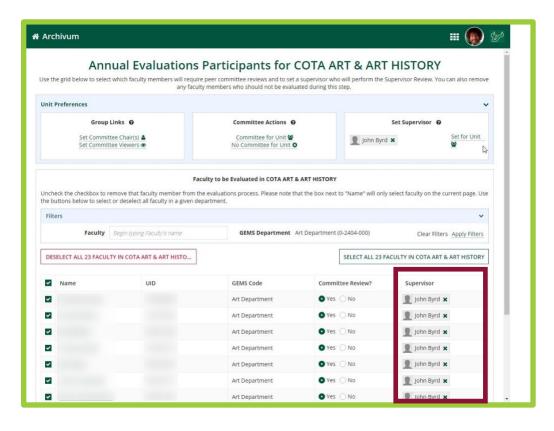
Now let's look at **Set Supervisor**. Enter a name or U-Number to search for an individual. Select the desired individual to be the supervisor.



Select **Set for Unit** to apply this supervisor to all the faculty members. Individual faculty member supervisors can still be modified.



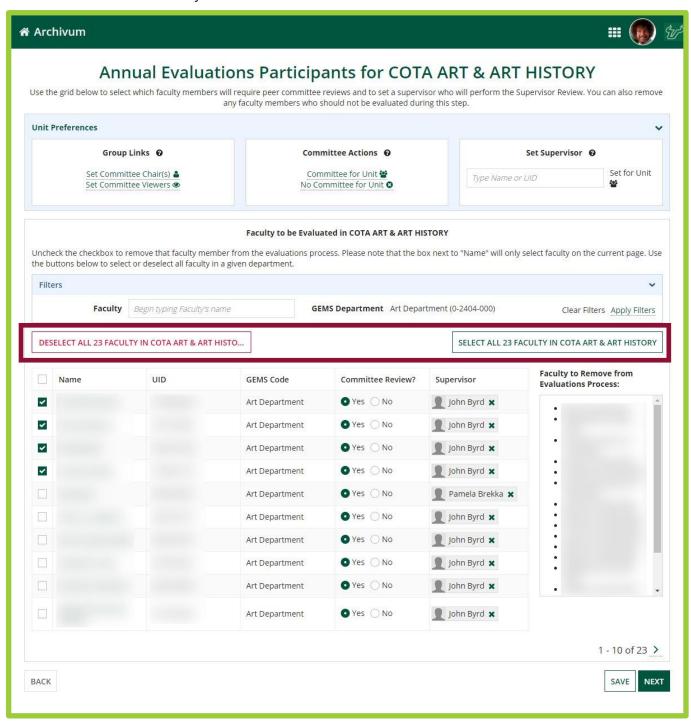






### **Selecting Faculty for Evaluation**

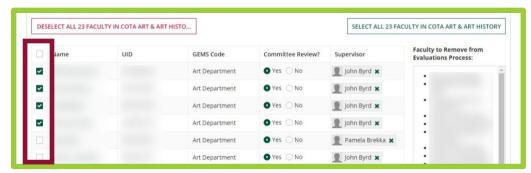
Now let's look at the faculty listed below.



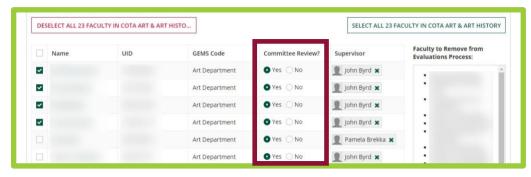
All the faculty members can be selected by clicking the **Select All Faculty** button **or** All Faculty can be deselected by clicking the **Deselect All Faculty** button.



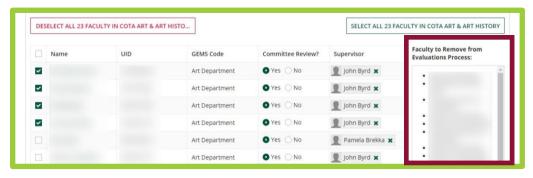
Individual faculty members can be added or removed by selecting the appropriate checkbox.



Committee Review selections can be modified by selecting the appropriate choice.

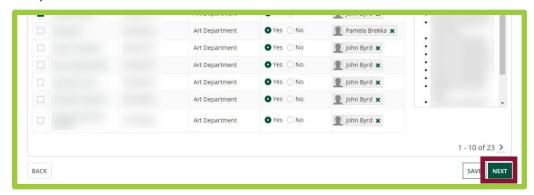


Faculty to remove from the process are displayed here.

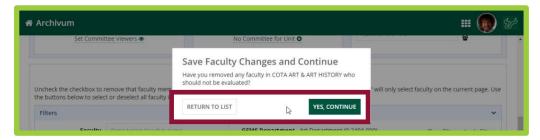




Once you are satisfied with the selected faculty and supporting criteria, select *Next* to advance the process.



Confirm if you have removed any faculty who should not be evaluated at this time. Select **Yes, Continue** or **Return to List** if you would like to make modifications.

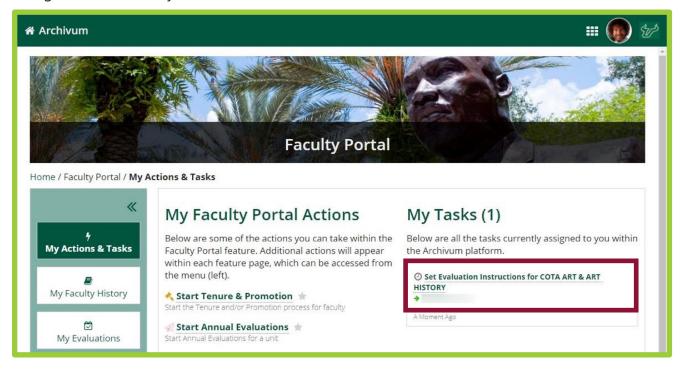




#### **Set Self-Narrative Instructions for Evaluations**

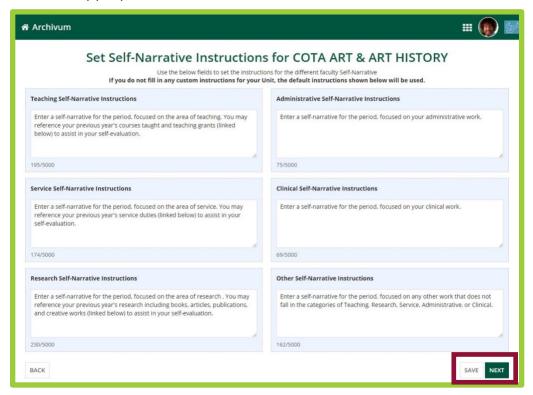
The next step is to **Set Self-Narrative Instructions**. You will receive a task email and task notification for this step.

Navigate to the Faculty Portal. Select the **Set Evaluation Instructions** task.





Enter the appropriate instructions for each section.



Select **Save** to save your work or **Next** if you are satisfied with all your entries and you are ready to advance the process.

# **Setting Evaluation Period, Timeline, and Unit Guidelines**

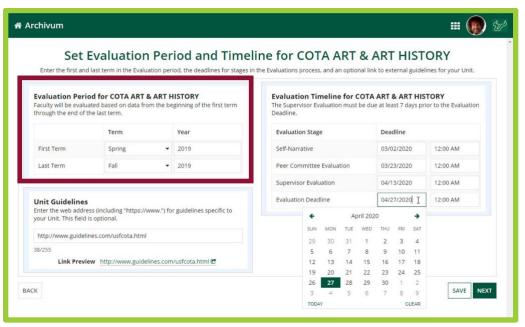
The next step is to **Set Evaluation Period, Timeline**, and **Unit Guidelines**. You will receive a task email and task notification for this step.



Navigate to the Faculty Portal. Select the **Set Evaluation Terms and Deadlines** task.

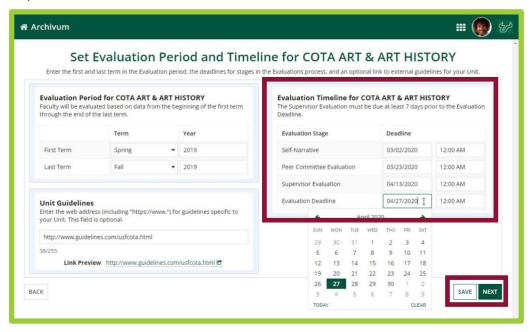


Set the **Evaluation Period** by selecting the **Term** and entering the **Year**.





Set the *Evaluation Timelines* by entering the Self-Narrative, Peer Committee Evaluation, Supervisor, and Evaluation deadline dates.



Select **Save** to save your work or **Next** if you are satisfied with all your entries and you are ready to advance the process.

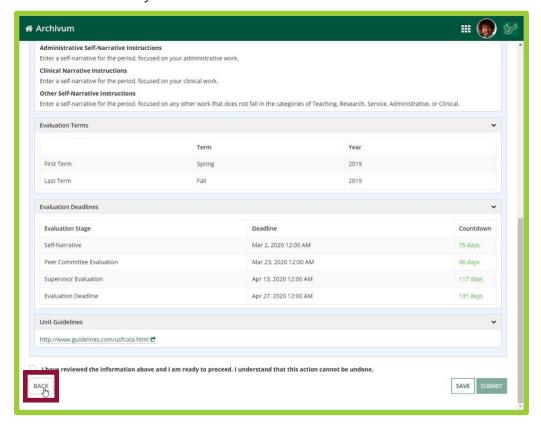
#### **Review Preferences**

The next step is to *Review your Evaluation Preferences*. You will receive a task email and task notification for this step. Navigate to the Faculty Portal. Select the *View Evaluation Preferences* task.





This screen allows you to review all the Evaluation Preferences.



If any sections of the preferences need modification, select **Back** until you reach the page requiring attention.

Make the modification and select *Next* to advance the process.

A new task email and task notification will be generated.



When you are satisfied with the current Evaluation Preferences, *Check* the box acknowledging you have reviewed the information and are ready to proceed.



Please note that this process cannot be undone. Select **SUBMIT** to advance the process.

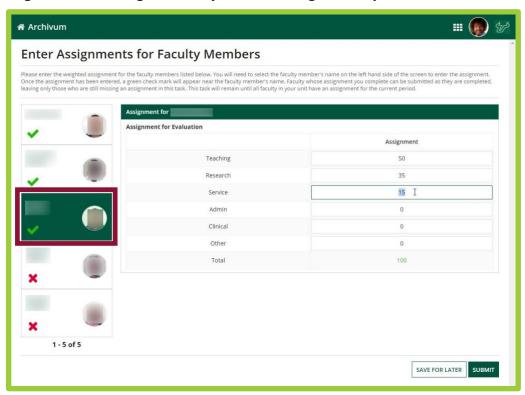
# **Enter Assignments for Faculty**

The next step in the evaluation process is to enter the assignments for faculty members. You will receive a task email and task notification for this step. Navigate to the Faculty Portal. Select the *Enter Missing Assignment* task(s).

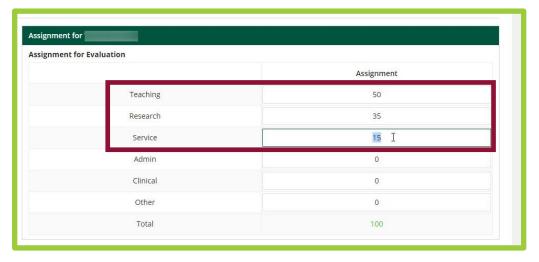




Begin to enter assignments by first selecting a faculty member.

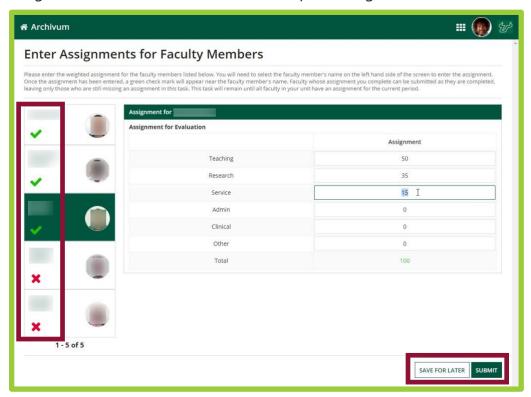


Next, enter the assignment for the appropriate category. Assignments must total and not exceed 100.





Repeat this process for each faculty member. A green checkmark will indicate completed assignments. A Red X will indicate incomplete assignments.



Either **Save For Later** to save the existing assignments and have the ability to return at a later time to complete the remaining assignments, or select **Submit** now to initiate the Faculty Affirm Assignment process for the faculty members with completed assignments.

Faculty members with uncompleted assignments will not receive a task or be notified to Affirm Assignment. These faculty member's assignments can be completed at a later time.

At this point in the Evaluations Process, the faculty members with submitted assignments will receive an email task and task notification to Affirm their Assignment.

If the faculty member agrees with their assignment, they will simply affirm the assignment to move to the next step in the process.



If the faculty member disagrees with the assignment, they can send back their assignment with a required comment to describe the reason.

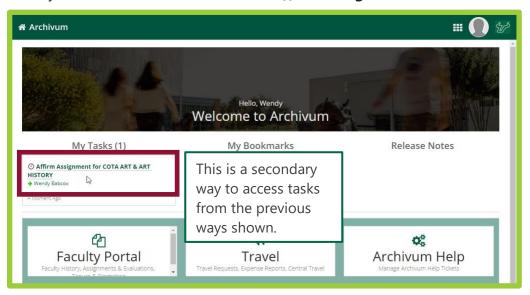
### **Faculty**

### **Populate Faculty History**

As a faculty member, you have been identified in the Faculty Information System to use the online Annual Evaluations. The first step in Annual Evaluations is to populate your Faculty History. Before continuing this module, please review the Faculty History module to learn about the system and how to work with your Faculty History.

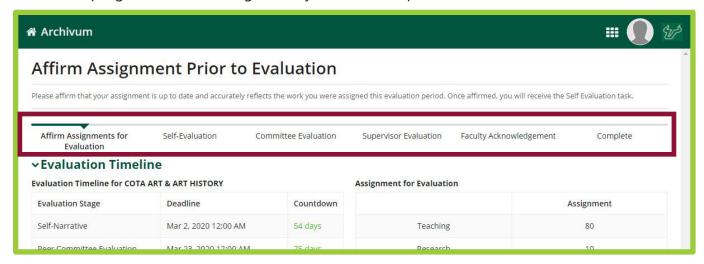
# **Affirm Assignment**

Faculty members receive a task email and task notification in the faculty portal. Navigate to the Faculty Portal in Archivum. Select the *Affirm Assignment* task.

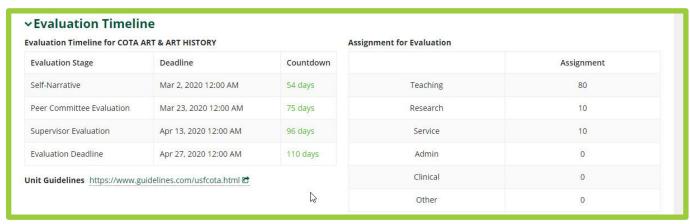




Notice the progress bar indicating where you are in the process.



Review the *Evaluation Timeline* and *Assignment for Evaluation* categories and percentages.



If you feel the category and percentages require adjustment, select **Send Back**.

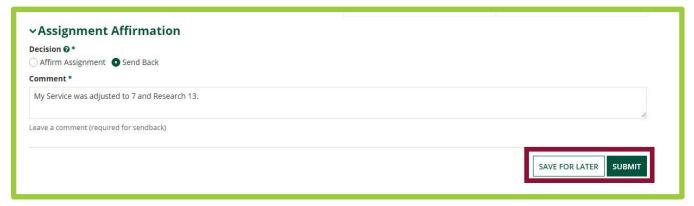




#### Add an optional comment.



Either select **Save for Later** or select **Submit** to send the Assignment back to your Unit Representative for adjustment.



The process will repeat until an assignment is agreed upon.

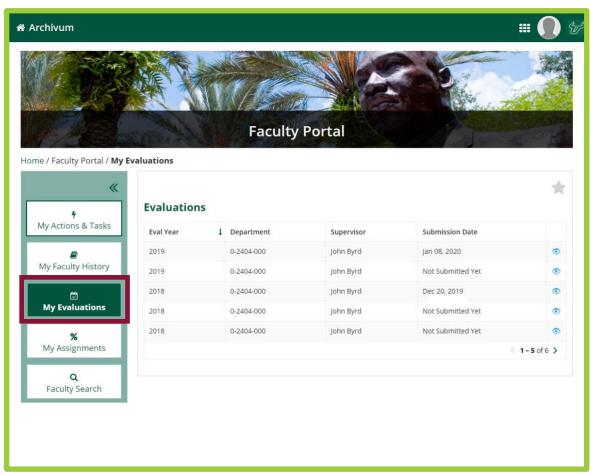
If you are satisfied with the assignment, Select **Affirm Assignment**. Add an optional comment. Select **Submit.** 



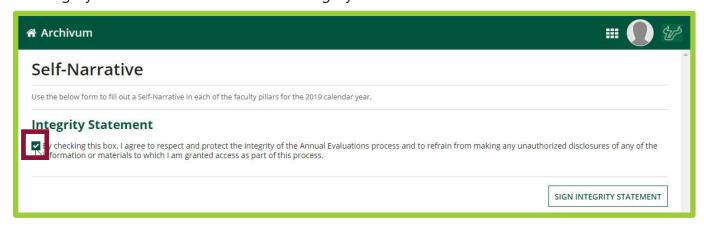


#### **Self-Evaluation**

To view your evaluation, navigate to the Faculty Portal. Select *My Evaluations*.



Select your evaluation. When working in your evaluation for the first time, you must agree to an Integrity Statement. Please read the Integrity Statement and check the box.

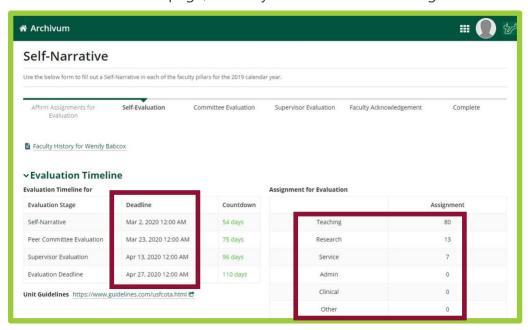




#### Select Sign Integrity Statement

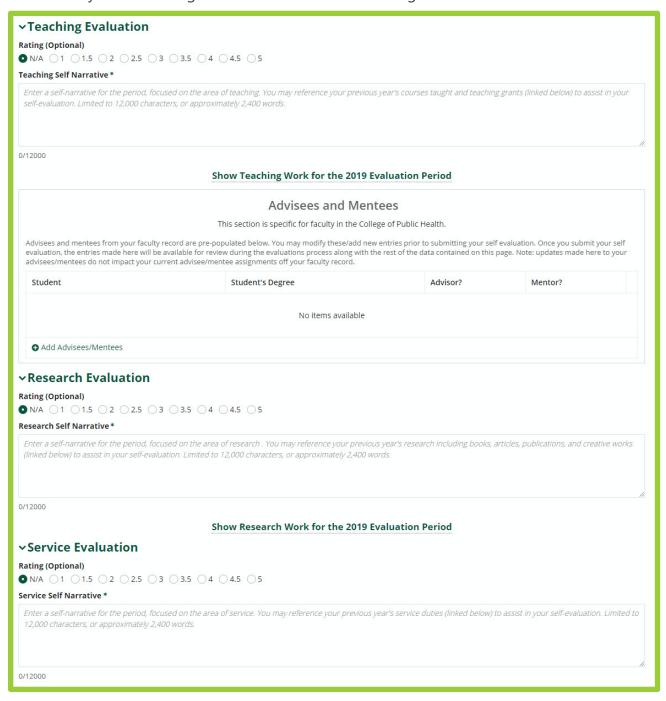


On the self-evaluation page, review your due dates and assignments.





Then enter your self-ratings and narratives for these categories.

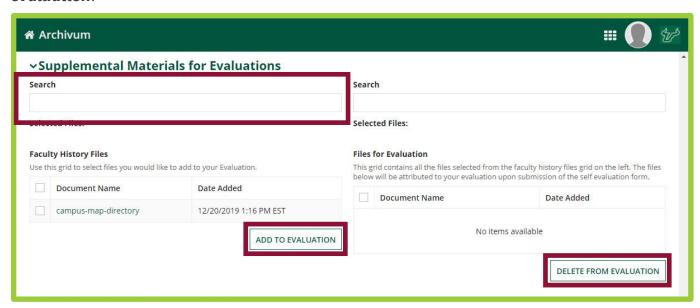


When entering narratives, please note there is a 12,000 character limit. The size of the text box can be adjusted by clicking and dragging the bottom right corner.



# **Supplemental Materials**

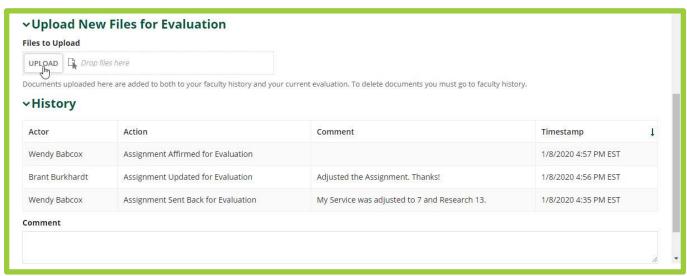
You can add supplemental materials by including files from your faculty history or adding directly. To add files from your faculty history, search for files and then select *Add to evaluation*.



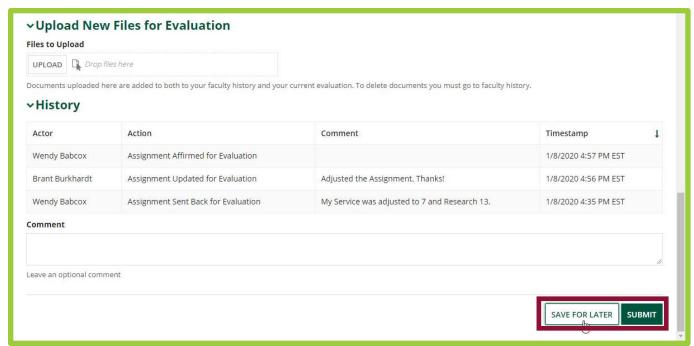
Files can be removed from your self-evaluation by searching and then selecting **Delete from evaluation**. This will only delete files from your self-evaluation and not your faculty history.



Additional files can also be uploaded using the **Upload new files for evaluation** tool. Files added here will also be added to your faculty history.



Once you've finished your self-evaluation you can select **Save for later** or **Submit**.



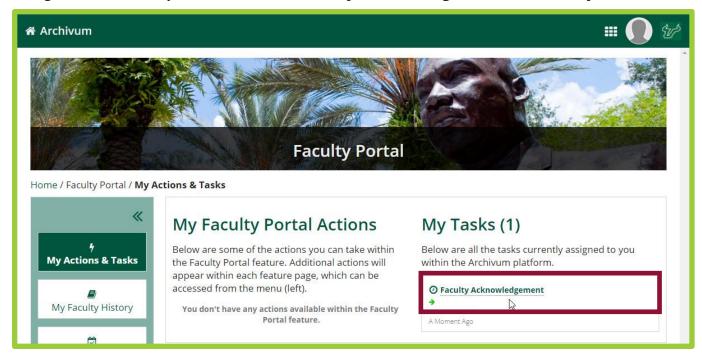
To complete the process, selecting **Submit** will generate a task and notify the next person to perform their part of the process.



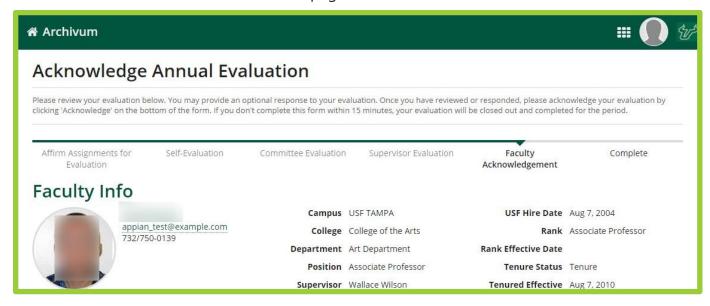
For example, if your evaluation process requires a committee, the committee chair will be notified. If your process does not require a committee, your supervisor will be notified.

### **Acknowledge Evaluation Ratings**

Navigate to the Faculty Portal. Select the Faculty Acknowledgment task under My Tasks.



Review the evaluation information on this page.





#### *Evaluation Timeline*

**Evaluation Timeline for COTA ART & ART HISTORY** 

Evaluation Stage	Deadline	Countdown
Self-Narrative	Mar 2, 2020 12:00 AM	47 days
Peer Committee Evaluation	Mar 23, 2020 12:00 AM	68 days
Supervisor Evaluation	Apr 13, 2020 12:00 AM	89 days
Evaluation Deadline	Apr 27, 2020 12:00 AM	103 days

Unit Guidelines https://www.guidelines.com/usfcota.html 🗗

Assignment for	or Evaluation
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	Assignment
Teaching	70
Research	25
Service	5
Admin	0
Clinical	0
Other	0

#### **∨Evaluation Narratives**

Teaching Self Narrative

I teach excellently.

Show Teaching Work for the 2019 Evaluation Period

Research Self Narrative

I do excellent research.

Show Research Work for the 2019 Evaluation Period

Service Self Narrative

I provide excellent service.

Show Service Work for the 2019 Evaluation Period

**Committee Narrative** 

He does excellent work.

Supervisor Narrative

He really does do excellent work.

#### **∨**Evaluation

Note: Eval ratings may take up to one (1) full business day to appear. If you don't see your ratings after two (2) business days, please contact the help desk.

	Self Rating	Committee Rating	Supervisor Rating
Teaching	5	5	5
Research	5	5	5
Service	5	5	5

#### ~History

Actor	Action	Comment	Timestamp	3
	Submit Supervisor Evaluation		1/9/2020 2:30 PM EST	
	Submit Committee Evaluation		1/9/2020 1:56 PM EST	
	Submit Self-Evaluation		1/9/2020 1:18 PM EST	
	Evaluation Reverted to Self-Evaluation	Reason: I think you understated your research and teaching.	1/9/2020 1:15 PM EST	
	Evaluation Reverted to Self-Evaluation	Reason: I think you understated your research and teaching.	1/9/2020 1:15 PM EST	



You can include an option response to your acknowledgement of the evaluation in the bottom text box. Once you're finished, select the Acknowledge Evaluation button.

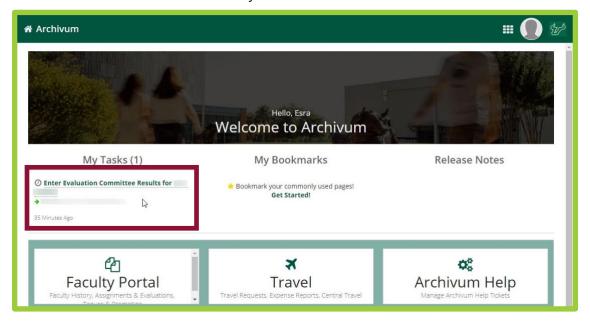
→Respond to Evaluation	
Provide an optional response to your annual evaluation. Max characters: 12000	
0/12000. Your supervisor will be able to view your response.	
usftest.appiancloud.com/suite/sites/archivum/page/archivum/record//summary	SAVE FOR LATER ACKNOWLEDGE EVALUATION

### Committee Chair

# **Adding Committee Evaluation**

As a committee member you will review the faculty member's evaluation and supplemental materials. As the committee chair you will rate the faculty member and add your committee's narrative to the evaluation.

Log into Archivum and then select the faculty portal. Select the *Enter Evaluations Committee*\*Results\* task for the desired faculty member.

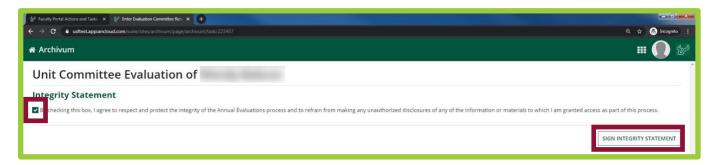




You must accept the task before proceeding.

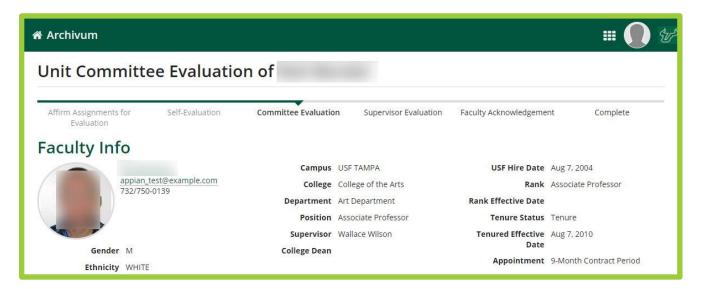


You will then need to agree to an integrity statement by checking the box and selecting **Sign integrity statement**. This will only need to be done for the 1st evaluation completed in the cycle.

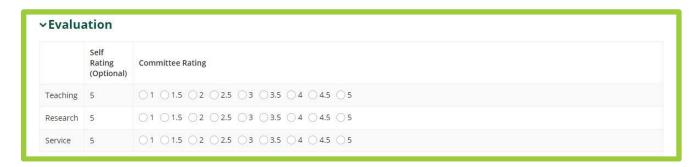


Subsequent evaluations will skip this step.

On the evaluation page that appears, make your committee rating selections.







Then fill in the narrative below the rating section.



When finished, select **Submit**.



This will generate a task and notify the supervisor to perform their evaluation.

Your part of the process is now complete.



### Supervisor

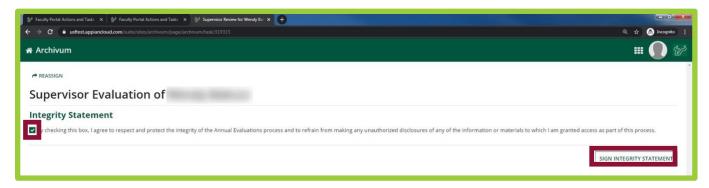
### **Adding Supervisor Evaluation**

As the Supervisor, you will rate the faculty member and add your narrative to the evaluation.

Navigate to the *Faculty Portal*. Select the *Supervisor Review* task for the desired faculty member.



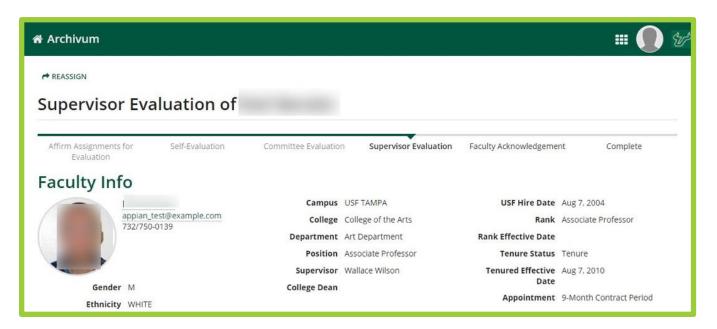
You must accept the task before proceeding. You will then need to agree to an integrity statement by checking the box and selecting **Sign integrity statement**.

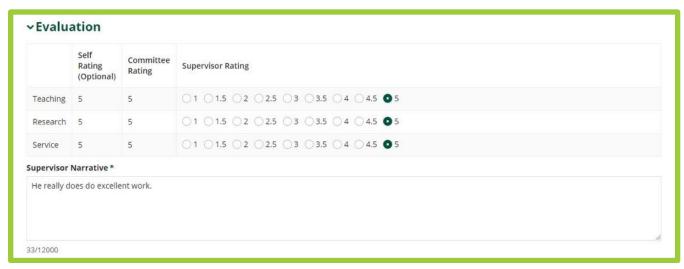




This will only need to be done for the 1st evaluation completed in the cycle. Subsequent evaluations will skip this step.

On the evaluation page that appears, select the rating for each item.





Then fill in the narrative.

Select **Submit** when you're finished. This will generate a task and notify the faculty member to acknowledge the evaluation.





Your part of the process is now complete.