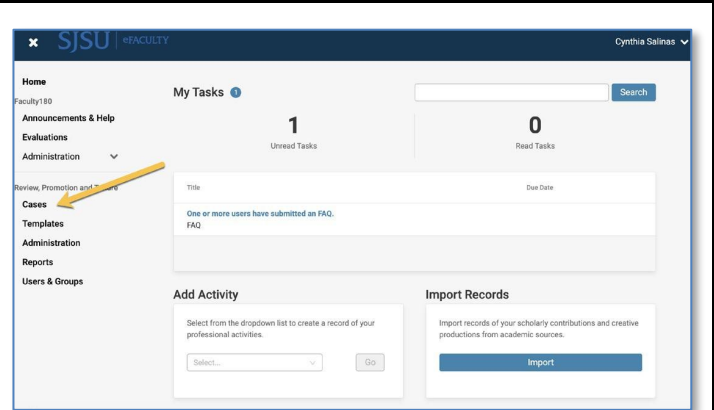


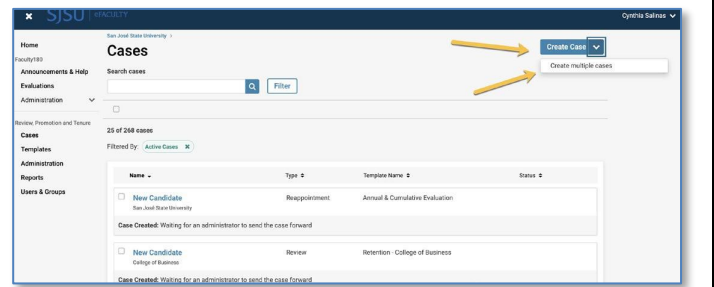
HOW TO CREATE MULTIPLE CASES

eFaculty supports creating cases in bulk. Individual cases may also be created following these steps. Follow these instructions to create one or more cases:

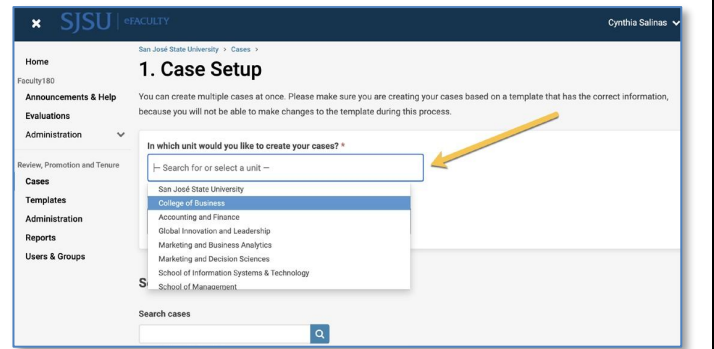
1. On the left-hand side, select "Cases."



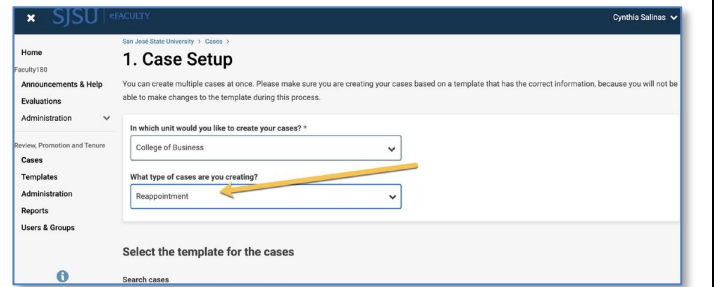
2. At the top right, select "Create Multiple Cases" to begin to create multiple cases



3. Select the department (or college) with which you are associated. If your department is not listed, please contact UP-FS directly at [efaculty@sjsu.edu](mailto:efaculty@sjsu.edu).



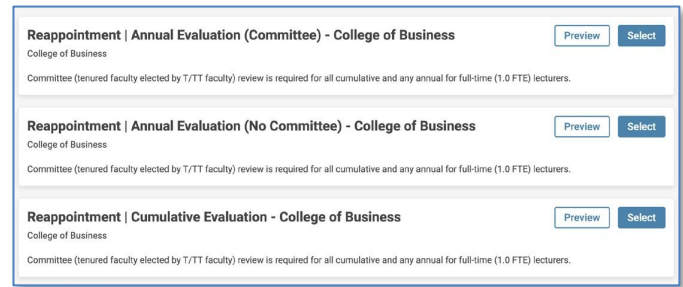
4. The eFaculty "type" for Annual and Cumulative evaluation will be "Reappointment." Select "Reappointment."



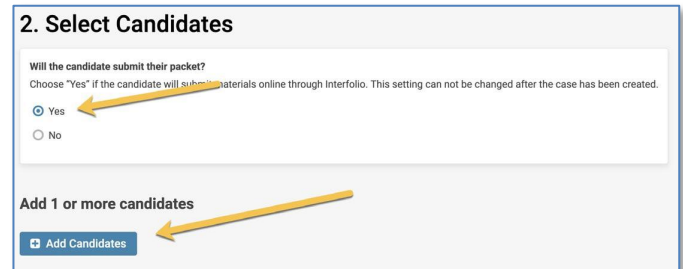
5. Select the appropriate template associated with the review type and the college or department:

- Annual Evaluation (Committee)
- Annual Evaluation (No Committee)
- Cumulative Evaluation

Select "**Continue**" to move to the next step.



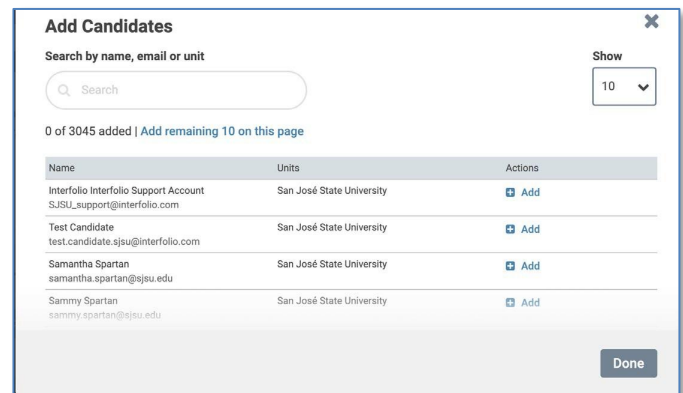
6. For Step #2: select "Yes," so the candidate can submit materials online through Interfolio. Select "Add Candidates" to add the temporary faculty to be reviewed.



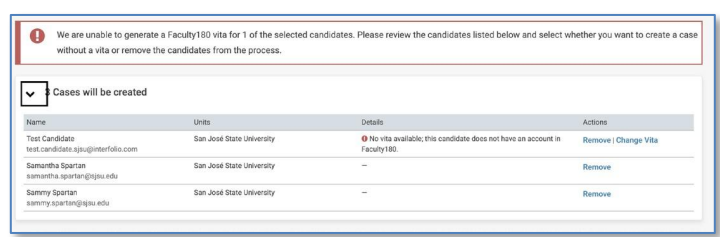
7. Select the candidates by using the Search Bar. Select "+Add" to add each candidate. The candidates' names will be the candidate's official name, and it is associated with their SJSU email.

After the candidates have been added, select "Done" to return back to Step #2. Then select "Continue" to move to the next step.

**Tip:** Try first name if last name doesn't work in search. If not found at all, contact [efaculty@sjsu.edu](mailto:efaculty@sjsu.edu). Be prepared to submit all faculty in your unit not found prior to emailing UP - FS.

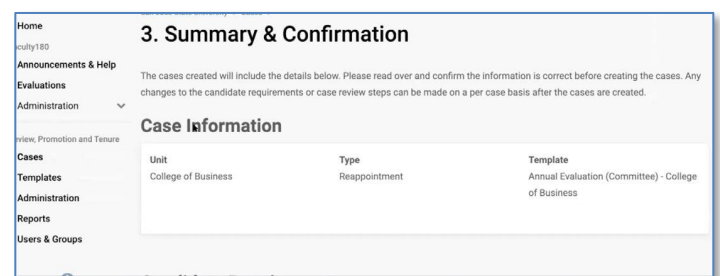


8. An error may appear, indicating that eFaculty cannot generate a Faculty180 Vitae for the faculty member. You will not be able to continue creating multiple cases if this error occurs. Contact UP-FS [efaculty@sjsu.edu](mailto:efaculty@sjsu.edu) to solve the issue. You can remove the names that are associated with this error and create those cases later.



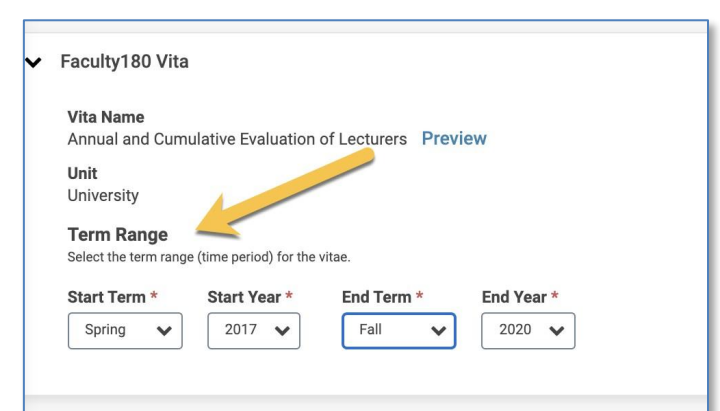
9. The next step is Step #3: Summary & Confirmation.

**Note:** In some cases, the viewer will automatically go to the bottom of the page; if this is the case, **scroll to the top** of the page to see the title.



10. Under "Candidate Requirements", in the "Faculty180 Vitae" section, select the Term Range (time period) for the evaluation.

- Annual evaluation: typically the prior calendar year starting with spring (or Winter) to fall of the prior calendar year.
- Cumulative evaluation:
  - Initial 3 year appointment: typically the prior six academic years, from start semester to current spring semester
  - Renewal 3 year appointment: typically the prior 3 academic years, first fall through current spring semester of current appointment



<p>11. Date settings for Annual Evaluation in AY 22-23.</p>	<p>Spring 2022 - Fall 2022</p>
<p>12. Dates for Cumulative Evaluation in AY 22-22 for six-year faculty up for initial 3-year appointment.</p>	<p>6 years Fall 2017 - Spring 2023</p>
<p>13. Dates for Cumulative Evaluation in AY 22-23 for "entitled" faculty up for renewal 3-year appointment.</p>	<p>3 years Fall 2020 - Spring 2023</p>
<p>14. Next, you'll see the cases that you'll be creating. Since you'll be adding materials to the cases, it's best NOT to contact the faculty at this time. Select "<b>No</b>," so the candidate is not notified now.</p> <p>You (or Administrator) will notify the candidates once the case is complete (see guide: "Notifying Candidates of Case Creation").</p> <p>Select "Create # Cases" to move to the next step. In this example, the button is titled "Create 3 Cases" since three cases are being created.</p>	