

## Part 3: Moving Faculty Cases to College Level

### Sharing College Evaluations with Faculty

*Scott Nguyen  
Faculty Services  
University Personnel*



Pg. 3: Important Information and Deadlines

Pg. 4: Required Documents

Pg. 5: Send to Step 3

Pg. 6: Sending the Case Forward

Pg. 7: Template: Moving Case to College-Level Review

Pg. 8: Sharing College Review — **No Optional Response Required**

Pg. 9: Sharing Documents and Optional Response

Pg. 10: Annual Evaluation — College-Level Decision

Pg. 11: Cumulative Evaluation — College-Level Decision

Pg. 12: Contact Information



## Committee Review Due if Chair Submits Separate Review

- As a reminder, if the **Department Chair plans to submit a separate review**, the **committee must submit its review by the date listed in the calendar** so the Chair has access to it in advance.

## Committee/Chair Submission

- *If the Chair serves on the committee, a separate review is not required. The review may be submitted on the Chair's submission date listed in the calendar.*

## Department sends 10-day Optional Response after the Department Level Submission

- Departments send the **10-day optional response** after the **Department-level submission**.
- If a committee member has **not submitted their review or signed the confidentiality agreement**, the case **cannot move forward as required**. This may also result in a **delay to the 10-day optional response timeframe**.



# Required Documents

Please note:

- If you see “**Required Documents**,” this indicates that the case is missing one or more forms needed to move forward to the next step.
- This may be due to a **missing review** or an **unsigned confidentiality agreement**.
- Please contact **Faculty Services** for assistance in confirming which required documents are outstanding.

Name ▾	Type ▴	Template Name ▴	Status ▴
<input type="checkbox"/> <b>Samantha Spartan</b> Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level   Feb 26, 2025 ⚠ Required Documents			
<input type="checkbox"/> <b>sammy spartan</b> Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level   Feb 26, 2025			

Here you can see that Sammy has all required documents submitted and is ready to move forward, whereas Samantha Spartan is still missing documents and cannot be moved to the next step.



Cases should now be moved from **Step 2 to Step 3**. Please **refer to the calendar for the appropriate dates** on when faculty cases should be moved through each step.

At **Step 3**, the **Dean and/or appropriate administrator** will complete and submit the **final review** for the faculty member.

Name ▾	Type ▾	Template Name ▾	Status ▾
<input checked="" type="checkbox"/> Sammy Spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level			

↓

Name ▾	Type ▾	Template Name ▾	Status ▾
<input type="checkbox"/> Sammy Spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 3 of 4: Dean or Appropriate Administrator ⚠ Required Documents			



# Sending the case forward

Moving cases forward will follow the same steps outlined in **Step 2**:

- Locate the faculty case you want to move forward.
- Select the **checkbox** next to the faculty member's name.
- Click **“Send Forward.”**
- Add the appropriate **template for the College-Level Reviewer.**

San José State University >

## Cases

CREATE CASE

Search cases

sammy spartan

Filter

☐ Notify Candidates
 ☒ Send Backward
 ☒ **Send Forward**
☐ Close Cases
 ☐ More Options

2 of 2 cases

Filtered By: Reappointment Active Cases Reset Filters

Name	Type	Template Name	Status
<input checked="" type="checkbox"/> Sammy Spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	

Step 2 of 4: Department Level

☐ Sammy Spartan  
Accounting & Finance  
Case is with candidate

Reapp

**Send Cases Forward**

Please confirm you wish to send the following cases forward to the next step in the review process.

Sammy Spartan is moving forward to "Dean or Appropriate Administrator"

☒ Send a message to the reviewers gaining access.  
If recipients respond to this message, their response will come directly to your email inbox.

Subject

Message Subject

Message

Dear committee members,  
 This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.  
 Best,  
 Scott Nguyen

Preview Send Cancel



**Dear Dean/Appropriate Administrator:**

This evaluation is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in. For help initiating your review, please visit our [reviewers guide](#), our [eFaculty Training and Help](#) page, or the help pages under your name in the extreme upper right corner of your eFaculty account. If the wrong faculty member is designated chair, they may assign manager duties to the properly elected chair.

[Link to Template](#)



# Sharing College Review - **NO Optional Response Required**

---

**Once the College Level reviews have been submitted, the Dean, appropriate administrator, or assigned delegate is responsible for sharing the final decision from the Dean's-level review.** Please ensure that this review is communicated to the faculty member, as the version shared with them constitutes the **final review**.

You may copy and paste the provided template from the next slide, or use your own template in the Subject and Message fields.

**Reminder:** The College-Level Review is the **final review** being shared.

A 10-day optional response period is **not required** at this stage. However, if the faculty member wishes, they may upload a response to their PAF.





# Sharing Documents and Optional Response

## To Share Documents

- Click the **checkbox** next to the document you wish to share.
- Click “**Share**” located in the **blue bar**.
- Select “**With Candidate.**”
- You will then be taken to the next page.

**Internal Sections**

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

[> Department Assisted Document Upload](#)
[Edit](#)
[Add File](#)

[> Department Committee](#)
[Edit](#)
[Add File](#)

[> Department Chair](#)
[Edit](#)
[Add File](#)

[v Dean or Appropriate Administrator](#)
[Edit](#)
[Add File](#)

**Materials**

No files have been added to this section.

**Committee Forms**

Title	Details	Actions
<input checked="" type="checkbox"/> Annual Evaluation Form - Appropriate Administrator   Step 3: Annual & Cumulative - MPP - College of Education	Last Response Submitted Apr 3, 2025	<a href="#">Edit</a>

[> Faculty Services](#)
[Edit](#)
[Add File](#)

**Case Materials** Case Details

Search case materials by title

[Q](#) [Read Case](#)

☐ [Expand All](#) [Collapse All](#) [Share](#) [Settings](#) [Move](#)



Dear Faculty Member,

The College has concluded its review of your **annual** evaluation. The decision is attached, and it will be placed in your Personnel Action File (PAF). Decisions do not entail a 10-day optional response period.

However, pursuant to Provision 11.2 of the CSU-CFA Collective Bargaining Agreement, faculty shall have the right to submit material to their PAF. This may occur at any time by sending the material to Faculty Services.

[Link To Template](#)



Dear Faculty Member,

The College has concluded its review of your **Cumulative** evaluation. The decision is attached, and it will be placed in your Personnel Action File (PAF). Decisions do not entail a 10-day optional response period.

However, pursuant to Provision 11.2 of the CSU-CFA Collective Bargaining Agreement, faculty shall have the right to submit material to their PAF. This may occur at any time by sending the material to Faculty Services.

[Link to Template](#)



Questions or need 1 on 1 assistance, please contact:

[eFaculty@sjsu.edu](mailto:eFaculty@sjsu.edu)

[scott.nguyen01@sjsu.edu](mailto:scott.nguyen01@sjsu.edu)

[Open Lab Schedule:](#)

Tuesday 2pm-3pm : <https://sjsu.zoom.us/j/83578498656>

Thursday 9am - 10pm : <https://sjsu.zoom.us/j/83578498656>

By Phone: x4-2204

