

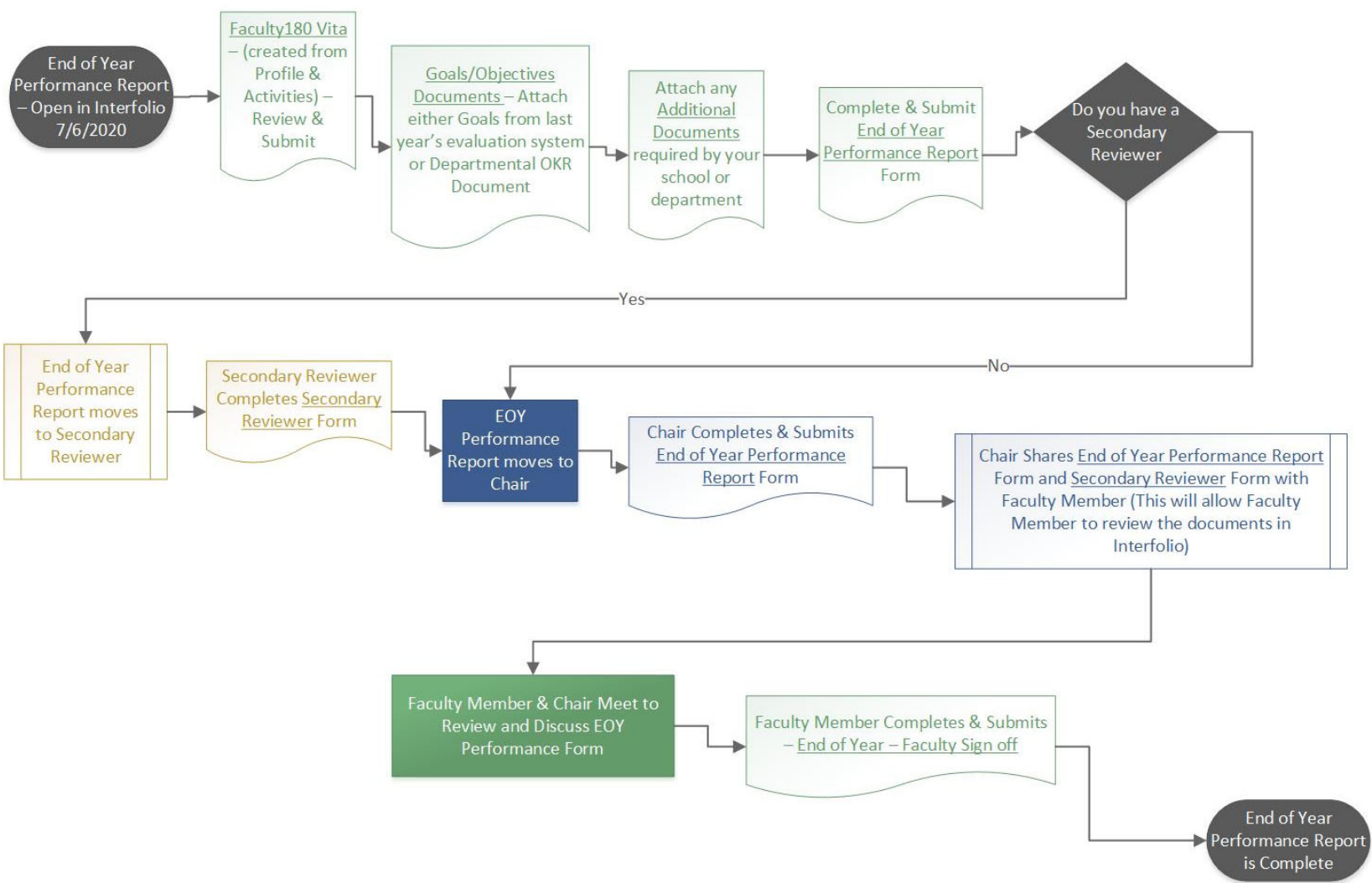
Interfolio

2021 Faculty Annual Review



Why Interfolio

- Interfolio collects faculty data in the Faculty180 Profile and Activity sections and integrates with the Faculty Review, Promotion & Tenure module.
- Interfolio will be used not only for Annual Reviews, but for scheduled quarterly OKR check-ins, Promotion, Tenure and Post Tenure Reviews.
- Using one system for all Faculty data and reviews is optimal.



End of Year Performance Report
– Open in Interfolio
7/6/2020

Faculty180 Vita
– (created from Profile & Activities) –
Review & Submit

Goals/Objectives Documents – Attach
either Goals from last year’s evaluation system
or Departmental OKR Document

Attach any Additional Documents
required by your school or department

Complete & Submit End of Year
Performance Report Form

Do you have a
Secondary Reviewer

End of Year Performance Report moves
to Secondary Reviewer

Secondary Reviewer Completes Secondary
Reviewer Form

EOY Performance Report moves to
Chair

Chair Completes & Submits
End of Year Performance Report Form

Chair Shares End of Year Performance Report
Form and Secondary Reviewer Form with
Faculty Member (This will allow Faculty
Member to review the documents in
Interfolio)

Faculty Member & Chair Meet to
Review and Discuss EOY Performance Form

Faculty Member Completes & Submits
– End of Year – Faculty Sign off

End of Year Performance Report
is Complete

Annual Review opens June 21

Faculty will receive an email notification that the review period is open:

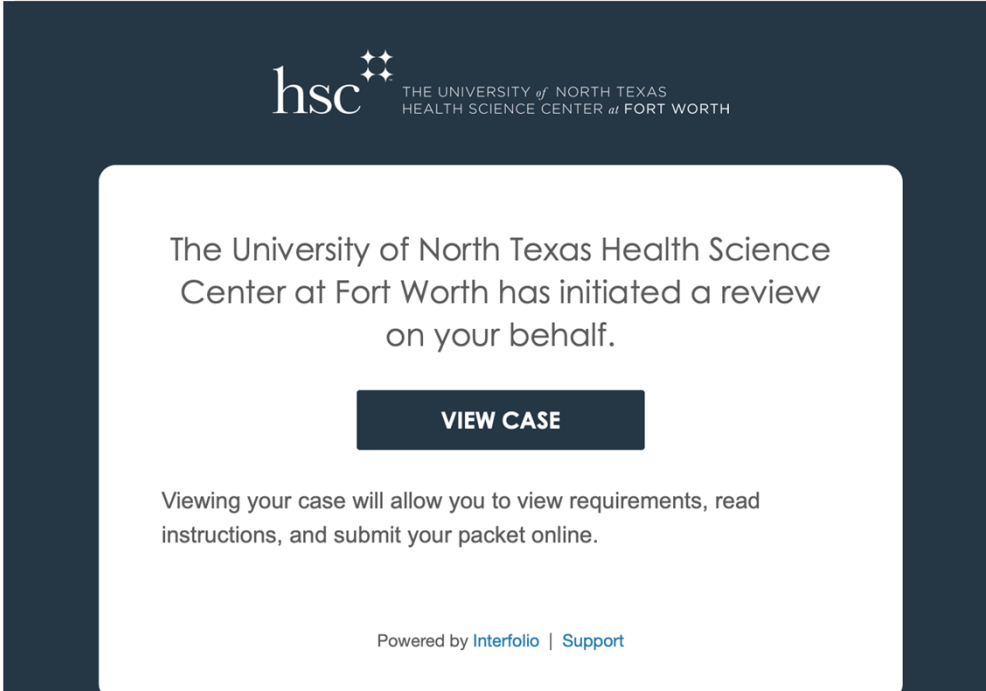


○ The University of North Texas Health Science Center at Fort Worth <noreply@interfoli...

Tuesday, May 19, 2020 at 8:26 AM

○ Williams, Jackie

[Show Details](#)

A screenshot of an email notification. The header features the 'hsc' logo with three stars and the text 'THE UNIVERSITY of NORTH TEXAS HEALTH SCIENCE CENTER at FORT WORTH'. The main body text reads: 'The University of North Texas Health Science Center at Fort Worth has initiated a review on your behalf.' Below this is a dark blue button with the text 'VIEW CASE'. Further down, it says: 'Viewing your case will allow you to view requirements, read instructions, and submit your packet online.' At the bottom, it states 'Powered by Interfolio | Support' with a link to 'Support'.

hsc THE UNIVERSITY of NORTH TEXAS
HEALTH SCIENCE CENTER at FORT WORTH

The University of North Texas Health Science
Center at Fort Worth has initiated a review
on your behalf.

VIEW CASE

Viewing your case will allow you to view requirements, read
instructions, and submit your packet online.

Powered by [Interfolio](#) | [Support](#)

Annual Review/July OKR Check-In opens June 21

Log into Interfolio to see your Action Items:

The screenshot displays the Interfolio user interface. At the top left, the logo for the University of North Texas Health Science Center at Fort Worth (hsc) is visible. The main header area says "Welcome back, Jackie Williams". Below this, the "Your Action Items" section is highlighted, showing a link for "Jackie Williams" and a sub-link for "End of Year Performance Report - Faculty | The University of North Texas Health Science Center at Fort Worth | Review". A red arrow points from the text "Click on your name to view your review" to the "Jackie Williams" link. The left sidebar contains a navigation menu with items: Home, Your Packets, Faculty180, Announcements & Help, Profile, Activities, Forms & Reports, Vitas & Biosketches, Find Colleagues, Account Access, and Administration.

The Overview Screen shows progress on each step.

The University of North Texas Health Science Center at Fort Worth > Your Packets >

End of Year Performance Report - Faculty

Unit
The University of North Texas Health Science Center at Fort Worth

Type
Review

Candidate Instructions
[View Instructions](#)

[Preview Packet](#)

Overview **Packet**

Click Packet to complete you review

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward your packet. To learn more, read the [Candidate's Packet Guide](#).

Faculty180 Vita

Locked

[View](#)

Type
✓ Annual Evaluation

Candidate Requirements

Not Yet Submitted Unlocked

[Edit](#)

Type	# Required	# Added
✓ Optional Documents	0 required	1
✓ FY20 End of Year Performance Report - Faculty	3 required	3

Annual Review Completion

Submitted Locked

[View](#)

Type	# Required	# Added
✓ End of Year - Faculty Sign off	1 required	1

Faculty Member - Requirements

Faculty members must submit the following:

- **Annual Faculty Activity Report**
 - Automatic feed from Interfolio Faculty180 Profile and Activity Sections.
 - Displays faculty activities for the last 12 months.
 - Click Regenerate if you make changes in Profile or Activities that need to be included in your review
 - Annual Faculty Activity Report can be viewed in Vitas & Biosketches
- **Objectives and Key Results**
 - Faculty OKRs will populate as part of their Faculty Activities Report (nothing for faculty to update).
- **Any additional documents required by their school or department.**
 - Instructions will be provided by the Dean's office.
- **EOY Performance Report**
 - Faculty self report of teaching, service, research and values.
 - Links to the Collegiate Guidelines are at the top of the form and in the Candidate Instructions on the Overview page

End of Year Performance Report - Faculty*

Preview Packet

Unit
Biomedical Sciences

Type
Review

Candidate Instructions
[View Instructions](#)

Overview Packet

Expand All Collapse All

Faculty180 Vita
Not Yet Submitted **Unlocked** [Submit](#)

Title	Details	Actions
Annual Faculty Activity Report Summer 2019 - Spring 2020 1 attachment included	Generated Jun 24, 2020	Regenerate

Candidate Requirements
Not Yet Submitted **Unlocked** [Submit](#) 0 of 1 Required Files

Optional Documents 0 Added [Add](#)

Upload any relevant files to support your goals that are not included in your Faculty Activity Report or may be requested by your School/College.

No files have been added yet.

FY20 End of Year Performance Report - Faculty 3 required questions, [Fill Out Form](#)

This form has not been complete.

Submit both sections at the same time after completion

Use the **Add** Button to upload files.

Fill Out Form to complete your self evaluation

Chair/Designee Review of Faculty Member

- The review will move to the Chair or Designee after the Secondary Reviewer or if the faculty member does not have a Secondary Reviewer, directly to the Chair or Designee.
- The Chair/Designee will complete the EOY Performance Report (Faculty Form and/or Administrator Form).
- After the Chair/Designee completes the EOY Performance Report form, they will share the form and any Secondary Reviewer forms with the faculty member.
- Faculty Members will receive an email that the documents are available for review.

View Documents Shared with you

An email will notify you that documents have been shared. Log into Interfolio to view the documents. You should see the following action items. Select the Action Item with **Open for Response**.

Welcome back, Nancy Staples

Your Action Items

Nancy Staples

Document Shared

End of Year Performance Report - Faculty* | Biomedical Sciences | Review



Nancy Staples

Open for Response

Biomedical Sciences | Review | End of Year Performance Report - Faculty* | Review, Promotion and Tenure



Select **Read Case** to view your review

Nancy Staples

[Send Case](#) [Case Options](#)

Unit
Biomedical Sciences

Template
End of Year Performance Report - Faculty*

Status
[Select Status](#)

[Case Materials](#) [Case Details](#)

Search case materials by title

[Read Case](#)

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

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

▼ **Faculty180 Vita** Locked [View History](#) [Unlock](#)

Title	Details	Actions
<input type="checkbox"/> Annual Faculty Activity Report Summer 2019 - Spring 2020 1 attachment included	Generated Jun 8, 2020	Edit

Packet Annotations

- > FACULTY180 VITAE
- > CANDIDATE REQUIREMENTS
- > FACULTY SIGN OFF
- ▼ COMMITTEE DOCUMENTS



Faculty submitted documents

Secondary Reviewer | Secondary Reviewer

End of Year Performance Report for Faculty - completed by Administrator (Chair/Designee) | Chair Review

Documents submitted by Reviewers are in Committee Documents

End of Year Performance Report for Faculty - completed by Administrator (Chair/Designee)

Candidate Name
Nancy Staples

Responses from:
Step 2: Chair Review

1 Responses Submitted

Name	Role	Details
Devetra Patrick Devetra.Patrick@unthsc.edu	Manager	Submitted Jun 8, 2020 at 12:02 PM



Increase magnification of documents

Next Step

- The Chair/Designee will meet with the faculty member.
- The faculty member will go back into Interfolio and complete the EOY – Faculty Sign off.
- Review is complete after the Sign Off (deadline August 16th).

EOY – Faculty Sign Off

End of Year - Faculty Sign off

Faculty Member Confirmation of Completion - not to be completed until after the faculty member has met with their supervisor.

By selecting Yes, you confirm that you have met with your supervisor *

Yes

Faculty Member Comments - Optional

100 word limit

Timeline

- Monday, July 6 – EOY Performance Review is opened in Interfolio.
- Monday, July 18 - Deadline for faculty to complete their self-appraisal portion of the EOY Performance Report.
- Friday, July 31 - Deadline for Department Chairs to complete the EOY Performance Reports for their faculty.