

The University of Texas at San Antonio

Digital Measures

Instructions for Creating “Annual Report – Chair/Dean Evaluations” of Faculty

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Annual Report – Chair/Dean Evaluations

In this manual you will find:

- How to **log in** to Digital Measures.
- How to **review a faculty member’s archived annual report**.
- How to **create your evaluation of a faculty member** in Digital Measures.
- How to **review your faculty evaluations** in Digital Measures.

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ANNUAL REPORT – CHAIR/DEAN EVALUATIONS

Introduction

The following instructions will enable you to complete the evaluation for each of your eligible faculty members for determination of merit allocation. Follow the steps outlined in this manual to complete the annual evaluation for each of your eligible faculty members (if you are a department chair) or for each of your department chairs or direct reports (if you are a dean).

Policy and Guidelines

UTSA policy governing faculty evaluation can be found in HOP 2.11 “Annual Faculty Performance Appraisal for Merit Pay Consideration.”

If you have questions regarding evaluation of faculty members, additional guidance can be obtained by contacting the Office of the Vice Provost for Academic and Faculty Support (458-2700).

Access Archived Faculty Evaluations

Before beginning the evaluation process in Digital Measures (DM), you should access the faculty member’s official archived annual report for reference while you evaluate her/his contribution. These reports can be accessed on the Digital Measures archive site (link provided below). It is preferable to use the [archived annual reports](#) so that you are viewing a “snapshot” of the report that was completed by the faculty member by the deadline date. Because DM is a live database, if you generate the faculty member’s annual report in DM (rather than using the archived report), any changes made to his/her data since the faculty deadline date will be reflected in the annual report you run in DM.

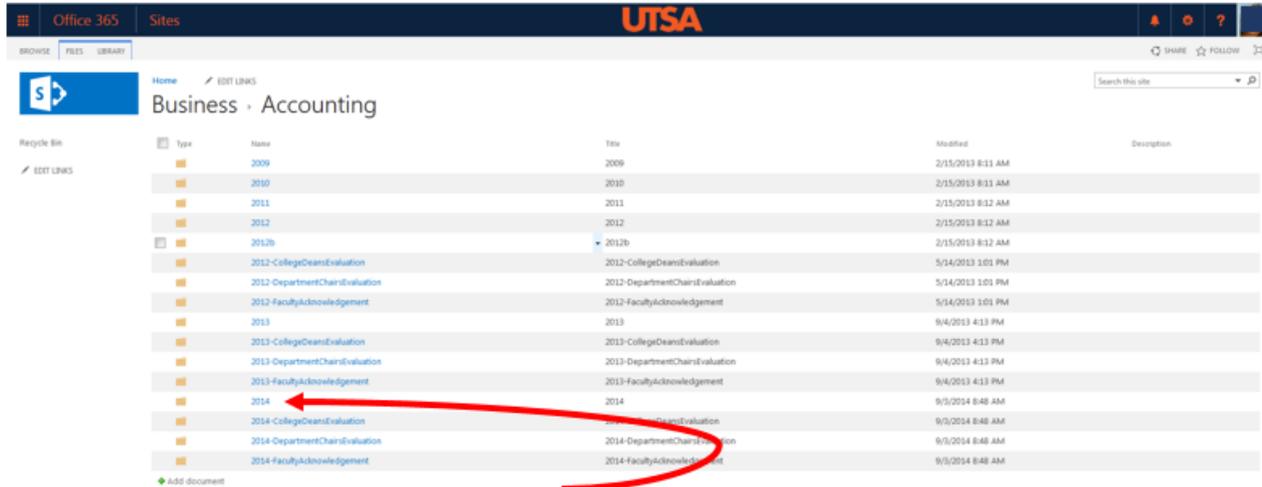
To access the faculty member’s archived official annual report:

Go to: <https://utsacloud.sharepoint.com/sites/dmai/>

(This address can also be accessed from the ‘DM Archives’ page on the UTSA Digital Measures web site.)

- An Office sign-in page will open. Enter your UTSA email address (no password) and click on **[Sign in]**. You will be routed to the UTSA sign-in screen. Enter your passphrase. When the Digital Measures Archive page opens, click “Annual Report.”
- Click the appropriate college and then appropriate department, if applicable. (Your permissions may take you straight to your college or department.)

- Once you are at the department level, your screen should look similar to this:



- Select the folder for the year you are evaluating. (For example, as shown in the screen shot above, you would click “2014” if you wish to retrieve the faculty annual reports for the evaluation year 2014.)
- When the folder opens, individual files for each of the faculty members in the department will be listed.
- Click the appropriate faculty member’s file. The faculty member’s official archived annual report will open as a pdf. You may leave it open, print it, and/or save it to your hard drive.

Log in to Digital Measures

- In the address field of your preferred browser, type: <http://my.utsa.edu>.
- Click **Digital Measures** under **Faculty/Staff Resources**.
- You will be taken to the UTSA Digital Measures site. (You may wish to save this page to your Favorites or Bookmarks in your preferred browser.)
- From the landing page, click the orange **UTSA Digital Measures** button on the upper right side of the page to reach the Digital Measures log-in page:



- Log in using your **myUTSA ID (abc123)** and **passphrase**.

Create Evaluations of Faculty Members

You must first access the screens of the faculty member you will be evaluating so that you can enter your evaluation of the faculty member. Click **Activities** in the top menu bar; a short drop-down list will display with “Manage Activities” and “Manage Data” as the two available options. Click “Manage Data.”

A new screen will open with **Manage Data for Users** displayed. To the right, is a field (“User”) with a down arrow on the right side of the box. Click the down arrow to display the drop-down list of your faculty members. This list should contain only the names of your active department faculty members (or those in your college, if you are a dean). Click the name of the faculty member you are evaluating to select and click the **[Continue]** box to the right. The main entry menu for the faculty member you selected will open and you will now be accessing the data entry screens of the faculty member rather than your own screens. (You should see text across the top of the screen that says **You are currently managing data for [Name of Faculty Member].**)

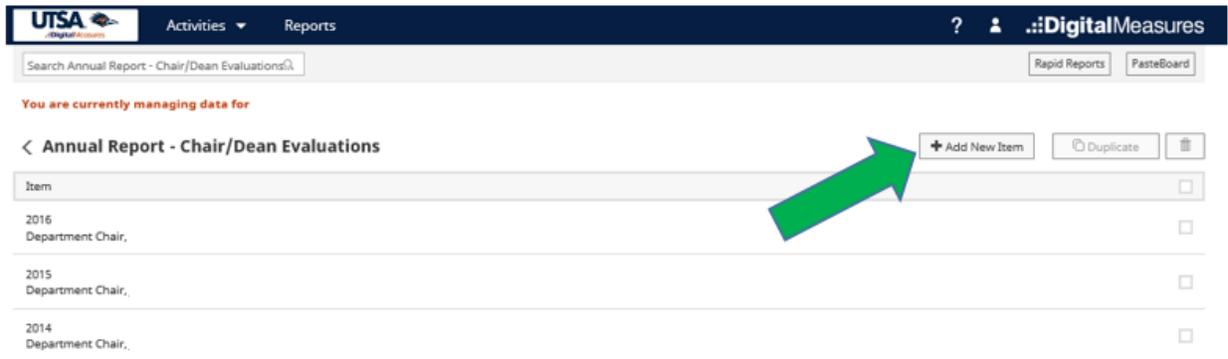
In the **Faculty Reports and Evaluations** section near the bottom of the screen, click the link, ‘Annual Report - Chair/Dean Evaluations.’ (Depending on your monitor settings, you may need to scroll down.)

The screenshot shows the UTSA Digital Measures interface. At the top, there is a navigation bar with 'Activities' and 'Reports' menus. Below the navigation bar, there is a search box and a 'You are currently managing data for' notification. The main content area is divided into several sections, each with a dropdown arrow and a title: 'General Information', 'Teaching', 'Scholarship/Research/Creative Works', 'Service', and 'Faculty Reports and Evaluations'. Each section contains a list of links. A green arrow points to the 'Annual Report - Chair/Dean Evaluations' link in the 'Faculty Reports and Evaluations' section.

The summary screen for 'Annual Report - Chair/Dean Evaluations' will open, with a list of any existing evaluation records created for the faculty member.

Create a New Record

If no record exists for the evaluation year, click the **[+Add New Item]** button. The evaluation screen will open for you to add your evaluation.



The screenshot shows the 'Annual Report - Chair/Dean Evaluations' summary screen. At the top, there is a navigation bar with 'UTSA Digital Measures' and 'Reports'. Below the navigation bar, there is a search bar and buttons for 'Rapid Reports' and 'PasteBoard'. The main content area shows a list of evaluation records for the years 2016, 2015, and 2014, each labeled 'Department Chair'. A green arrow points to the '+ Add New Item' button located at the top right of the list.

Edit an Existing Record

If you have previously created a record for the year to be evaluated, it will be listed by year on the summary screen. In that case, click the record for the year of interest. *(Please note: there should be only one record per year, per department chair or dean, for a faculty member. You may edit/save an existing record as much as needed prior to the evaluation deadline. Creating multiple records per year will cause the reports in Digital Measures to compile incorrectly.)*



The screenshot shows the 'Annual Report - Chair/Dean Evaluations' summary screen. At the top, there is a navigation bar with 'UTSA Digital Measures' and 'Reports'. Below the navigation bar, there is a search bar and buttons for 'Rapid Reports' and 'PasteBoard'. The main content area shows a list of evaluation records for the years 2016, 2015, and 2014, each labeled 'Department Chair'. A green arrow points to the '2016 Department Chair' record.

Copy/Duplicate an Existing Record

Another option for creating a new evaluation record is to copy (or duplicate) the previous year's record and then edit it for the current evaluation year. To do this, check the box to the far right side of the previous year's record and click the **[Duplicate]** box on the top right side of screen. This will open a duplicate copy of the previous year's record, which you may then edit and save. Be sure to change the "Evaluation Year" field to the year you are evaluating before saving!

Complete Your Evaluation of the Faculty Member

Once you have opened a new item, opened an existing record to edit, or duplicated a previous record to edit, complete the following fields as appropriate or confirm they were entered correctly:

- Choose your position (Department Chair or College Dean) from the drop-down list for "Evaluator Rank."
- Type the Evaluation Year in the space provided. *(Please note: this should be the calendar year being evaluated, not necessarily the current calendar year.)*
- Type the workload percentages for each faculty activity category (Teaching, Scholarship, Service, and Other) to accurately reflect the percentages you and the faculty member have agreed upon. **Important**: if these percentages are not completed, DM will not be able to calculate the faculty member's weighted score for each activity or the overall merit score. **Also important** - if a section has a percentage assigned, then a score must be given to that section in order to have correct calculations.)
- If you share responsibility for evaluating a direct report with another person (for instance, if one person is evaluating someone's teaching/research performance and another person is evaluating that person's administrative performance), please enter the data on the same evaluation record – do not create two separate evaluations unless each evaluator is performing a separate full evaluation.

You may wish to refer to the faculty member's official annual report (the pdf you opened earlier) to assist you in completing the remainder of the evaluation. For each category (Teaching; Scholarship, Research, and Creative Works; Service; and Other):

- Enter your narrative evaluation of the contribution the faculty member has made in each area. If you need more space than the text box permits, click and drag the bottom right portion of the text box to enlarge the box. You are not limited to the physical size of the text box. Each narrative field will allow a large amount of text.
- Enter your score for each area (0.000 to 5.000).
- Near the bottom of the screen, there is a field for "Overall Review Category" with a drop-down list of four options (screen shot on next page). This is a required field; you must select one of the four categories for each faculty member:

Certify completion of this Evaluation by typing in your name and the date in the Electronic Signature and Electronic Signature Date fields below. **SAVE AND RETURN** when this is complete.

Electronic Signature Date /

- Next, provide an “Overall Evaluation” for the faculty member. There is no need to determine the overall numerical score. *Though it will not display on this screen, DM will automatically total the weighted evaluations from each category of activity you have evaluated and enter it in the compiled report (“UTSA Annual Report – Department Chair’s Evaluation”).*
- When you have finished, type your name in the “Electronic Signature” field and complete the “Electronic Signature Date” fields with the date of your evaluation. This will display as your signature on the archived evaluation, so please type your name as you would sign it, using upper and lower case letters. Please do not use all caps or initials.
- Click the **[Save]** button at the top right side of the page to preserve your work. If you wish, you can return to the evaluation record later and edit it by clicking on the record on the summary screen for ‘Annual Report - Chair/Dean Evaluations’ (as shown on Page 4).

Review Completed Evaluations

If you’d like, once you have completed your evaluation of a faculty member, you may review the evaluation (wording and weighted scores) to verify that you have entered the correct information. To do so, you can use the **Rapid Reports** function:

- While still managing data for the faculty member, click on the **[Rapid Reports]** link under the far right side of the top menu bar. A white dialog box will open.

- Click the down arrow to the far right of the “Report” field to see a list of the reports available to you. Choose “UTSA Annual Report – Department Chair’s Evaluation” (or “UTSA Annual Report – College Dean’s Evaluation” if you are a dean).
- Select the Start Date and End Date for the evaluation period.
- Choose Microsoft Word for the File Format, and
- Click the **[Run Report]** button. Your evaluation of the faculty member will open as a Word document. This is the document that will be archived as the faculty member’s official evaluation. *(Please note: Do not type anything on this Word document, as it will not transfer to Digital Measures. If you need to make further comments or wish to edit your comments, return to the faculty member’s ‘Annual Report – Chair/Dean Evaluations’ screen and edit the record you have already created for the current evaluation year.)*

Begin a New Evaluation or Exit

When you have completed your evaluation of a faculty member, click the **Activities** link in the top menu bar and select “Manage Data” to select the next faculty member for evaluation. Repeat the steps beginning on page 3 for each faculty member being evaluated until all evaluations are completed.

Once you have completed the evaluations or when you are ready to end your session, click the icon next to the Digital Measures log in the top menu bar and select “Log Out.” This will end your session and return you to the UTSA Digital Measures web site.