

# Electronic Comprehensive Periodic Evaluation Guide for Tenured Faculty

## About Electronic Comprehensive Performance Evaluation

Electronic comprehensive periodic evaluation will be required for all tenured faculty members.

All deadlines for material submission will remain the same.

## What To Expect:

### The Electronic Process

The electronic process will be completed using UTSA's SharePoint application.

SharePoint is a cloud-based service that allows UTSA faculty and staff to securely upload, access and share documents online. Each faculty member has a free account that can be accessed through their UTSA webmail - users may log in using their UTSA network ID (abc123) and password.

A separate SharePoint site has been created for the Comprehensive Periodic Evaluation process (account name: *Faculty Review*). This account is not tied to any individual user ID (abc123) and will be managed by the Provost Office.

A folder with the faculty member's name will be created in the *2018\_CPE* folder on SharePoint. This folder will be used by the faculty to submit their electronic "box."

### Folder Structure in Your CPE SharePoint Folder

Once faculty members have been given access to their Faculty Review folder in SharePoint, they will find the following folders/sections prepared for them. Folders will follow the same order as had been done with the paper box:

1. 01\_CoverSheet\_Checklist
2. 02\_Vita
3. 03\_SummaryStatement
4. 04\_SummaryofStudentCourseEvaluations (include Student\_Course\_Evaluation\_Template)
5. 05\_PeerObservation  
Peer\_Observation\_Report (*This includes the Peer Observer's Report(s) and the Faculty Member's Report(s). Note: To be filled by department chairs*)
6. 06\_AnnualReports\_AnnualEvaluations
7. 07\_OptionalSupplementaryMaterials
8. 08\_Evaluations\_Analysis (*Note: To be filled by department chairs and deans*)

Faculty members should upload files in the appropriate location/order.

**Required Printed Materials in File Folder:**

Along with the electronic “box” in SharePoint, faculty members will need to submit one letter size manila file folder to include the following printed materials:

1. Cover Sheet and Checklist
2. Statement of professional accomplishments and summary of professional plans
3. Vita

Once the file folder has been provided to the department, the chair or his/her administrative assistant will add the following documents and then forward to the Deans Office:

1. Peer Observation Report (*this includes the Peer Observer’s Report(s) and the Faculty Member’s Report(s).*)
2. Department CPE Review Committee Memo
3. Department Chair Memo

The Dean’s office will add the following documents to the faculty file folder prior to sending to the Provost’s Office:

1. Dean’s Memo
2. College CPE Review Committee Memo (if applicable)
3. Dean’s Follow-up Memo (if applicable)

## Comprehensive Performance Evaluation Timeline

### Deadlines

All scheduled deadlines will not change. The following timeline indicates key dates and milestones for the CPE process.

March 1	Faculty members will be notified that a CPE will take place in the coming fall semester
Spring	Faculty members will have access to official CPE folder to begin uploading materials
September 15	CPE materials due (SharePoint folder will no longer be accessible on September 16 <sup>th</sup> or the first workday thereafter)

## Getting Started

### How to Access the *Faculty Review* Folder in SharePoint

There are two ways faculty can access their official *Faculty Review* folder in SharePoint. This folder is separate from the user’s individual account.

*(Note: The Provost website will include various help and support materials, including help guides, online tutorials and library scanning services.)*

1. Faculty will receive an e-mail message in the spring that contains the SharePoint link to their individual review folder.
2. Another way to access their folder is to log in to SharePoint through UTSA's WebMail application and click "SharePoint". Under "search everything" create a user-wide search using the faculty's last name.
  - After logging in, be sure to click the star in the upper right corner to "follow" the site which will bookmark it for easier access later.

### **Scanning Support (Library Services)**

The John Peace Library (JPL) will provide a service to scan documents for UTSA faculty who are undergoing a comprehensive periodic evaluation. Library staff in the Access Services Department will scan textual materials creating PDF format files.

Faculty members may also choose to scan their own documents or have a trusted representative scan their documents using library equipment. Please contact the JPL for more information.

#### **Library Scanning Services**

If the faculty member would like library staff to scan their materials, they will be **required** to fill out a Document Transmittal Form, available on the Provost's CPE website.

The form will require a list of all the materials they would like scanned, including the name the file will be given.

Faculty must provide the appropriate naming convention for all documents in order for the files to maintain the proper structure when moved to an electronic format. Please follow the checklist order located on the Provost's CPE website.

This form is to be printed and submitted to the library staff when dropping off the printed materials.

#### **Documents for Scanning**

UTSA faculty must deliver printed materials to the library in the order that is listed on the Document Transmittal Form.

The library will store faculty printed materials in the secure location during the scanning process; however, faculty should not deliver any sensitive documents to be processed by the library staff.

#### **Completing the Process**

Upon completion, the library will contact faculty and ask them to approve the scanned images. It will be the faculty member's responsibility to check the quality of scanned documents and report any problems of missing pages, etc. to library staff.

Once faculty accepts the job, they will be asked to sign the form to pick up the materials. The faculty member should pick up the printed materials.

## SharePoint Support

### Help Guides for Print (PDF)

Help guides for print are available on the Provost's CPE website.

### Other

OIT Support Services (Help Desk) will also provide SharePoint support at (210) 458-5555 or via e-mail at: [oitconnect@utsa.edu](mailto:oitconnect@utsa.edu)

## Software Access and Document File Types

### myUTSA Apps – free access to software on campus

The [myUTSA Apps](#) application gives you free on-campus access to various popular software applications (such as Microsoft Office 2010 and Adobe Acrobat Professional) to help you manage/edit your files.

To log in to [myUTSA Apps](#), use your UTSA Network ID (abc123) and password.

### Adobe Acrobat Professional for PDF Files

Adobe Acrobat Pro can help with more advanced features for PDF files (such as combine several PDF documents into one).

If you do not have Adobe Acrobat Pro, you may access it for free on campus via the [myUTSA Apps application](#).

### Microsoft Office Documents

The more recent versions of Microsoft Office Word (2007 and 2008 for Mac) allow you to save a document as a PDF. Various resources to learn how to convert MS Office documents to PDF are available on the CPE website.

If you are using an older version of MS Office (such as Office 2003) you may access Office 2010 for free on campus via the [myUTSA Apps application](#).

## Roles and Responsibilities

### Eligible Faculty

1. Familiarize yourself with the Electronic Comprehensive Periodic Evaluation process.
2. Scan proper paper documents – or make arrangements to do so with Library staff during hours of operation/availability. You may also send a trusted representative – such as an assistant – to help scan your materials. (Faculty members are solely responsible for the naming of their documents prior to and after scanning of their documents.)
3. If allowing the Library staff to scan materials, provide means to upload electronic files via a DVD/CD, thumb drive, or email.

4. Upload documents to your official CPE folder in SharePoint. (**Important Note:** The official folder is located in the *Faculty Review* account managed by the Provost Office, not your individual SharePoint account).
5. Follow Electronic CPE guidelines as specified by the Office of the Provost.

#### **UTSA Provost Office**

1. Act as primary liaison for faculty during electronic Comprehensive Periodic Evaluation process.
2. Notify all faculty members of mandatory electronic process.
3. Inform faculty through committee meetings, faculty senate and/or through other means.
4. Update Electronic Comprehensive Periodic Evaluation Guidelines as necessary.
5. Manage the *Faculty Review* SharePoint site, including the change of permissions throughout the Comprehensive Periodic Evaluation process.

#### **UTSA Office of Information Technology**

1. Provide online SharePoint tutorials
2. Create SharePoint documentation in PDF format.
3. Offer technical support through OIT Support Services.

#### **UTSA Library Services**

1. If requested, scan faculty materials to a DVD/CD, thumb drive, or email.
2. Provide assistance to faculty that would like to scan their own documents.
3. Specify scanning process to include security/access control of faculty files.
4. Specify hours of operation and availability.
5. Specify any scope of service of equipment.