

Instructions for Faculty Annual Review and Workload Faculty Directions

<http://provost.utsa.edu/vpafs/dm/>

***This year, you will have 3 steps to complete (you will be notified via a Digital Measures/Watermark email when it is time for you to complete each step):**

1. Submit Faculty Annual Review Information (page 1)
2. Submit Faculty Covid Impact Checklist (page 5)
3. Submit Faculty Acknowledgement and Work Plan (page 6)

When the Workflow process launches, you will be notified via email that you need to complete your Annual Report and Workload Agreement. You can access the Workflow in two ways: through the email which will prompt you to log into Digital Measures or by logging directly into Digital Measures. Please note the Workflow tab will not be visible in the top menu bar when you log into Digital Measures until Workflow launches.

1. Log in to Digital Measures by following the link and clicking on the orange box to log in: <http://provost.utsa.edu/vpafs/dm/>.
2. Click on the Workflow tab in the top menu bar.



Workflow

3. Access your Workflow (Tasks) inbox.

In your Workflow inbox, you should see your Faculty Annual Review and Workload Agreement listed. Click on the item.

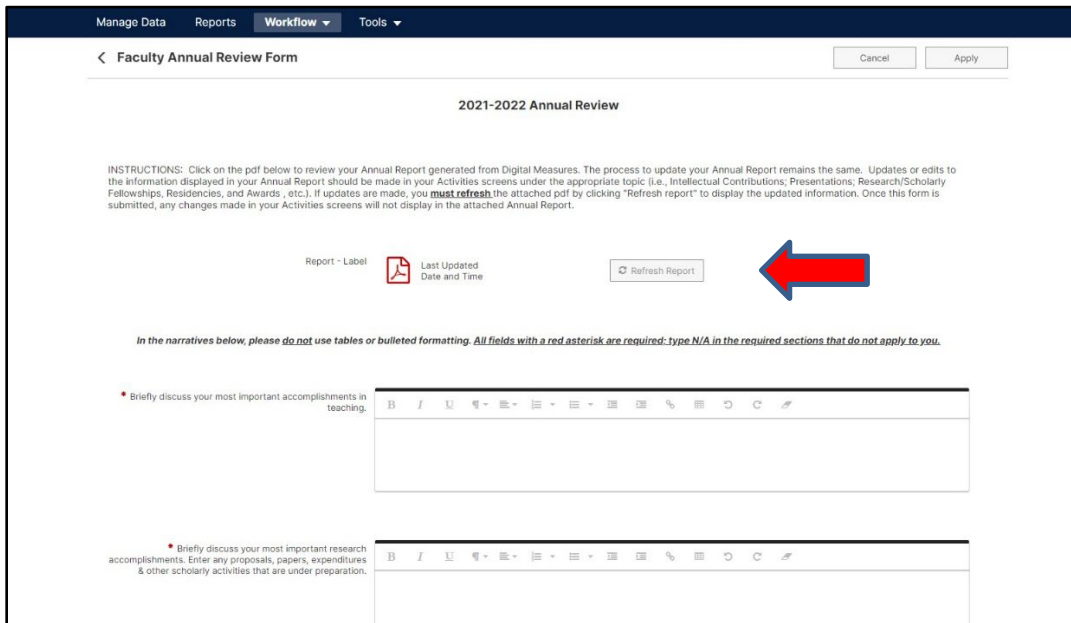
Workflow Tasks			
▼ Inbox			
Name	Step	Subject	Due Date
Faculty Annual Review and Workload	Faculty	Me	Month/Dav/Year

**When viewing the form, you will notice that your workload information for the evaluation period is along with a pdf of your previous workload agreement. This information has been confirmed by your Dean's office.*

4. Scroll down to review the PDF of your Annual Report in your Faculty Form.

On the form, click and review "UTSA Faculty Annual Report" pdf (see screenshot below). This is a custom report generated from Digital Measures and populated with data from the Manage Activities utility. If updates or edits are needed in your Annual Report, navigate to Manage

Activities and correct or revise the data under the appropriate topic (i.e., Intellectual Contributions, Presentations, etc.). Once updates are completed in your Activities screens, return to the Workflow Task where you **MUST REFRESH** your Faculty Annual Report PDF in order for it to display the new information. Note that changes can only be made to your Faculty Annual Report (not your previous Workload Agreement).




Manage Data Reports Workflow Tools

Faculty Annual Review Form

2021-2022 Annual Review

INSTRUCTIONS: Click on the pdf below to review your Annual Report generated from Digital Measures. The process to update your Annual Report remains the same. Updates or edits to the information displayed in your Annual Report should be made in your Activities screens under the appropriate topic (i.e., Intellectual Contributions; Presentations; Research/Scholarly Fellowships, Residencies, and Awards, etc.). If updates are made, you **must refresh** the attached pdf by clicking "Refresh report" to display the updated information. Once this form is submitted, any changes made in your Activities screens will not display in the attached Annual Report.

Report - Label  Last Updated Date and Time

In the narratives below, please do not use tables or bulleted formatting. All fields with a red asterisk are required; type N/A in the required sections that do not apply to you.

* Briefly discuss your most important accomplishments in teaching.

* Briefly discuss your most important research accomplishments. Enter any proposals, papers, expenditures & other scholarly activities that are under preparation.

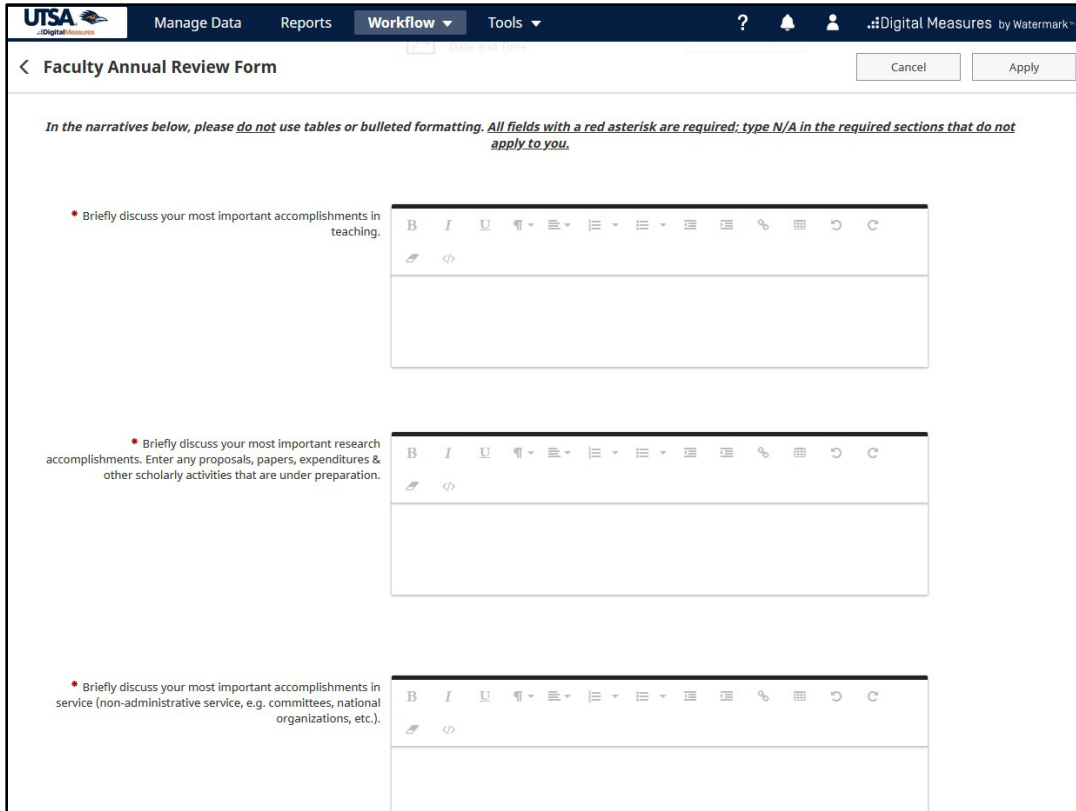
5. Evaluate your accomplishments in teaching, research, service and administration.

Fill in the relevant information in the text boxes displayed in the form. If an activity does not apply to you based on your workload assignment, type N/A in the text box.

Saving your work

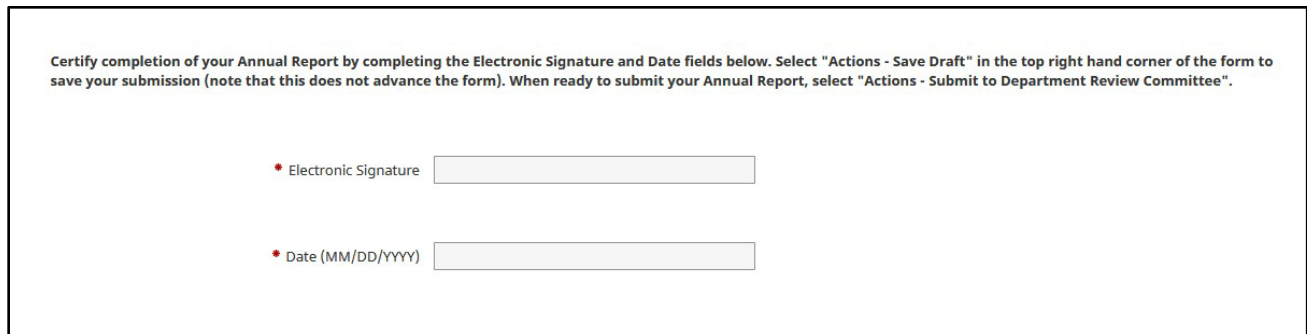
You can click the "Actions - Save Draft" button while editing to save your work and return to continue editing at a later date. Note that this does not advance your evaluation to the next step.

**The red asterisks indicate mandatory items/fields within the form (where applicable). You will be unable to submit the form until these items are completed. If a required item does not apply to you, please enter "N/A."*



6. Sign/date the form.

Type your full name in upper and lower case letters (no initials). Enter date in appropriate format (MM/DD/YYYY).



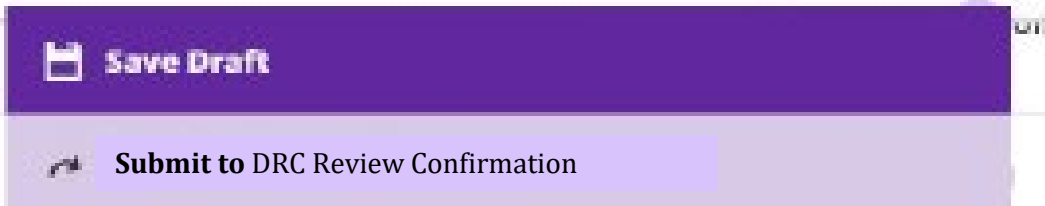
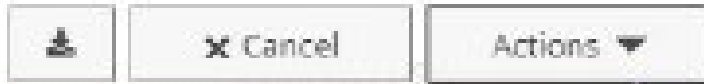
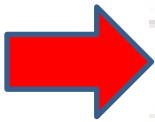
7. Save your information (optional)

*Download and save a copy of your annual review before submitting.

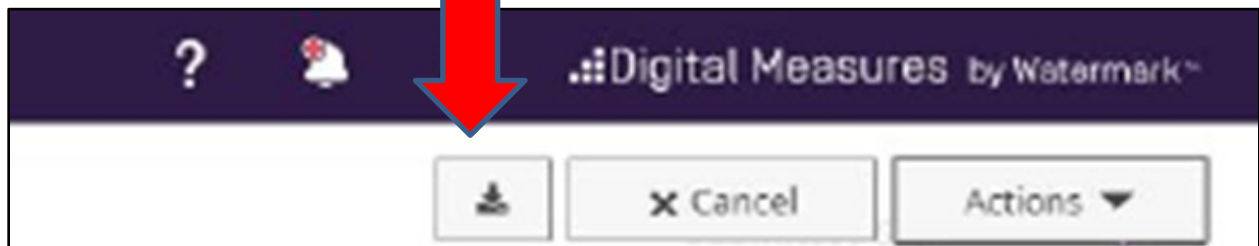
- Click **“Actions – Save Draft”**
- Click the **download button** (see below) - a zip file will open and you can save the documents to your computer.



Save



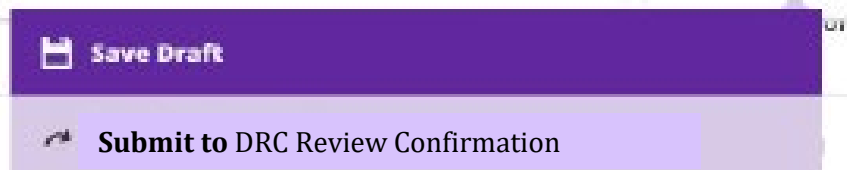
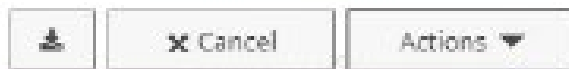
Download



THE FOLLOWING STEP MUST BE COMPLETED TO ADVANCE YOUR SUBMISSION.

8. Submit

Click the “**ACTIONS – Submit to DRC Review Confirmation**” button in the upper right corner of your screen.



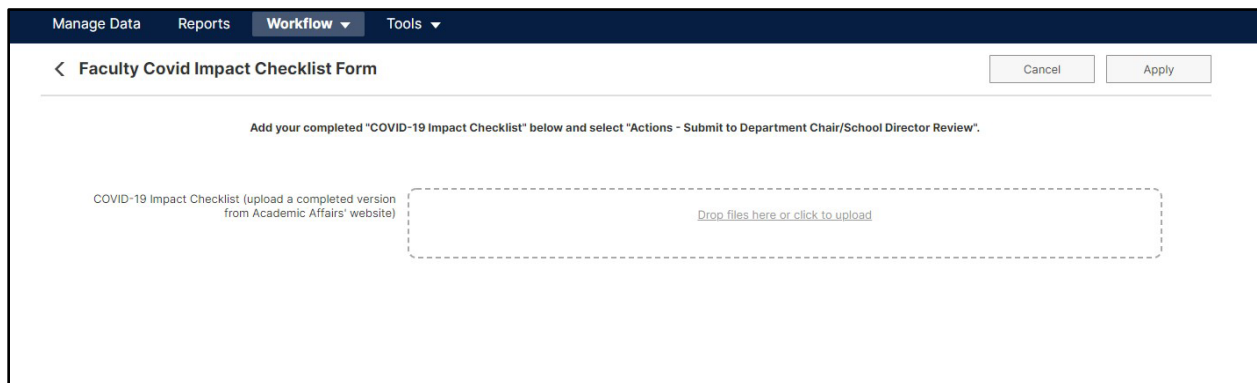
Submit

After you click Submit, you will see a pop-up window asking you to confirm the action. Click “Yes” and your Workflow task will move to the next step in the process (Department Review Committee/DRC Review Confirmation).

If applicable, the Department Review Committee will review your submitted materials. After the DRC review (or if the DRC review is skipped), the form will be sent back to you as part of the workflow to upload your ‘Faculty Covid Impact Checklist’.

NEW STEP – Faculty Covid Impact Checklist:

1. Upload a copy of your completed Faculty Covid Impact Checklist (A blank checklist can be found on Academic Affairs webpage). Select “Actions – Save Draft” and then “Actions – Submit to Department Chair/School Director Review”.



The screenshot shows a web interface for the 'Faculty Covid Impact Checklist Form'. At the top, there are navigation tabs: 'Manage Data', 'Reports', 'Workflow' (selected), and 'Tools'. Below the tabs, the page title is '< Faculty Covid Impact Checklist Form' with 'Cancel' and 'Apply' buttons on the right. The main content area contains the instruction: 'Add your completed "COVID-19 Impact Checklist" below and select "Actions - Submit to Department Chair/School Director Review".' Below this instruction, there is a label 'COVID-19 Impact Checklist (upload a completed version from Academic Affairs' website)' and a dashed rectangular box for file upload. Inside the box, the text 'Drop files here or click to upload' is visible.

The Department Chair/School Director will review your submitted materials. After that review, the form will be sent back to you as part of the workflow to complete your ‘Faculty Acknowledgement and Work Plan’.

NEW STEP – Faculty Acknowledgement and Work Plan:

1. Faculty Acknowledgement and Work Plan

Fill in your optional comments and plan of work.

Faculty Acknowledgement and Work Plan

Please do not use tables or bulleted formatting when completing this section.

Optional Faculty Comments to Annual Review: (These comments should not be used in place of formal grievance processes.)

B I U

Optional Faculty Comments to Workload Plan:

B I U

PLAN OF WORK FOR ACADEMIC YEAR 2023-24

Itemize and describe teaching, research, service, and/or administrative deliverables for the 2022-23 academic year. The plan of work should describe no less than the activities needed to "meet minimum requirements" of the departmental and college workload policy. **All fields with a red asterisk are required: type N/A in the required sections that do not apply to you.**

In the narratives below, please do not use tables or bulleted formatting.

Teaching: Items may include course(s), instructional development activities, instruction grants, teaching awards, students mentored/advised, peer observation.

* Teaching AY 23-24

B I U

Research: Items may include but are not limited to scholarly products, publications, projects, artwork, recordings, and any work under review or in preparation; grant proposals including any under review or in preparation; intellectual property under review or in preparation as well as integrative and applied forms of scholarship that involve cross-cutting collaborations with business and community partners, including translational research, commercialization activities, and patents.

* Research AY 23-24

B I U

2. Sign/date the form.

Type your full name in upper and lower case letters (no initials). Enter date in appropriate format (MM/DD/YYYY).

Faculty Signature of Acknowledgement

Certify completion of your Acknowledgement and Work Plan by completing the Electronic Signature and Date fields below. Select "Actions - Save Draft" in the top right hand corner of the form to save your submission (note that this does not advance the form). When ready to submit the form, select "Actions - Submit to Department Chair/School Director Approval".

Your signature does not necessarily signify agreement with the evaluation. It simply acknowledges that you have met with your department chair and that the evaluation and your AY 23-24 workload have been discussed with you per HOP 2.11.

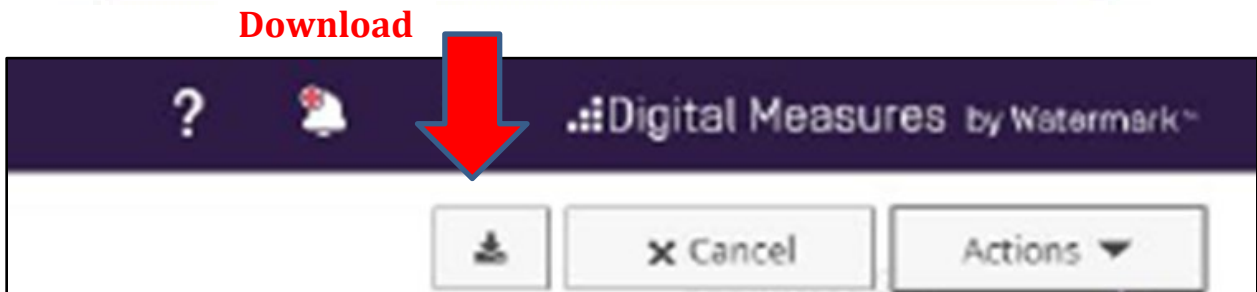
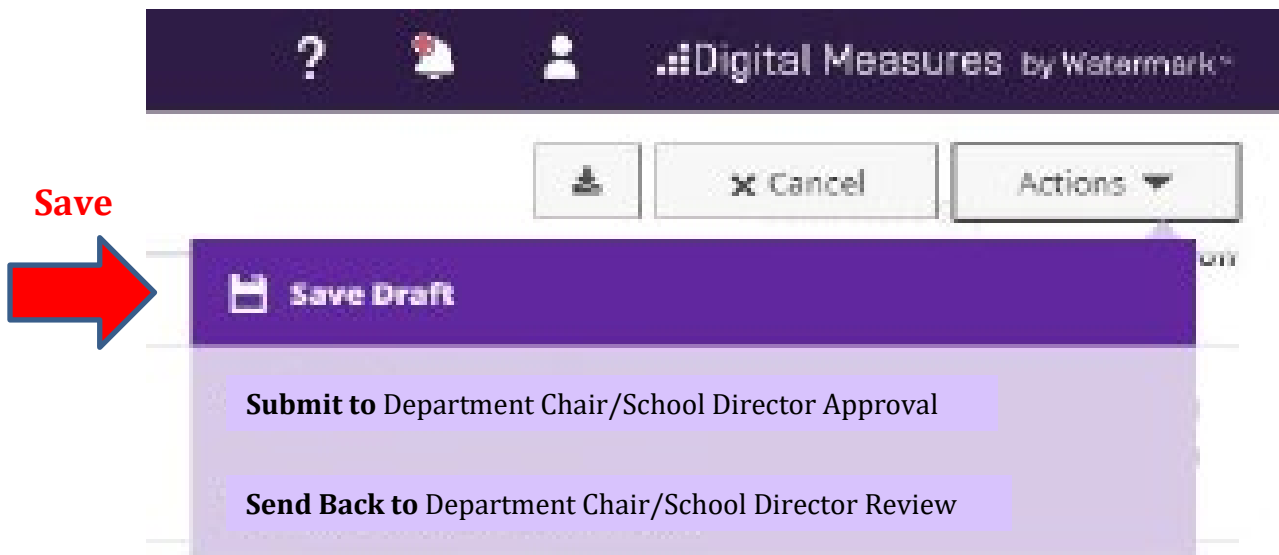
• Electronic Signature

• Date (MM/DD/YYYY)

3. Save your information (optional)

*Download and save a copy of your work plan before submitting.

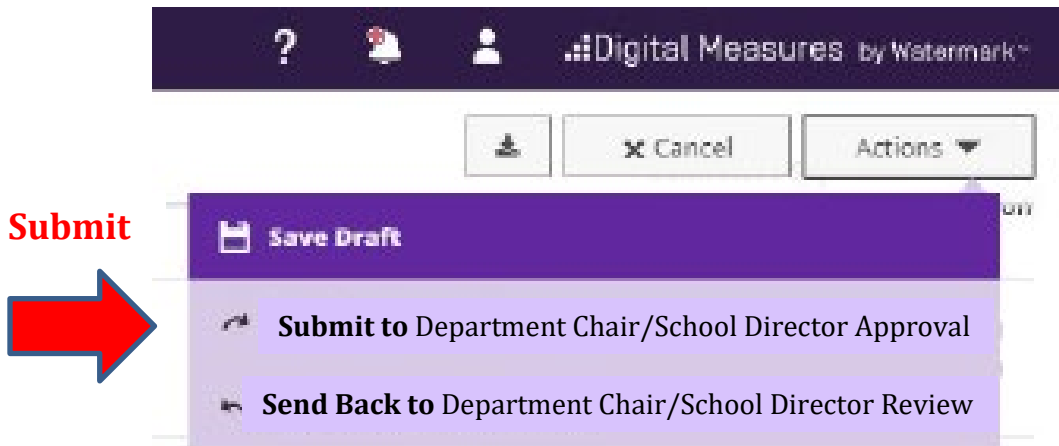
- Click **"Actions – Save Draft"**
- Click the **download button** (see below) - a zip file will open and you can save the documents to your computer.



THE FOLLOWING STEP MUST BE COMPLETED TO ADVANCE YOUR SUBMISSION.

4. Submit

Click the “**ACTIONS – Submit to Department Chair/School Director Approval**” button in the upper right corner of your screen.



After you click Submit, you will see a pop-up window asking you to confirm the action. Click “Yes” and your documents will move to the next step in the process (Department Chair/School Director Approval).

Reviewing the Status of a Workflow Submission

After you submit your materials to be reviewed, the task will move from your Workflow inbox to the History section. Here, you can check the status of your submission. After the entire process is completed, your workload agreement information and evaluation will be uploaded to Digital Measures for future reference.