UDAcademe: Annual Appraisal Dossier Preparation Guide (Draft 1/17/2018)

Index of Topics

The Annual Appraisal Process

UD Annual Appraisals are implemented in the UDAcademe system. UDAcademe is an online faculty activity reporting system. The system provides a single convenient place for you to archive your achievements, including data about teaching, research, and service activities reported as part of your annual review process.

This will include The Appraisal process; how to prepare the Annual Review and Planning Report; how to preview the Review and Planning Report; how to complete, save, and submit the Review and Planning Report; how to edit your Report if needed following your meeting with your Department Chair; and how to respond to the Chairperson's review.

As defined in the UD Faculty Handbook, the appraisal process is a three step process in which:

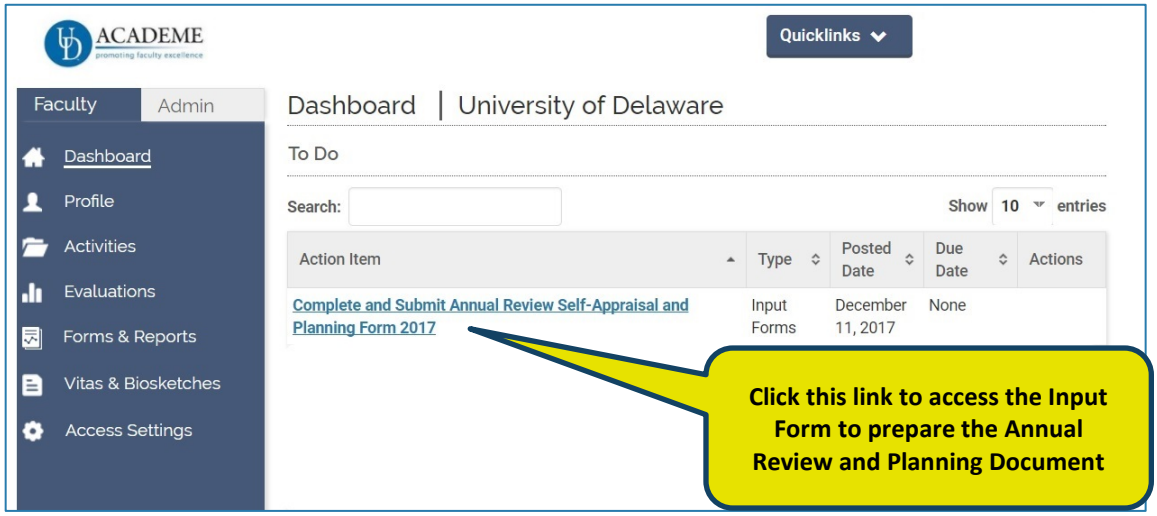
1. the faculty member prepares and submits their self-appraisal and planning report,
2. the Department Chairperson conducts an in-person interview and prepares the evaluation, and
3. the faculty member signs off indicating that the evaluation has been discussed with their Chair.

The evaluation period is the 12 months since the last review. This is typically Spring through Fall (or Winter).

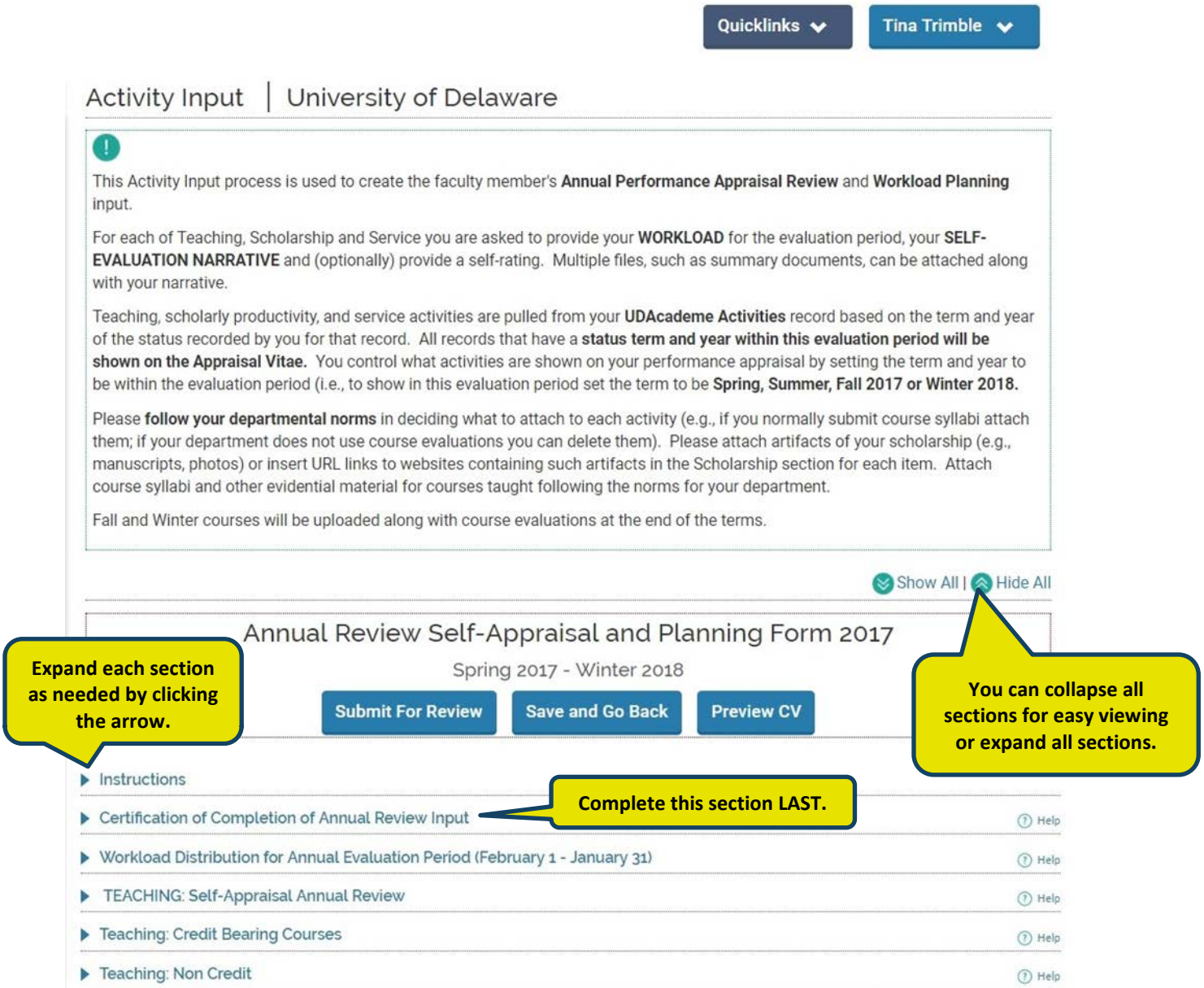
Department Chairs are encouraged to set a deadline for their faculty to submit their input which allows adequate time for in-person meetings and completion of the review for all faculty in their department no later than March 31.

Input and Select Material for Annual Review and Complete Planning Form

Prior to the Appraisal period you will receive a notice on your UDAcademe Dashboard to Complete the Activity Input form for the period covered by the appraisal. There will be a link: "Complete and Submit Annual Review Self-Appraisal and Planning Form 2017." Click on this link to start the process.



The Input form for the annual review and planning document looks like this. Please read the information at the top of the form carefully. The form has multiple sections you need to update or complete. You can collapse or reveal all sections for ease of review.
Please wait until you have prepared and previewed all sections, and then complete the "Certification" last, just prior to submitting for review.



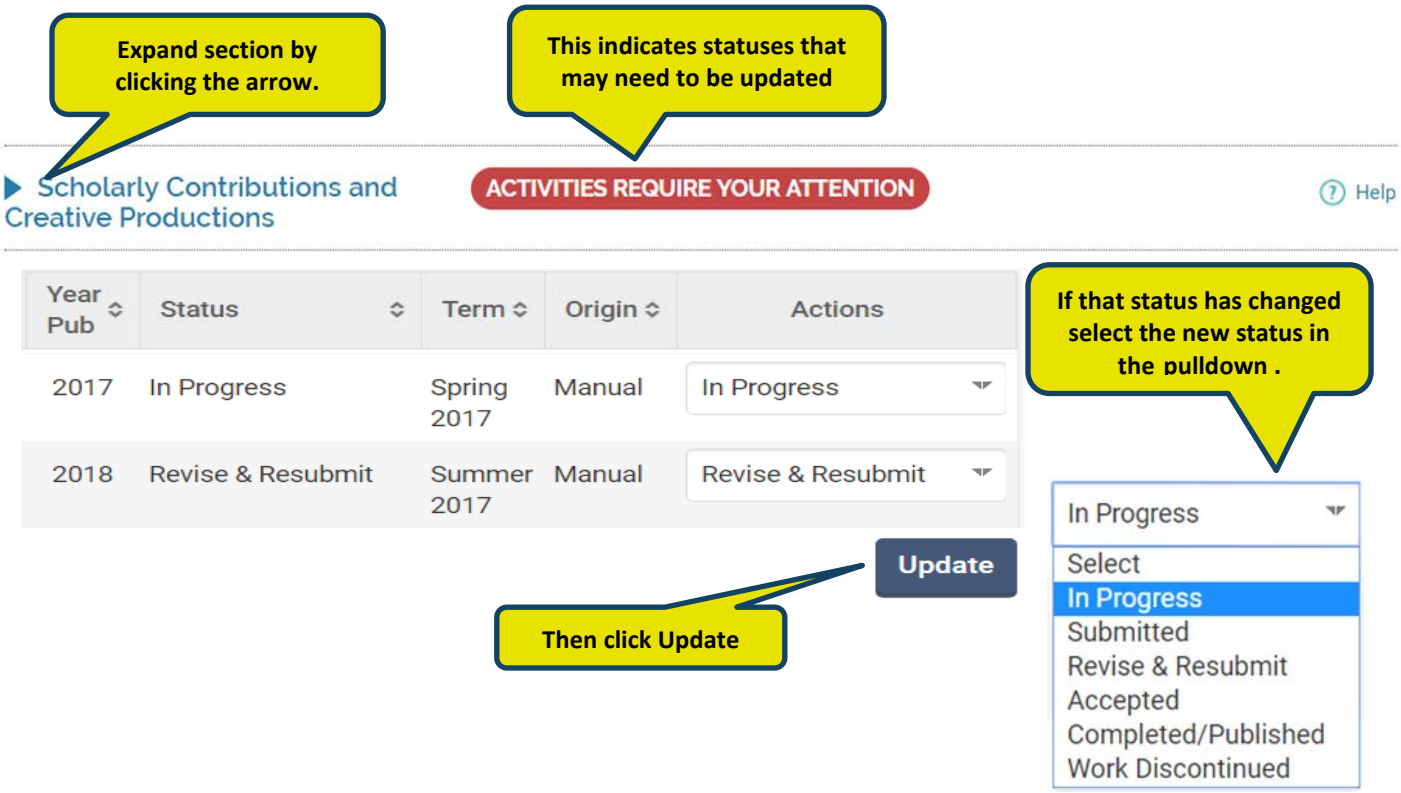
Click on the arrow on the left of each entry to expand an individual section.

Please wait until you have prepared and previewed all sections, and then complete the "Certification" last, just prior to submitting for review.

The Help Icons on the right provide information about each section. You can save the form and return to your work at a later time. You can preview the report at any time.
The sections highlighted here [in green] are unique to this appraisal. Complete them here.
The sections highlighted here [in yellow] are pulled from your Activities if the status term is within the evaluation period.
Assure that your most up-to-date CV is attached here [highlighted in blue].
The last form you should complete [highlighted in red]. Do this after you have previewed your report, but before you submit it.

Updating Activity Status:

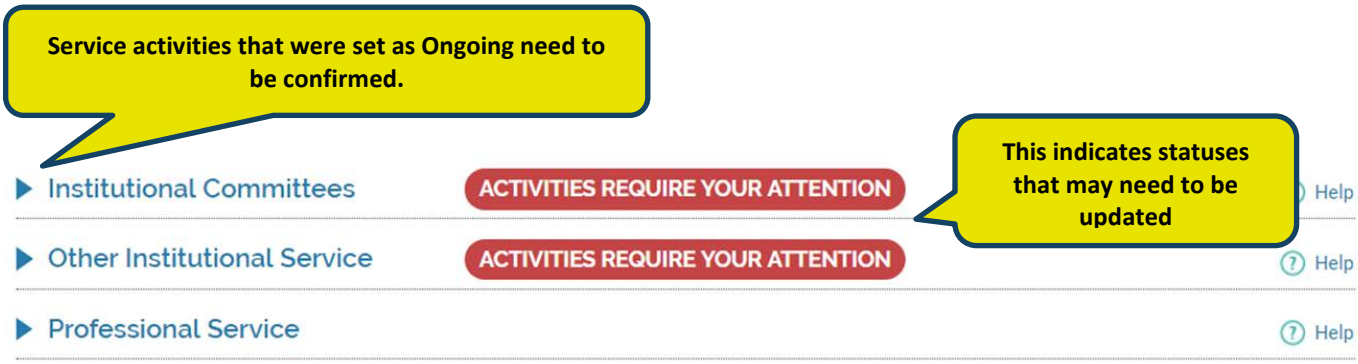
You may notice that some sections of the form are marked with "Activities that Require your Attention." This indicates statuses that may need to be updated. Expand the section to reveal the activity list.

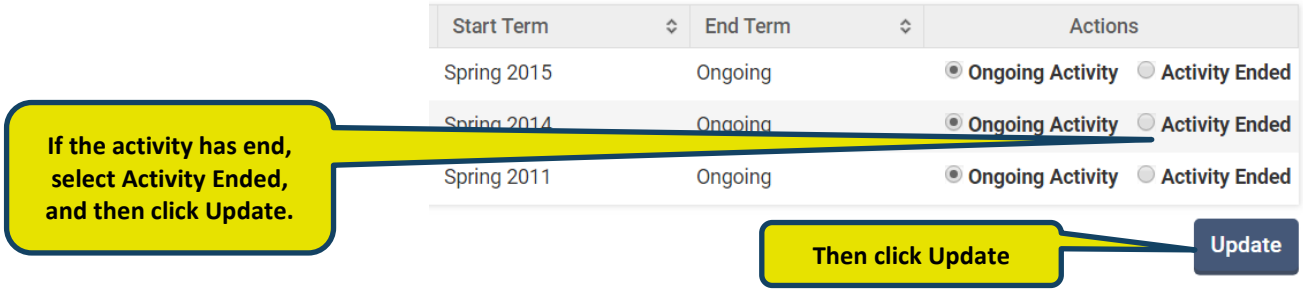


If the status of some activities have changed, select the new statuses in the pulldown for each item that should have a new status and then click "Update."

Updating Service Activities:

You may notice that some sections of the form are marked with "Activities that Require your Attention." This indicates statuses that may need to be updated. Expand the section to reveal the activity list.



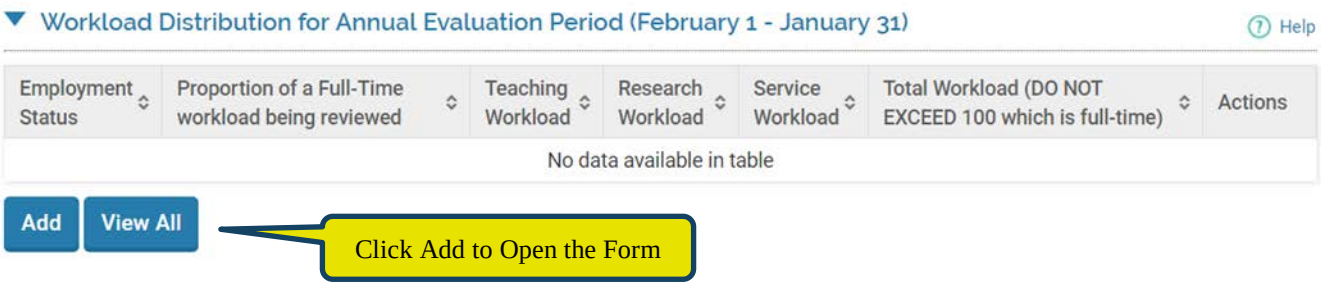


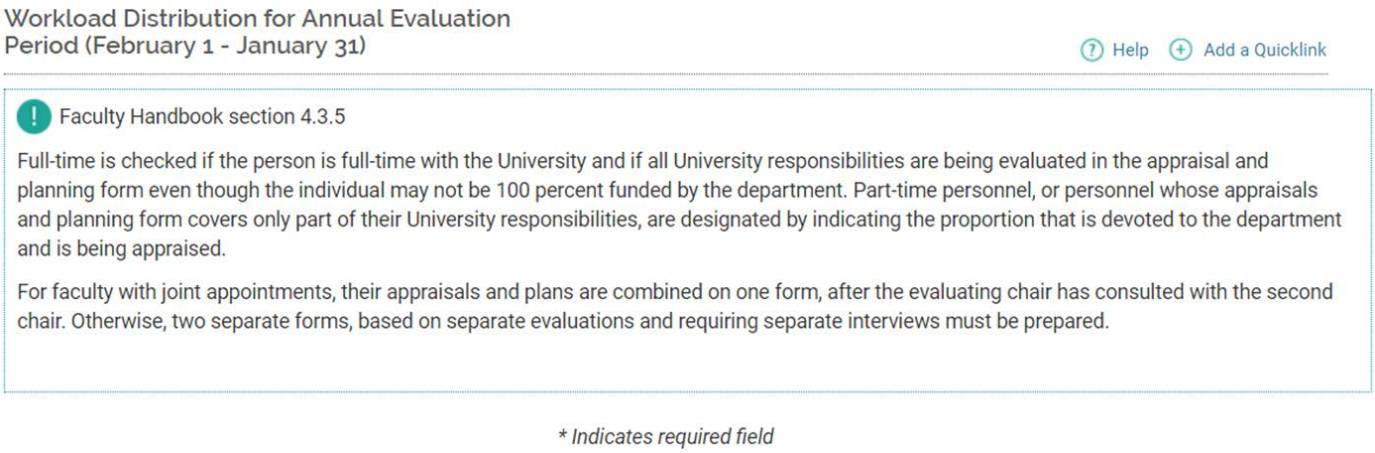
If the status of some activities have changed, select the new statuses in the pulldown for each item that should have a new status and then click “Update.”

Service activities that had been set as ongoing will need to be updated or confirmed. Leave the radio button for “Ongoing” selected if the activity is still ongoing, or select the “Activity Ended” if it has ended. Then click “Update.”

Workload Distribution for Evaluation Period:

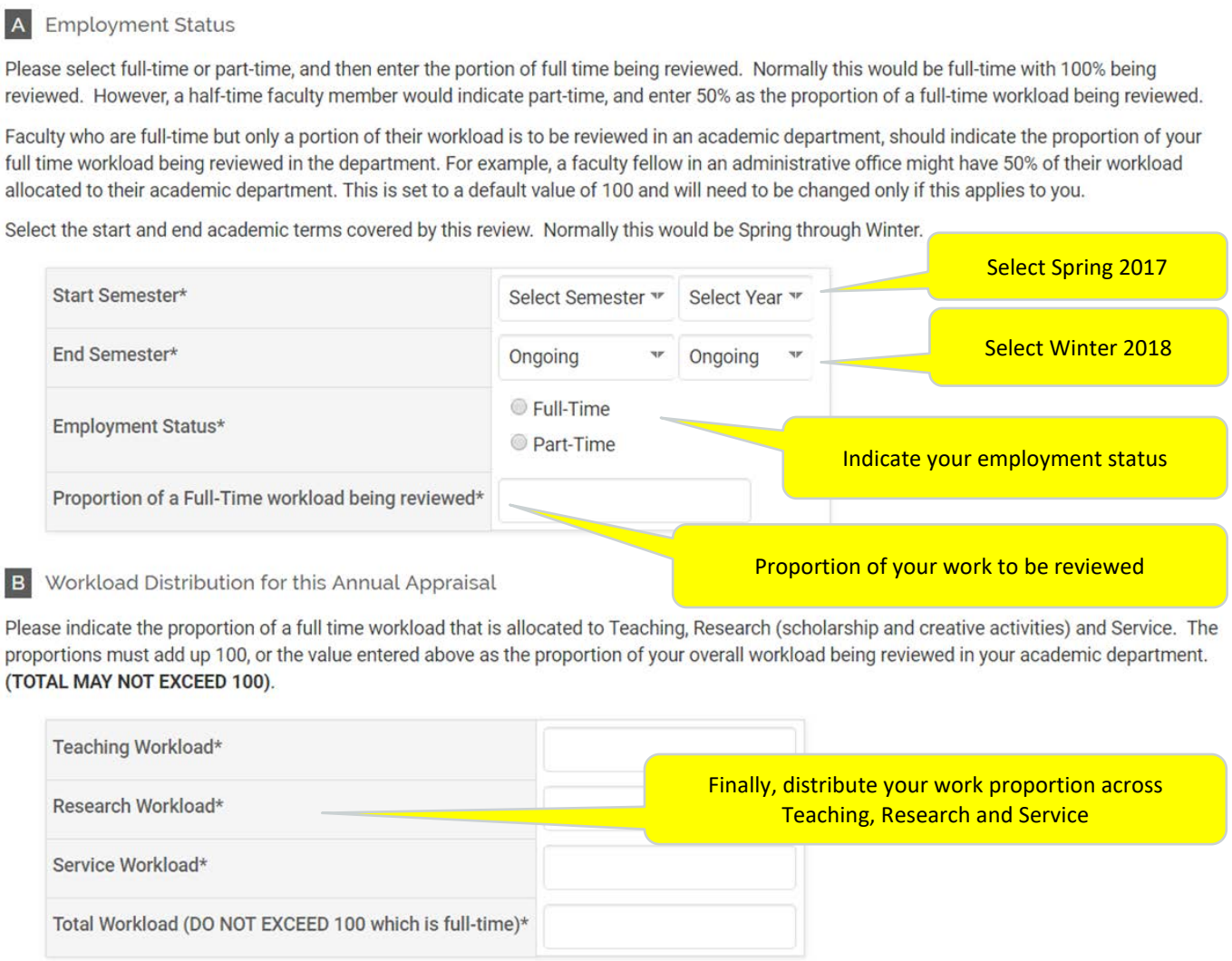
You MUST provide your workload distribution across teaching, research and service for the evaluation period. Click “Add” to open the form. First carefully read the onscreen instructions. Then scroll down to view and complete the form.





Select the beginning and end term of the evaluation period. Normally this is Spring through Winter.

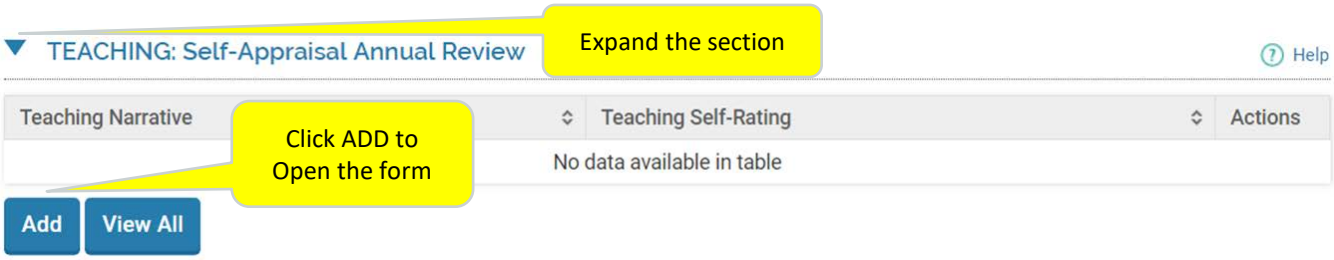
Indicate your employment status with respect to your academic department appointment. See the instructions at the top of the form for details. Also indicate your work time associated with this department. For full-time employees this is 100%, but may be less if a portion of your full-time duties are assigned to professional activities outside the academic department. Then type the proportion of your work to be reviewed with the academic department. Finally, distribute your work proportion across Teaching, Research and Service.



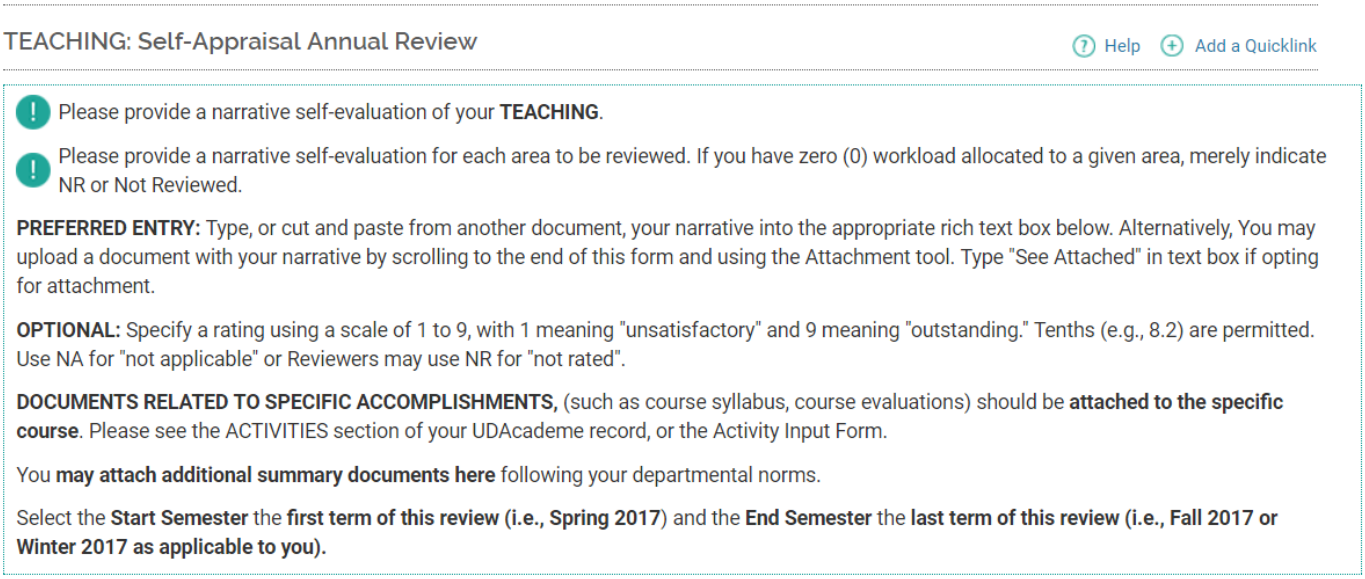
Click “Save and Go Back” to return to the Input form.

Teaching Self-Evaluation

Self Evaluation is at the core of the annual appraisal process. If the section is not already expanded, click the arrow to expand the section. Then, click “Add” to open the form.



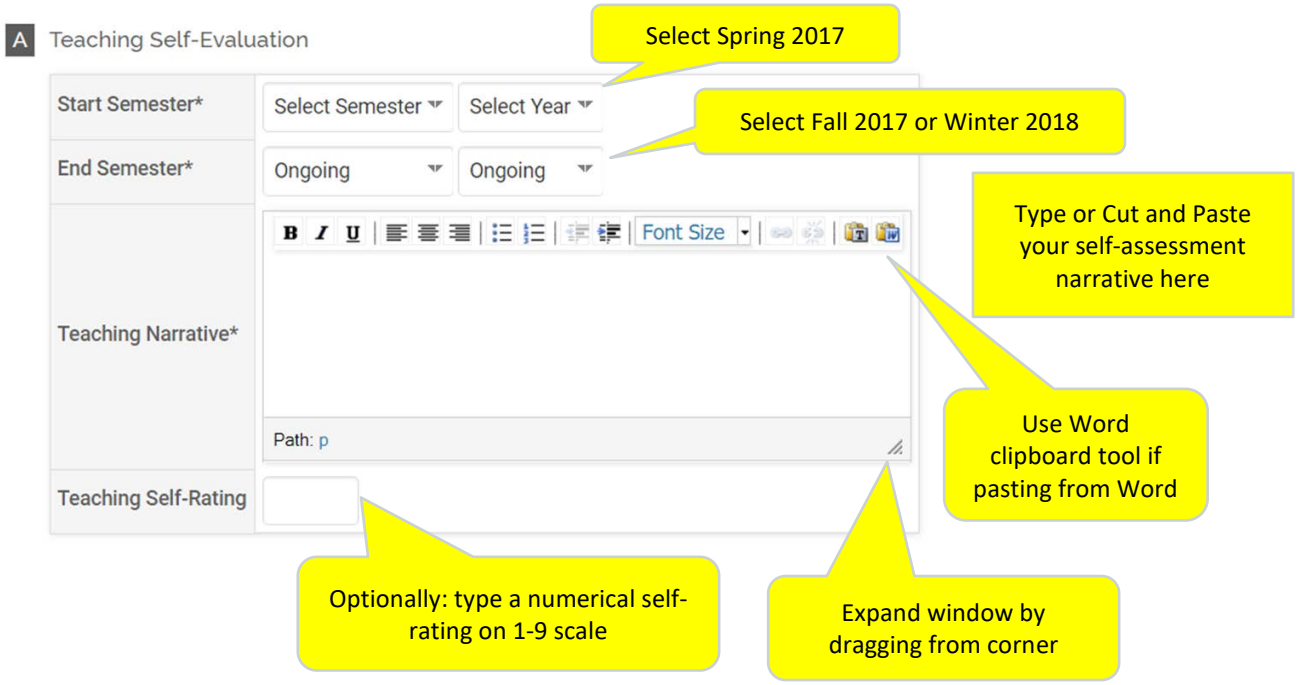
Carefully read the on-screen instructions. Then scroll down to Section A of the form.



In Section A, first select the period of the review. Annual reviews typically begin with the Spring semester and go through the Fall or Winter term.

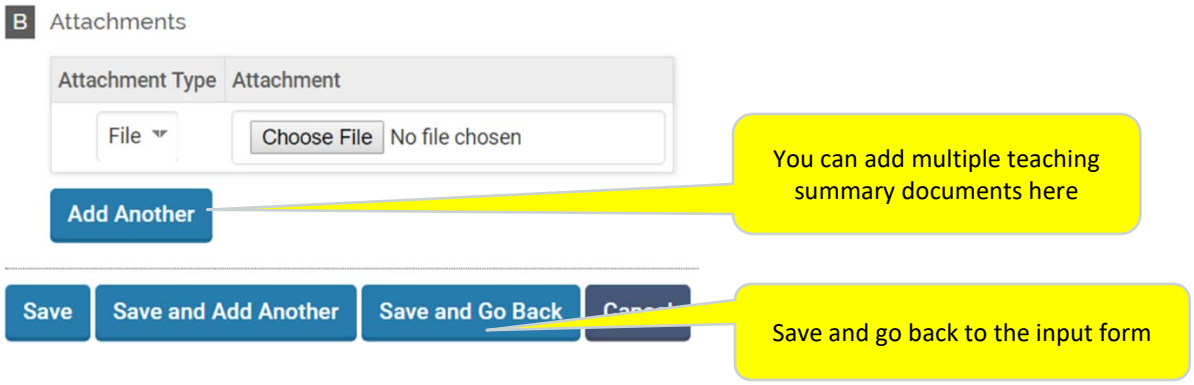
Type or cut and paste your self-assessment into the rich text box. If pasting from Word use the Word Clipboard, which preserves your formatting. You can expand the size of the rich text box for ease of editing by dragging the bottom right corner.

It is optional to provide a self-rating score. You can type a number from 1-9, with 1 meaning unsatisfactory to 9 meaning excellent, or type NA for not-applicable, or NR for not-rated.



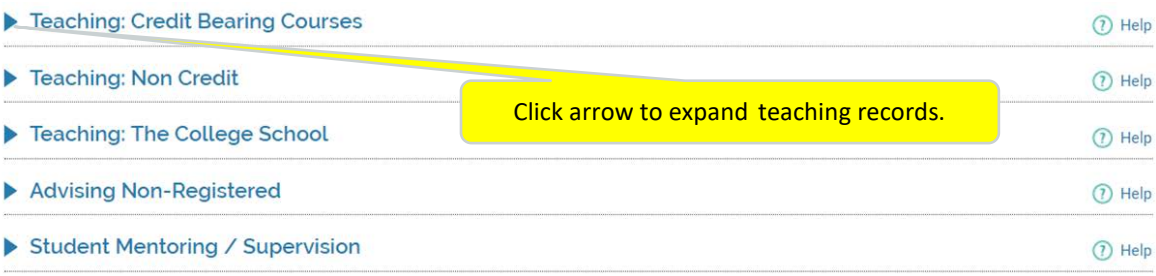
In section B, you can add multiple teaching summary documents such as a summary of your course evaluations.

Click “Save and Go Back” to go back to the Input form.



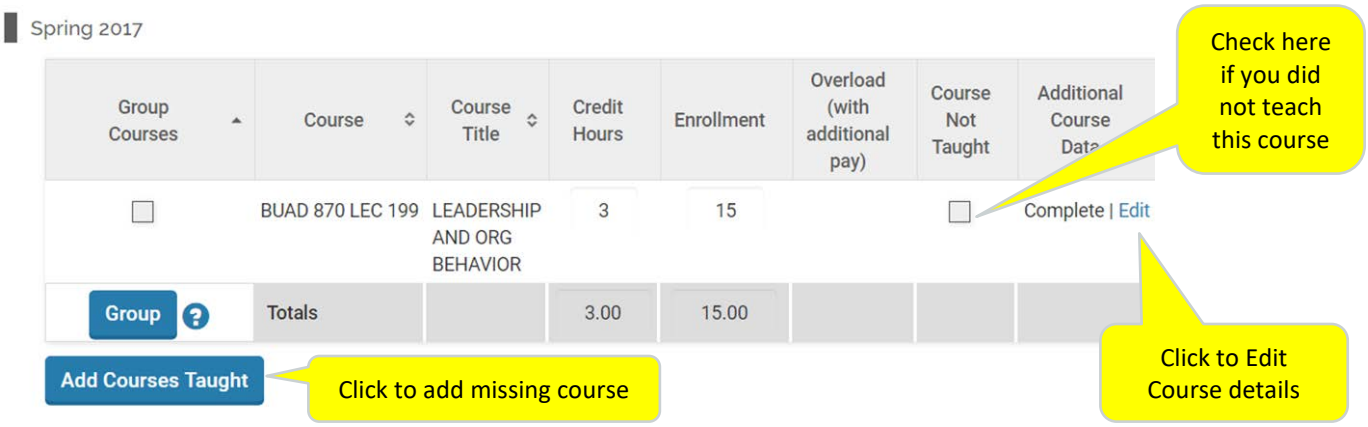
Update Teaching Activities

Check your teaching records and attach syllabi and other evidence that is typical for evaluations in your department



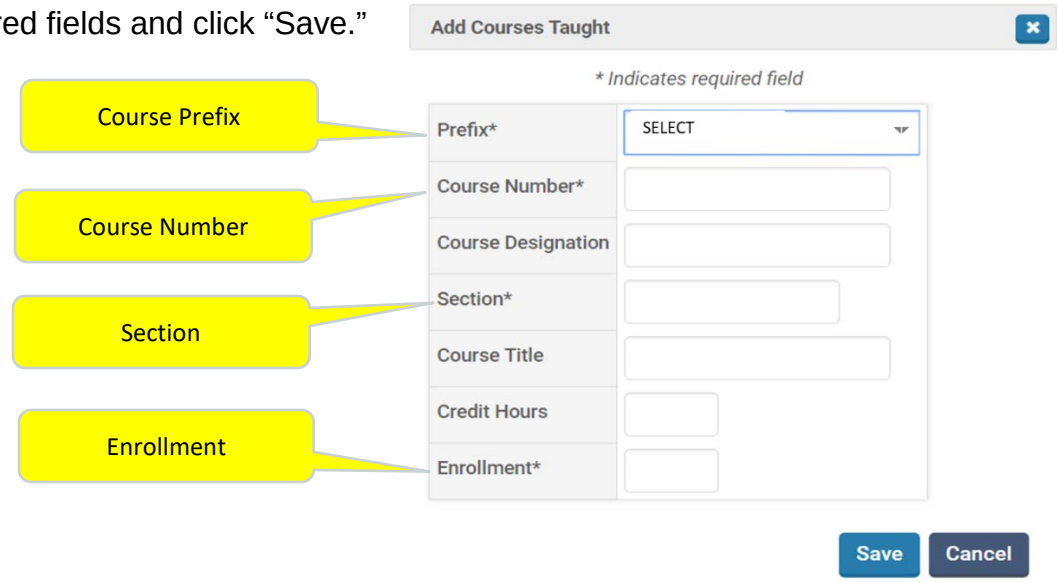
Review your Teaching and Attachments

Review your Teaching. Courses taught are loaded from UDSIS at the end of each term. Fall courses will be loaded the last week of December.
Click "Edit" under "Additional Course Data" to classify the course. For example, if you taught the course on overload, you will find a place in that classification window to indicate that. If you did not actually teach a course listed, check the "Course Not Taught" box. If a course is missing, click "Add Courses Taught" to open a window in which you can enter course information.



If a course is missing, click "Add Courses Taught" to open a window in which you can enter course information. You will need to complete the required fields including Course Prefix and Number, Section, and Enrollment.

Complete all required fields and click “Save.”



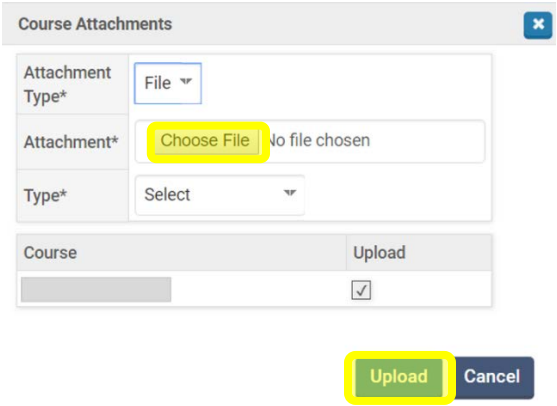
PLEASE NOTE: If your entry is not consistent with the course catalog (e.g., you indicate a course is DISC when it is in the catalogue as LEC then you will get an error.

Add Attachments for Each Course

Add attachments for each course. Follow your department norms. If reviews typically require syllabi, course evaluations, or other documentation, attach them here by clicking the “Add” button.

Choose file from your computer and then select the type of file. Then upload the file. Repeat for any additional files.

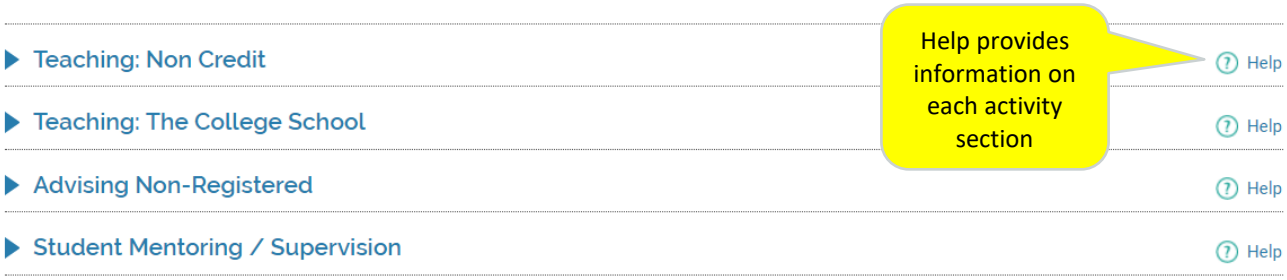
The advantage of attaching documents here is that they will be here for subsequent reviews such as Contract Renewal or P&T and will be available to program accreditation reports as appropriate to your discipline.



Complete Teaching and Student Related Activities as Apply

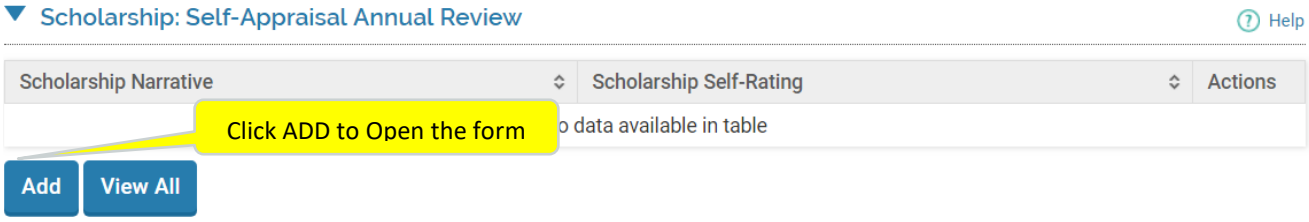
These teaching and student related sections may or may not apply to you. If there is no content in a section during the appraisal period, the section does not show on your Appraisal Report.

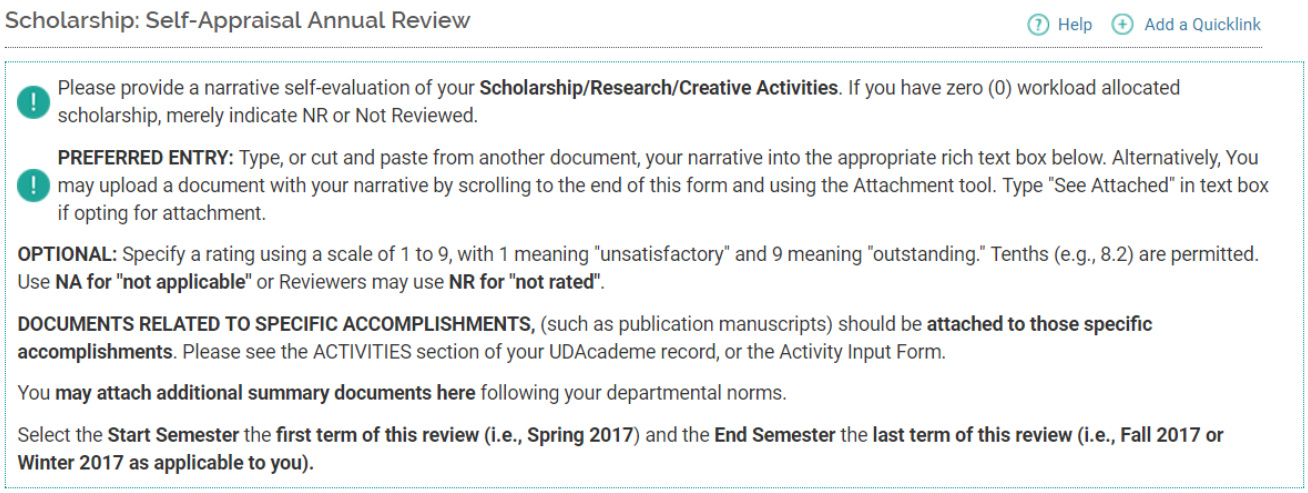
Update all applicable sections following the directions provided in the help content for that section.



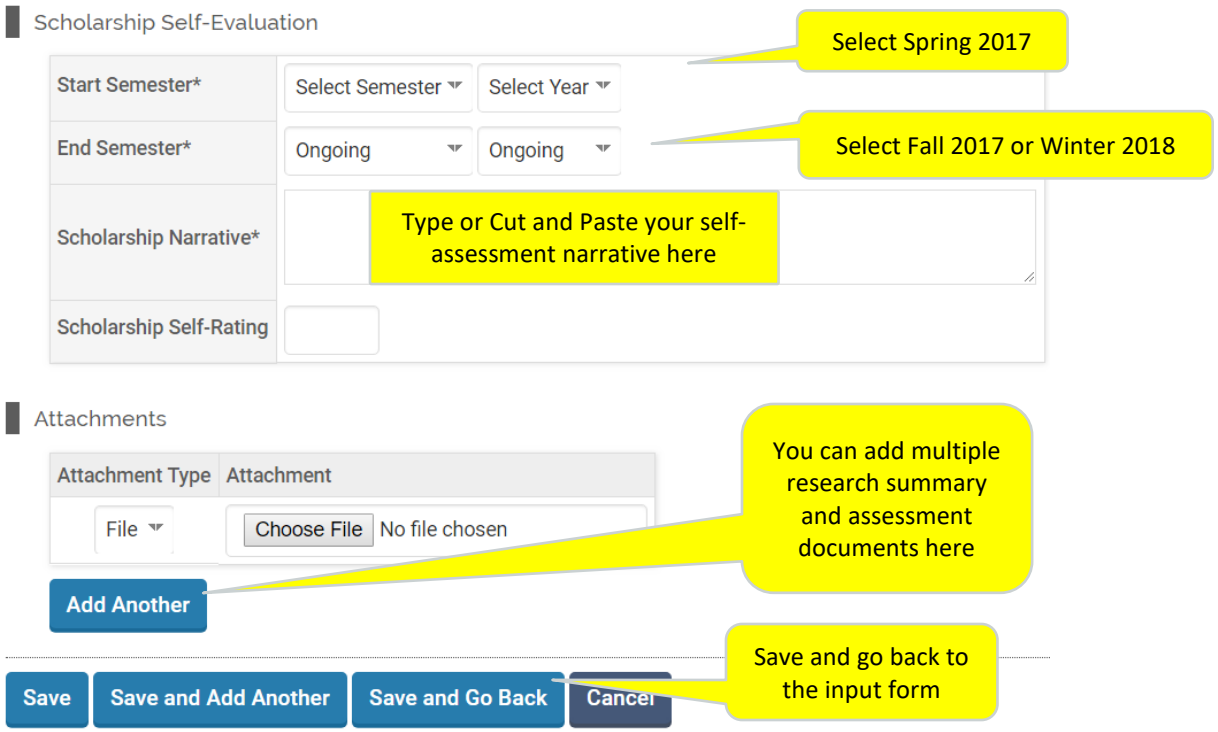
Research Self-Evaluation

The self-evaluation for Research and Creative Accomplishments works the same as the Teaching self-evaluation. Click the "Add" button to open the form.





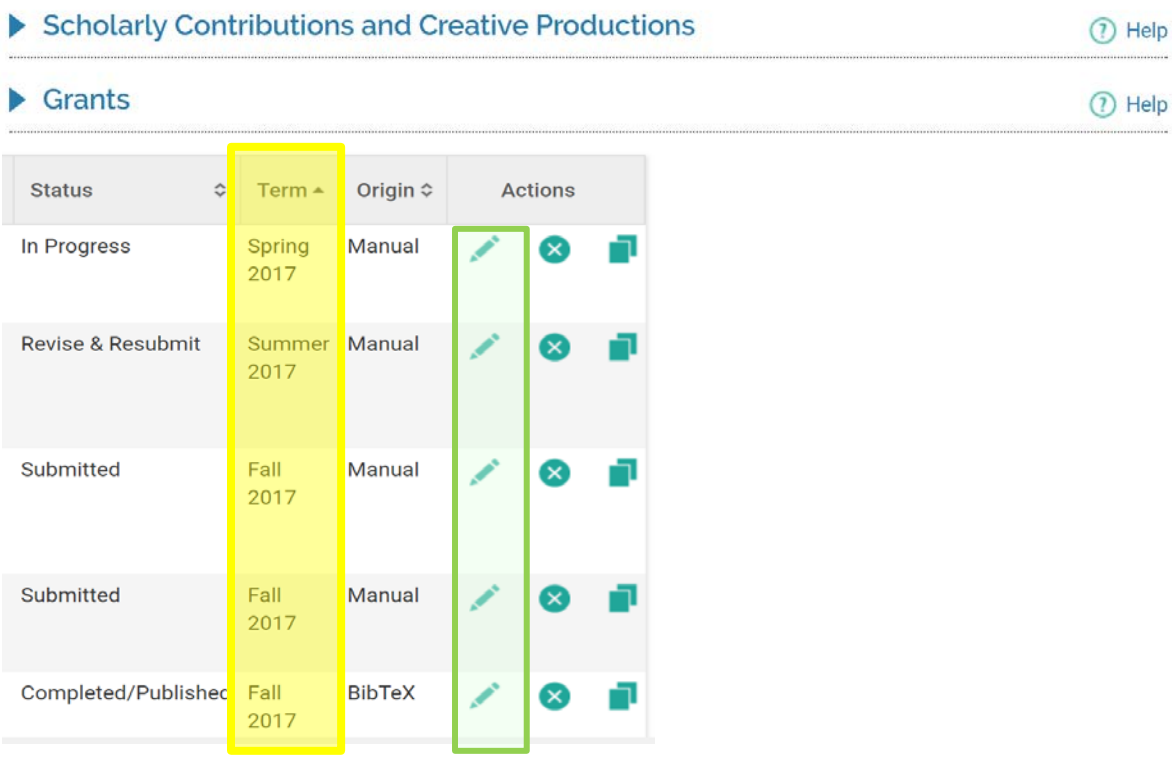
Scroll down to complete the evaluation sections in the same way that you did for your teaching evaluation. Select the start and end terms being evaluated. Enter your scholarship self-appraisal narrative and attach summary and assessment documents as specified in your department norms.



Save and return to the Input form.

Update Scholarship, Creative Productions & Grant Activities

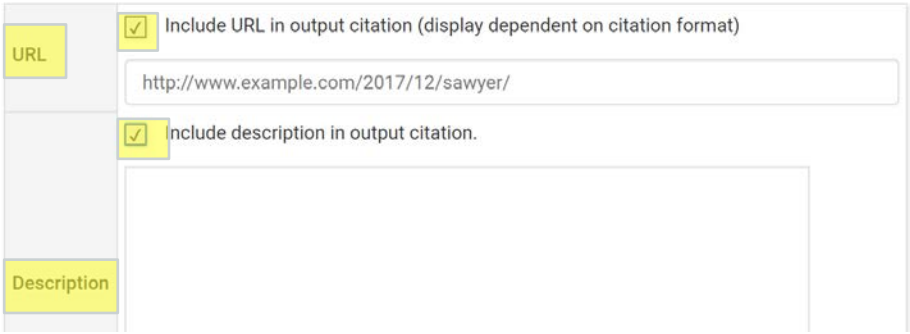
When editing Scholarly Contributions, Creative Productions, and Grants, only material that has a term and year within the evaluation period will show in the evaluation report. You can edit any item using the edit icons to manage the status.



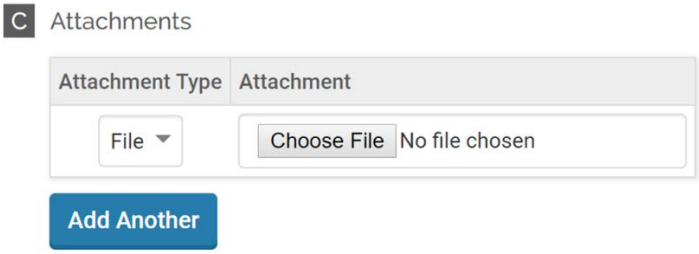
In the input form, click “Manage Status” to update status and/or status term and year.

More Scholarship Details

You can include a url, or type or paste a description in the Description box. Check the “Include” box to have this revealed on your appraisal document.

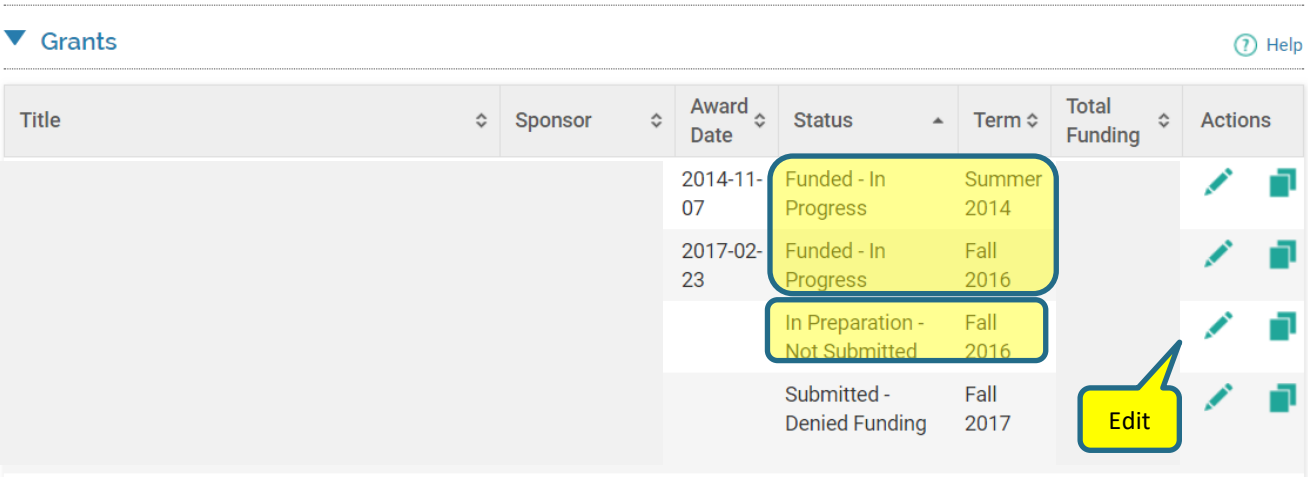


Add one or more attachments, including a pdf of the manuscript or an image of a creative accomplishment.

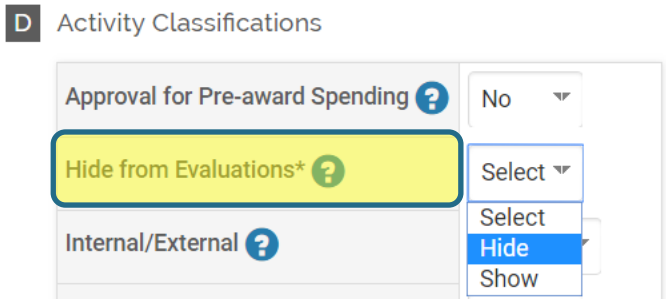


Grants and Contracts

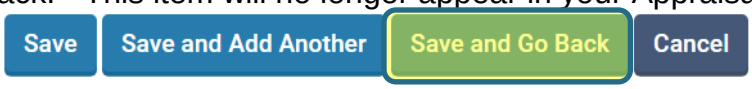
Grants that have an ongoing status such as “Funded in Progress” have a term and a year of the date funded and will show on the report regardless of the term and year.



You may not want records that have an ongoing status such as “In Preparation – Not Submitted” to show on your appraisal. You can hide this record from your report by editing it and scrolling down to section D “Activity Classification” and then select “Hide” in the “Hide from Evaluations.”

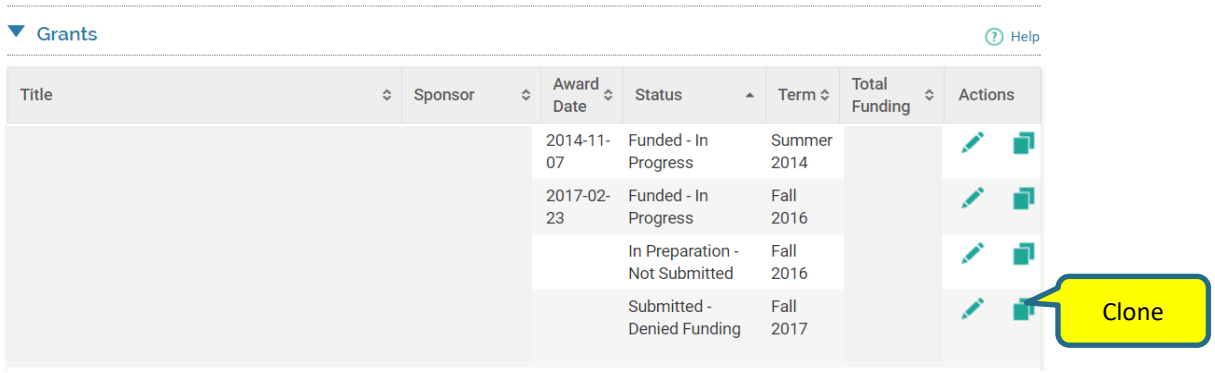


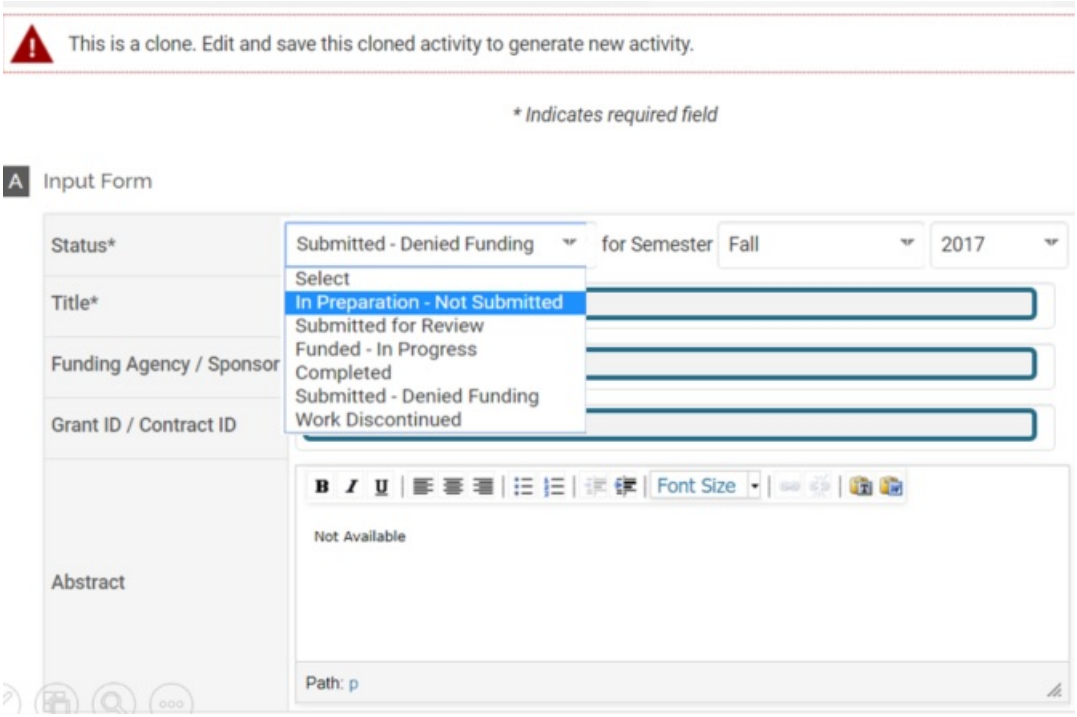
Click “Save and Go Back.” This item will no longer appear in your Appraisal Report.



Changing Grants Records

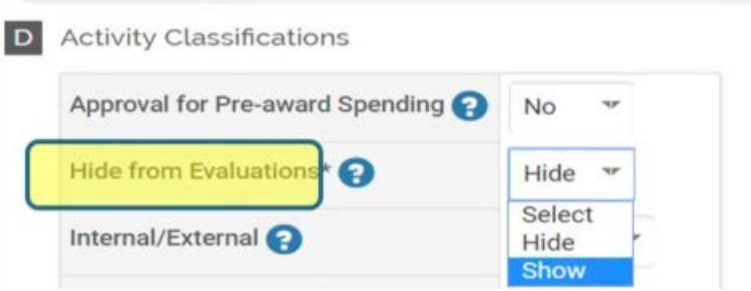
If there is a record that you need to have shown on your dossier, but need to change some information in the record, you can clone the record, make the modifications, and then save it. Click the clone button to create the clone.





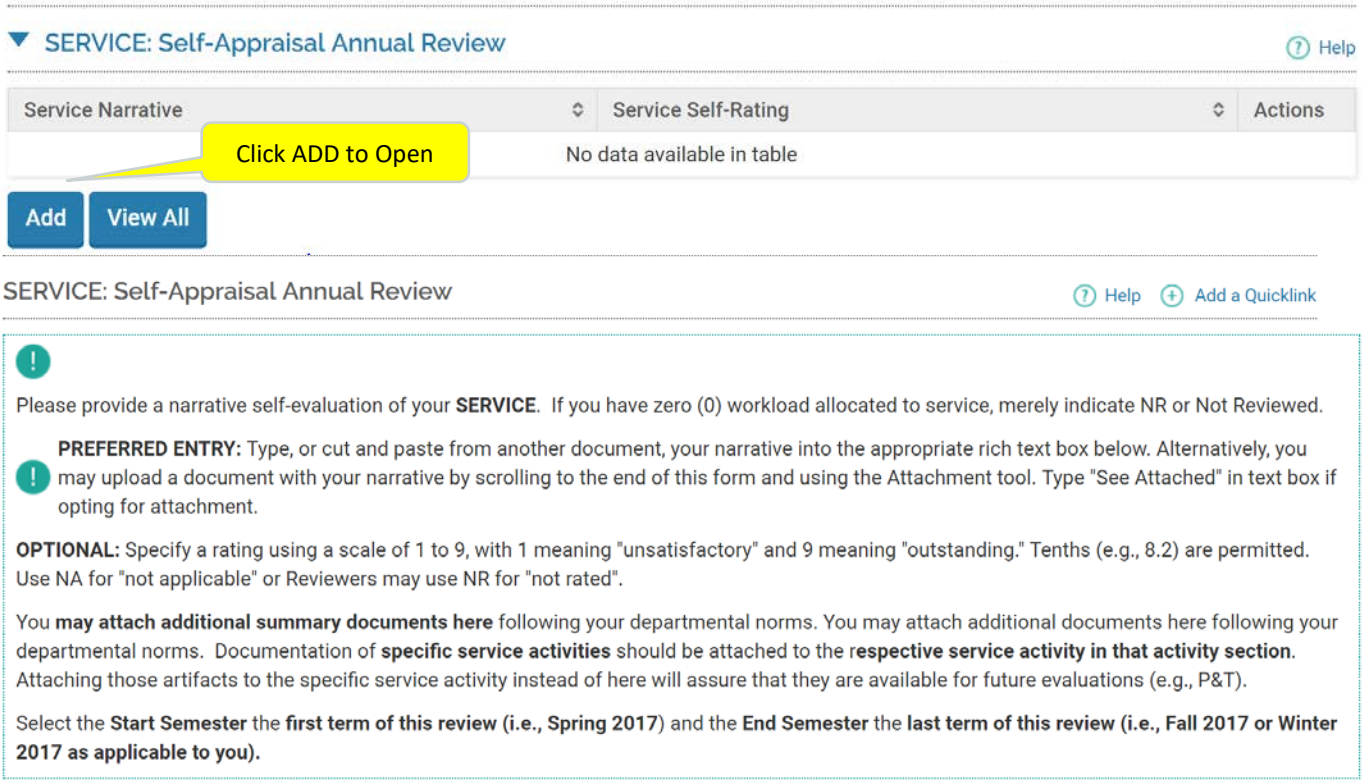
Let's say you need to change the status and/or term. Select the desired Status from the pull-down. You can make any other needed changes such as the semester of the status or other details of the proposal. Please be aware, that the status must be within the evaluation period for this item to appear on your evaluation record. Scroll down to the Activity Classifications and select "Show" in the "Hide from Evaluations" classification.

Scroll to the bottom and click "Save and Go Back" to return to the Input form. This cloned item will now appear on your evaluation record.

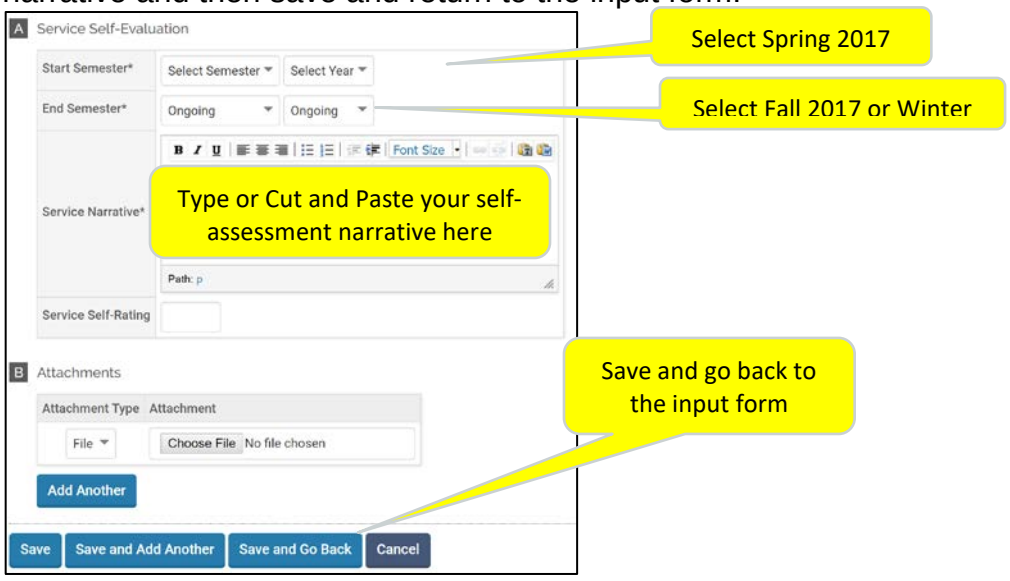


Service Self-Evaluation

The self-evaluation for Service works the same as the Teaching and Research self-evaluation. Click the “Add” button to open the form.
Scroll down to complete the evaluation sections in the same way that you did for your teaching evaluation. Select the start and end terms being evaluated. Enter your service self-appraisal narrative and then save and return to the input form.



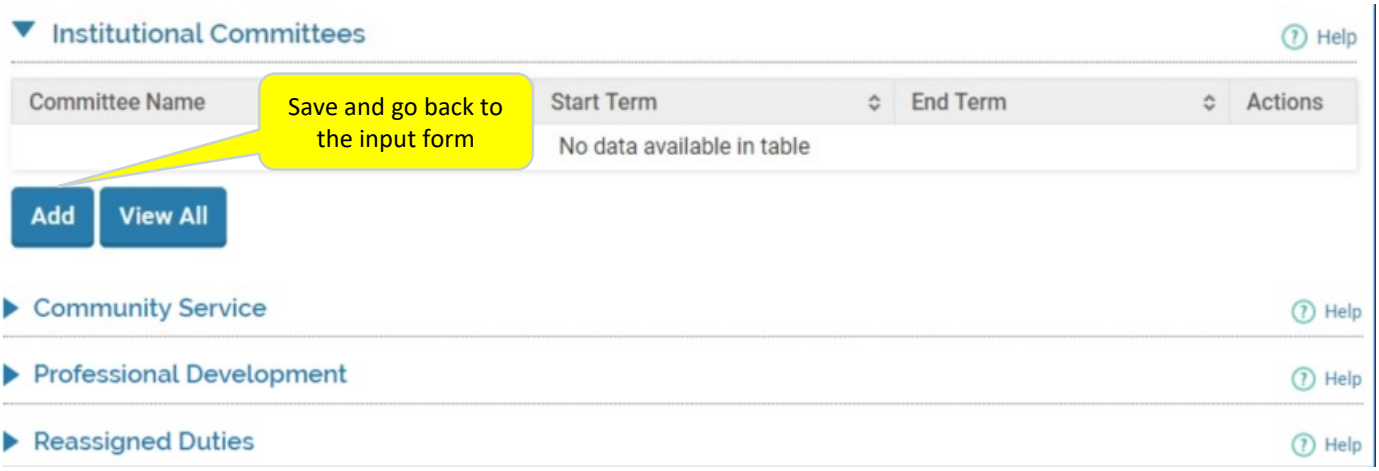
Scroll down to complete the evaluation sections in the same way that you did for your teaching evaluation. Select the start and end terms being evaluated. Enter your service self-appraisal narrative and then save and return to the input form.

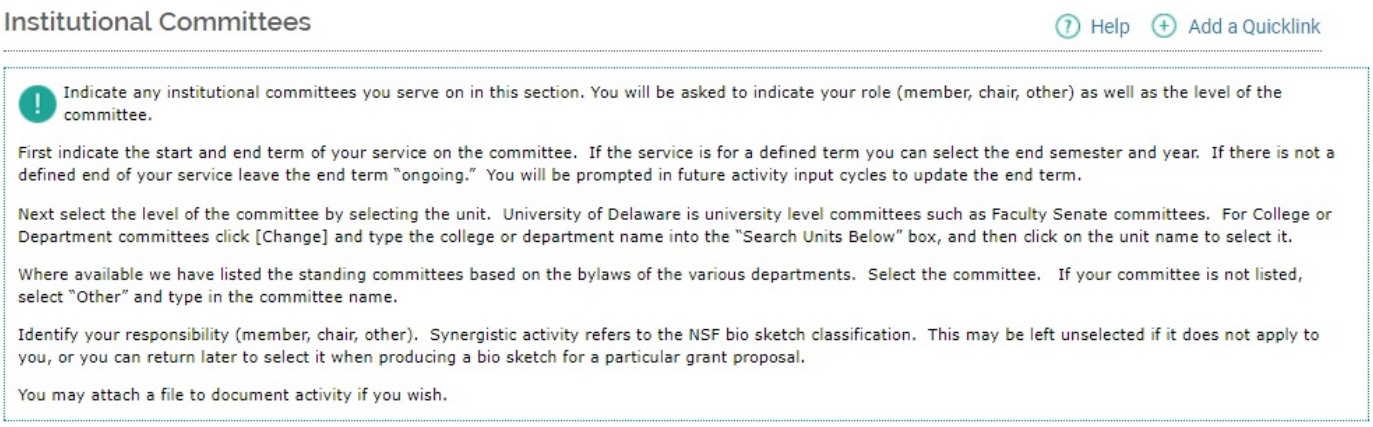


Update Service Activities

Service activities can be added under the appropriate sections including Institutional Committees, Other Institutional Service, Professional Service, Community Service, etc. Departments differ on their norms for reporting service activities and consulting, etc., so follow your department norms.

To add a service activity, click "Add" to open the form. Read the onscreen instructions for adding service activities.

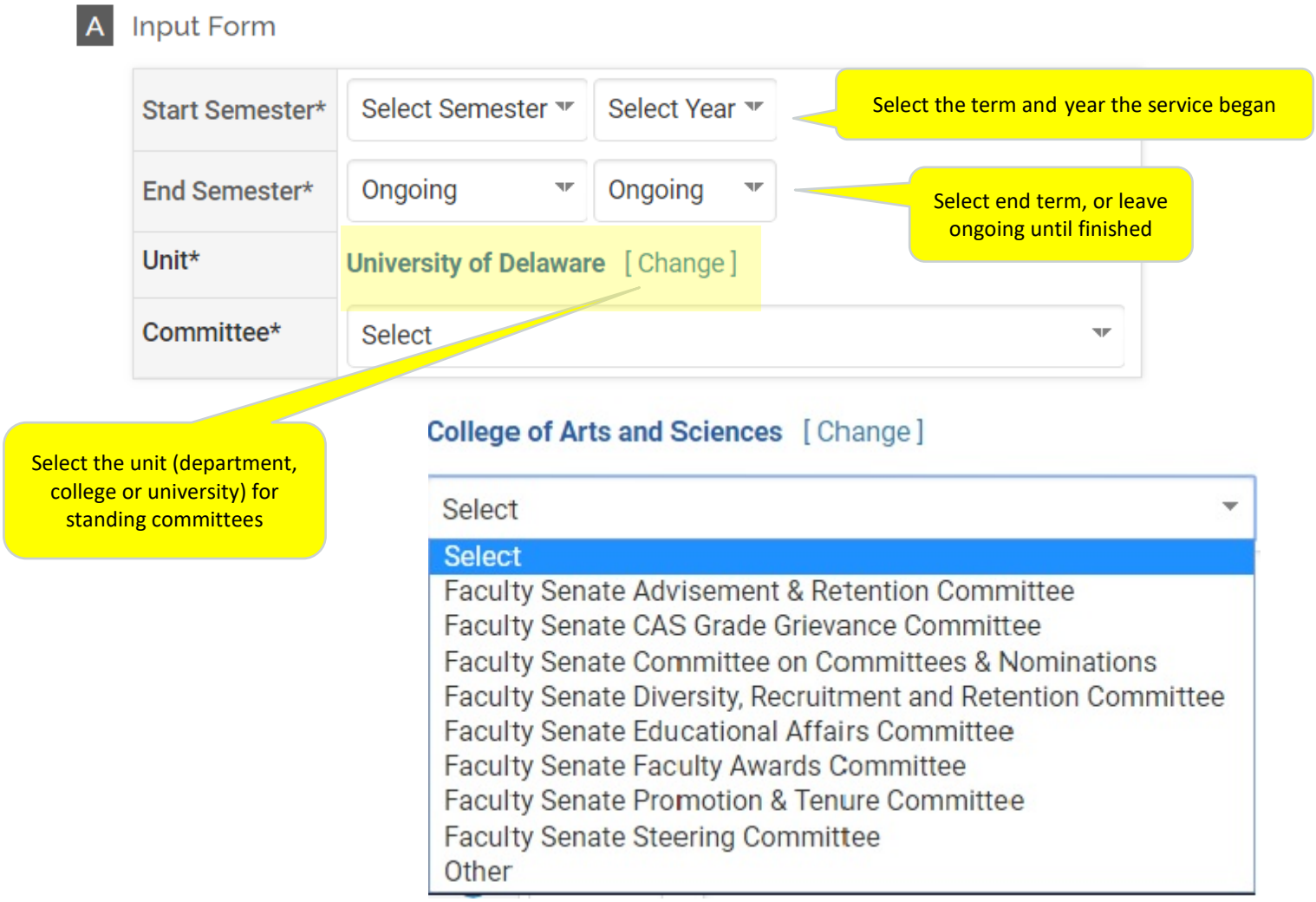




Record Institutional Committees

Review and add Service Activities: Select the term and year for the service start term and end term or leave ongoing until finished. This can be updated later when the service ends.

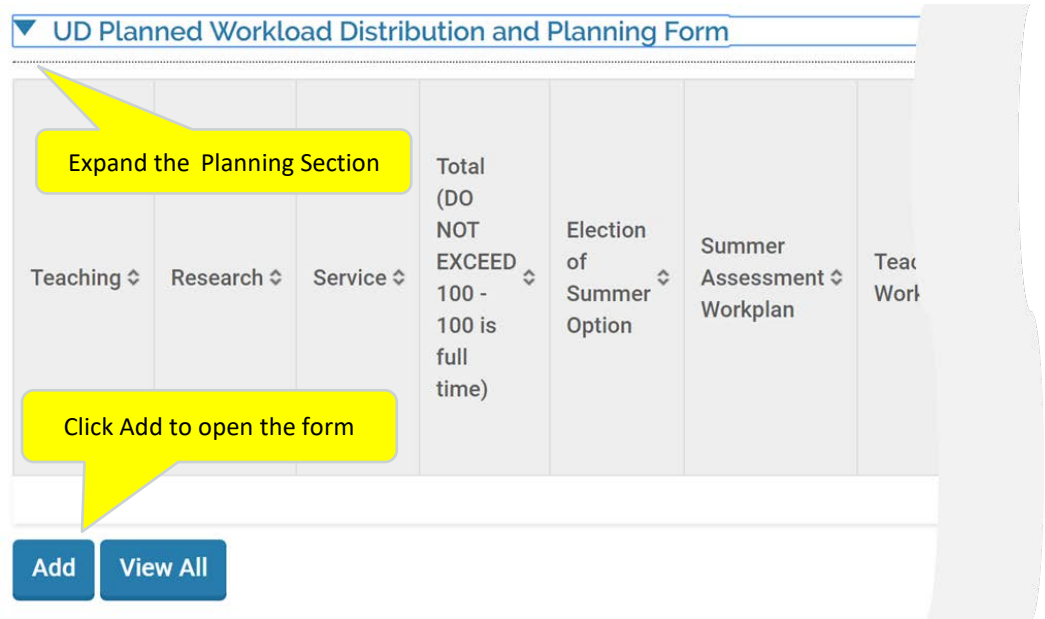
Select the unit (department, college or university) for standing committees. The Committee drop down provides a list of standing committees within that unit to choose from, or select “Other” and type in the committee name.


A Input Form
Start Semester*
Select Semester
Select Year
Select the term and year the service began
End Semester*
Ongoing
Ongoing
Select end term, or leave ongoing until finished
Unit*
University of Delaware [Change]
Committee*
Select
Select the unit (department, college or university) for standing committees
College of Arts and Sciences [Change]
Select
Select
Faculty Senate Advisement & Retention Committee
Faculty Senate CAS Grade Grievance Committee
Faculty Senate Committee on Committees & Nominations
Faculty Senate Diversity, Recruitment and Retention Committee
Faculty Senate Educational Affairs Committee
Faculty Senate Faculty Awards Committee
Faculty Senate Promotion & Tenure Committee
Faculty Senate Steering Committee
Other

Prepare Your Planning Form

Planning Form: Workload

When you expand the planning section a wide table appears. Click “Add” to open the form.
The first section is the planned workload for the next academic year. It is very important that you select WINTER 2018 in order for this to appear on your report for this year! Enter your workload proportions for each of Teaching, Research and Service. If you do not have workload in a given area, type 0 for that area. The sum of the three areas cannot exceed 100 which is a full-time workload. If you are part-time, or assigned to an academic area for less than 100% of your time, the total should sum to the proportion of a full-time workload.



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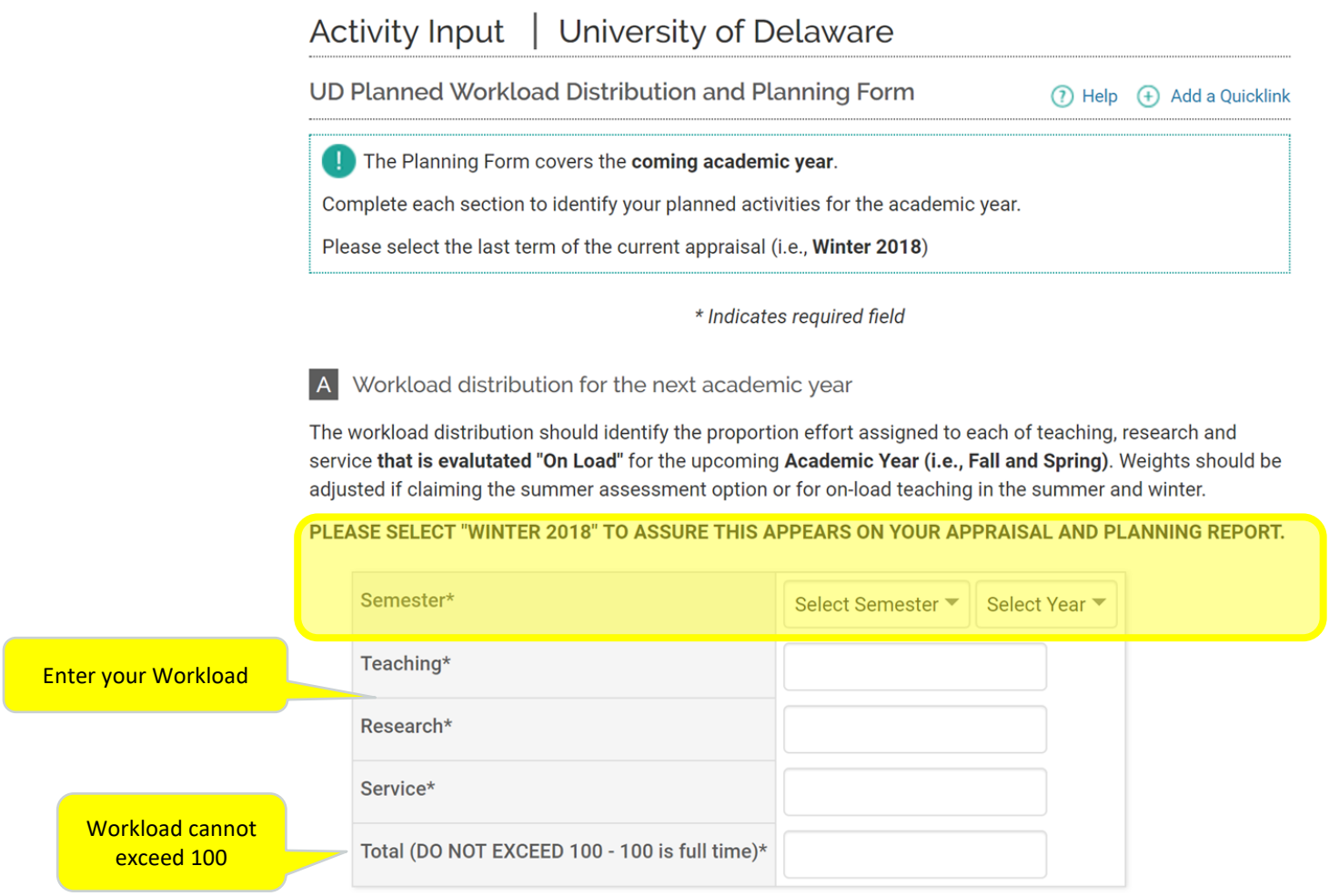
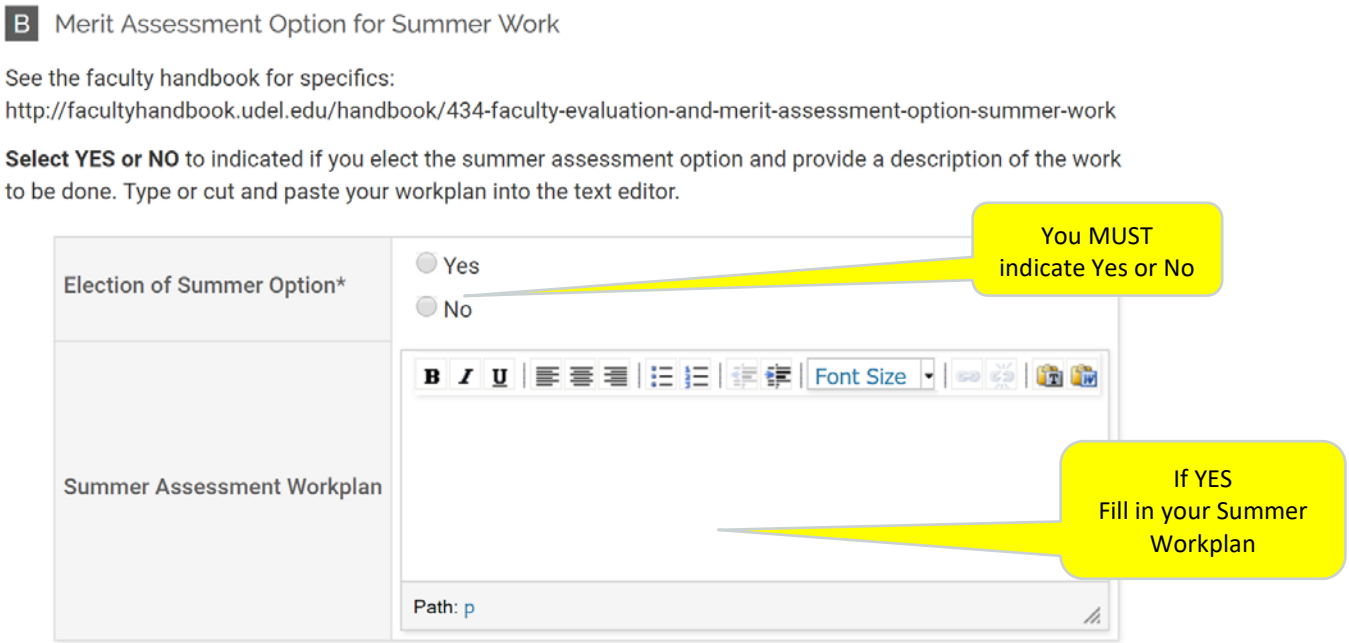


Planning Form: Summer Merit Assessment

The next section is the “Merit Assessment Option for Summer Work.”
You must select “Yes” or “No” to indicate whether or not you are electing the Summer Merit Assessment option. If you select “Yes,” type or cut and paste into the rich text form your work plan for the summer assessment option. Scroll down to the Planned Teaching section.



Planning Form: Teaching

Use the Planned Teaching section to record your plans for the upcoming academic year and requests for Special Sessions.
Fill in the required fields. If none, enter 0. Enter your Teaching Workload for the year. This should match the workload overview you entered in section A. Enter the number of course credits for the classes you will teach on-load and if applicable on overload for additional pay. If none, enter 0. List the courses you intend to teach with course number and if applicable the number of sections (e.g., ENGL110, 2 sections). Repeat this process for each term.
Scroll down to the next section.

C Planned Teaching

For each term, Indicate the total number of **course contact hours on-load** for the term. Enter 0 if not teaching in that term.

If applicable, indicate the number of course contact hours that are to be paid **overload** in each term **(if applicable)**.

For each course indicate the **course number**, and if requesting multiple section of the same course, the **number of sections**.

Asterisks Indicate Required Sections

Enter Teaching Workload for Year

Enter Course Contact Hours

List the Courses

Repeat for Each Term

Teaching Workload*	
Summer: Contact Hours On-load*	
Summer: Contact Hours OVERLOAD*	
Summer: List Course Numbers, and Number of Sections (for multiple section courses)	
Fall: Contact Hours On-load*	
Fall: Contact Hours OVERLOAD*	
Fall: List Course Numbers, Number of Sections (for multiple section courses)	
Winter: Contact Hours On-load*	
Winter: Contact Hours OVERLOAD*	
Winter: List Course Numbers, Number of Sections (for multiple section courses)	
Spring:Contact Hours On-load*	
Spring: Contact Hours OVERLOAD*	
Spring: List Course Numbers, Number of Sections (for multiple section courses)	

Planning Form: Advisement and Student Supervision

These sections are not required. Complete them as applicable to you and your department.
There is a field for you to enter explanatory comments in each section. When complete, scroll down in the form to the next sections

D Unscheduled Assigned Advisees

Indicate the number of assigned undergraduate and/or graduate advisees.

Do not include research, thsis or dissertation advisees here.

Number of undergraduate advisees.	
Number of graduate student advisees	
Comment Advising	

Fields for Comments

Scheduled Supervision

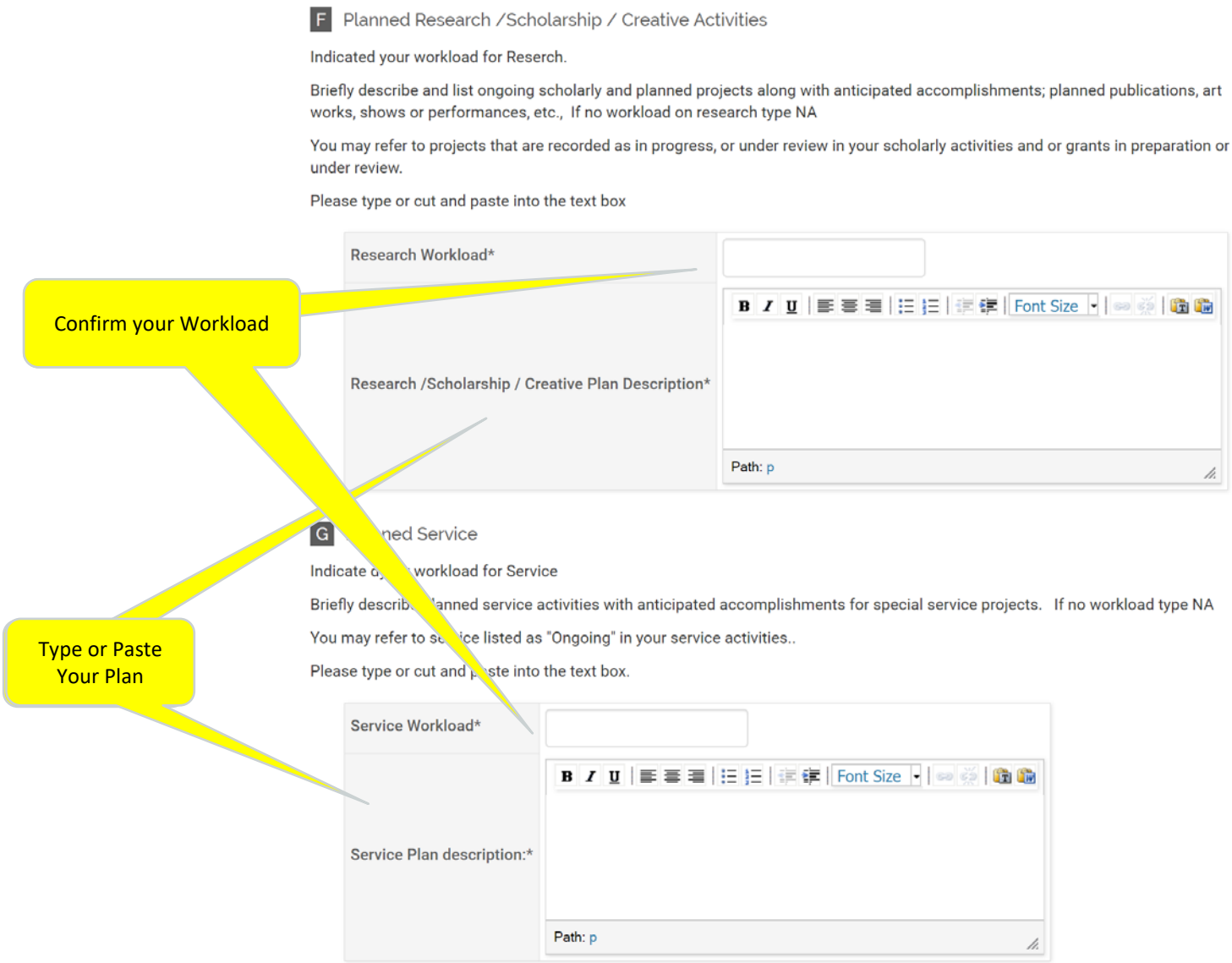
Indicate planned scheduled supervision such as independent study, field projects, and/or thesis / dissertation students.

For each lever (undergraduate, Masters, and Docotral) indicate number then check all supervison types that apply to that group of students.

# Undergraduate Students	
Undergraduate Supervision Types	☐ Independent study or special problem ☐ Internship or field experience ☐ Thesis or dissertation
# Master's Students	
Master's Supervision Types	☐ Independent study or special problem ☐ Internship or field experience ☐ Thesis or dissertation
# Doctoral Students	
Doctoral Supervision Types	☐ Independent study or special problem ☐ Internship or field experience ☐ Thesis or dissertation
Comment: Scheduled Supervision	

Planning Form: Research & Service

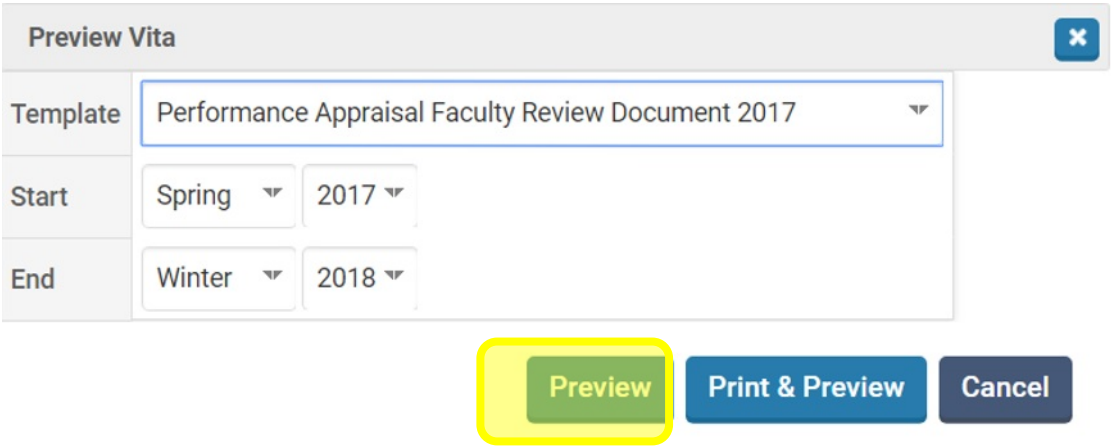
The Research and Service Planning sections ask that you describe your workplans in these activities for the coming academic year.
Confirm your workload. What you enter here should match what you indicated in the summary workload in section A of this form. Type or paste your workplan into the rich text box.



Save and go back to the Input form.

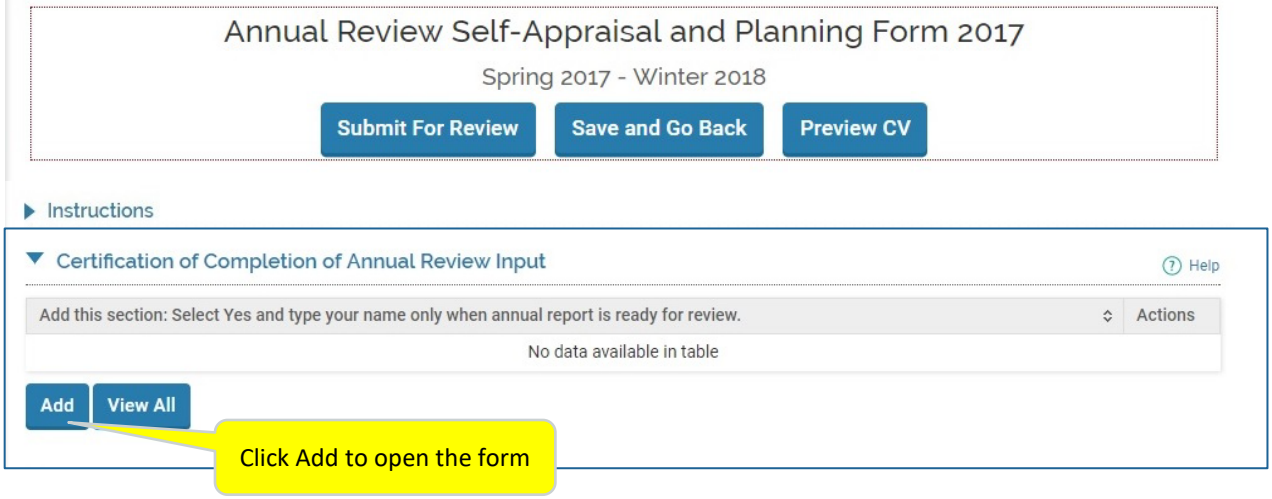
Preview Your Annual Review & Planning Report

You can review your Faculty Record by scrolling to the top of the Activity Input form and clicking on the “Preview CV” button.
The Preview form should already have the template and terms selected for this review. Then click “Preview.” The document will appear as your department chairperson will see it in the appraisal process. If you find anything missing in the Performance Appraisal Faculty document, merely return to the Activity Input form and update it as necessary.



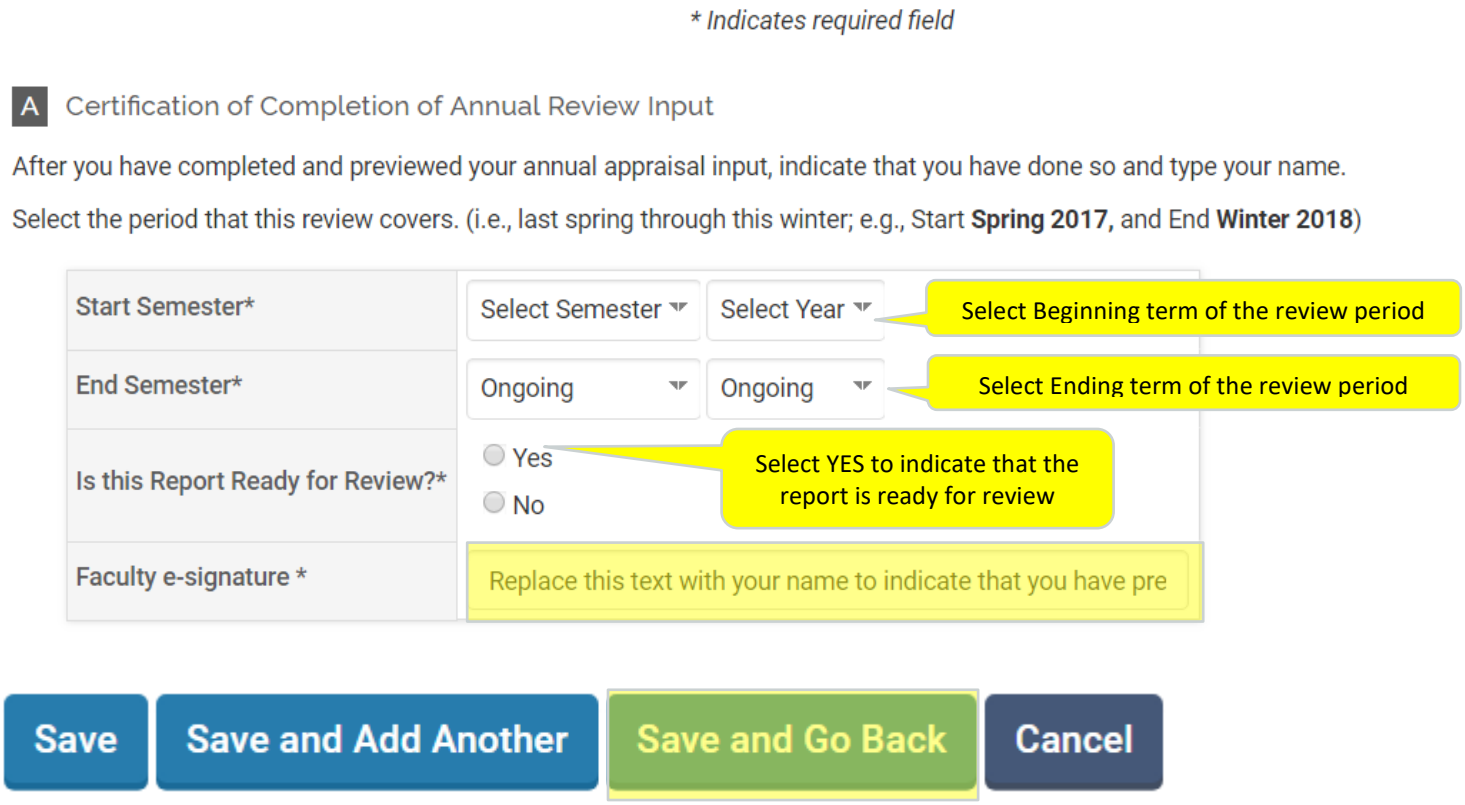
Certify that your Appraisal and Planning Report is Complete and Ready to Review

Once you are sure that you have completed all relevant sections, have previewed the document, and are sure that the report is ready for your Department Chairperson or School Director to review, click the “Add” button to reveal the form.



Again, select the period of this review. Check “Yes” that the report is ready for review and type you name in the signature box.

When done click “Save and Go Back” to return to the Input form.

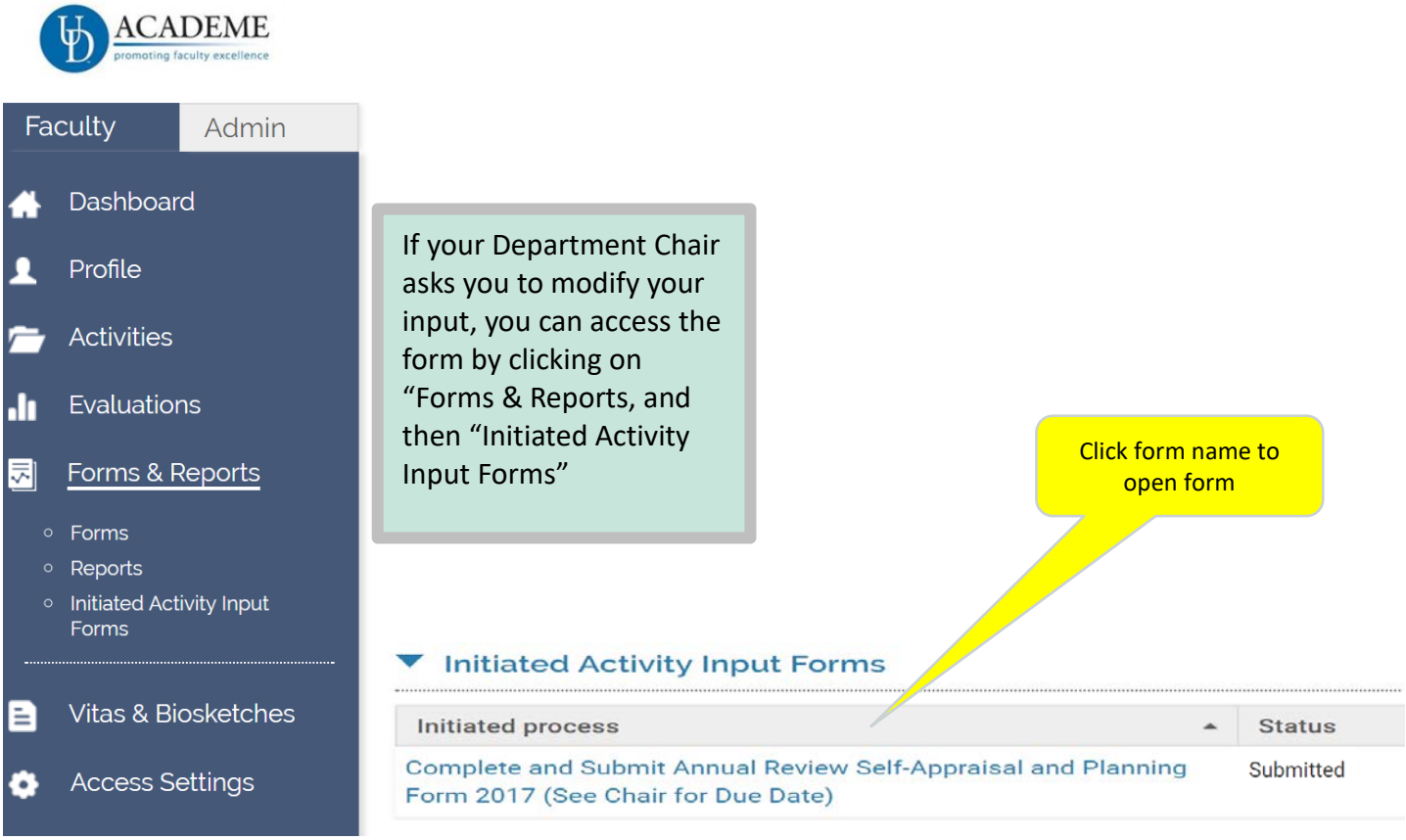


Submit for Review

When you are satisfied that your faculty record is accurate and you have certified that the Report is complete and ready for review, click “Submit for Review.”

How to Edit Review and Planning Input

If your Department Chair asks you to modify your input, you can access the form by clicking on "Forms & Reports," and then "Initiated Activity Input Forms."
The input form will be listed under "Initiated process." Click the form name to return to the form. The form will open with the content that you have previously entered. You can then edit the contents of that form, and then save it.
As long as this is done BEFORE your Chairperson submits the final review in UDAcademe, the new information will appear on your report.

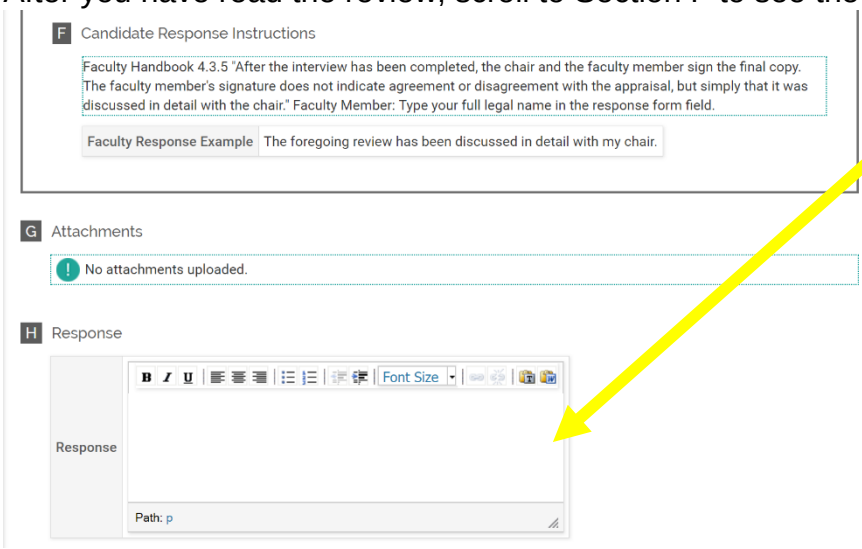


How to Sign-Off on the Review

After you have discussed your review with your Department Chair, the Chair will finalize the review in UDAcademe and submit the finalized review. At that time you will be notified that a review has been submitted for you. At that time you are required to sign-off on the review. Your sign-off does not mean that you agree with the review or rating. You are merely acknowledging that the review has been discussed with your Department Chairperson or School Director.

Your reviews can be accessed by clicking on "Evaluations" and then "View/Respond." You will be able to see the review submitted by your Chair. Click the View icon to see the review.

After you have read the review, scroll to Section F to see the response instructions.

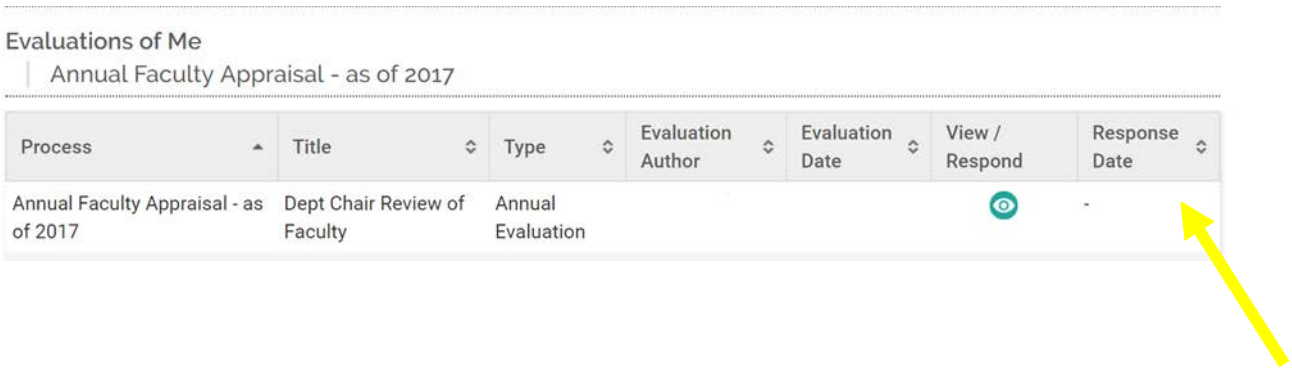


Type your response into the Response text field.

Click "Save and Go Back." This will return you to your Evaluations list. You will see that the current date and time will appear in the "Response Date" column. At this time the annual review is completed and submitted.

Click "Save and Go Back." This will return to your Evaluations list

You will see that the current date and time will appear in the “Response Date” column. At this time the annual review is completed and submitted.



Evaluations of Me

Annual Faculty Appraisal - as of 2017

Process	Title	Type	Evaluation Author	Evaluation Date	View / Respond	Response Date
Annual Faculty Appraisal - as of 2017	Dept Chair Review of Faculty	Annual Evaluation				-

YOU ARE DONE! CONGRATULATIONS

Contact info
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Login: udel.edu/academe