

Faculty Evaluations User Guide for Department Chair/Director

Table of Contents

Section 1 - Faculty Evaluations	3
Section 2 - Dean Evaluations of Chair.....	11
Section 3 - Reports	14
Tips	15



What is WORKforUM?

WORKforUM is the University's evaluation review software used by Faculty, Chairs, Directors, and Deans.

Purpose

This training material highlights how to manage and use the WORKforUM Faculty review evaluation software.

Audience

This training material is designed for University Chairs/Directors who use WORKforUM to review faculty, themselves, and the Dean.

Section 1 - Faculty Evaluations

1. Annually, you will receive an email from the system when evaluations are available. This is the first step to completing faculty evaluations.

From: "noreply@memphis.edu" <noreply@memphis.edu>
Date: Thursday, November 30, 2017 at 10:01 AM
To: [REDACTED]
Subject: Your Performance Management Action Items

There are Performance Management Action Items

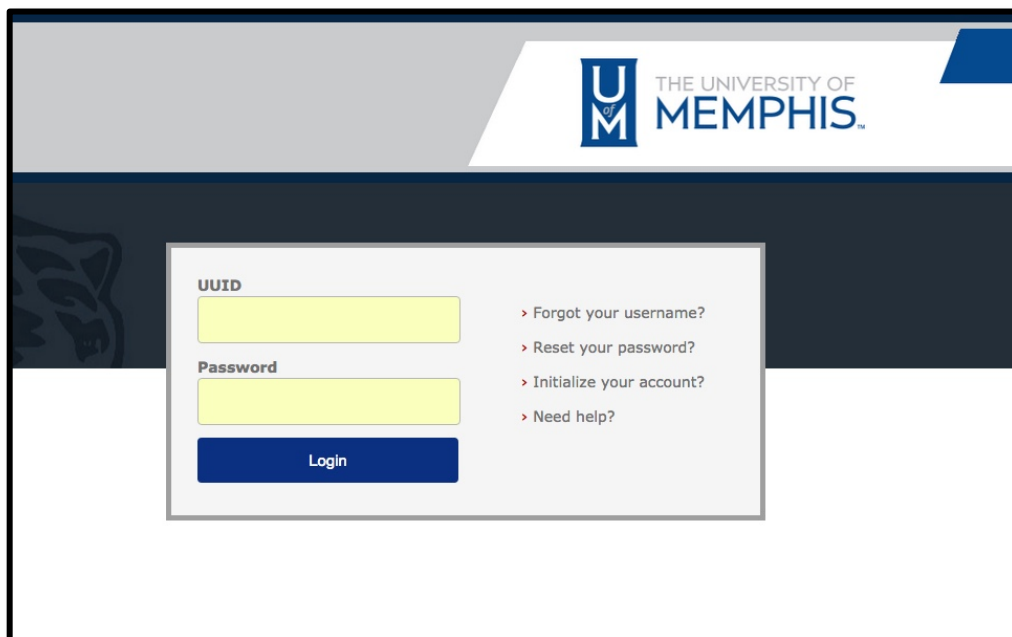
Please Log into the [myMemphis Portal](#) within WorkForum and complete your action items.

Contact facultyevals@memphis.edu if you have any questions

Thank you for your assistance and attention to this reminder.

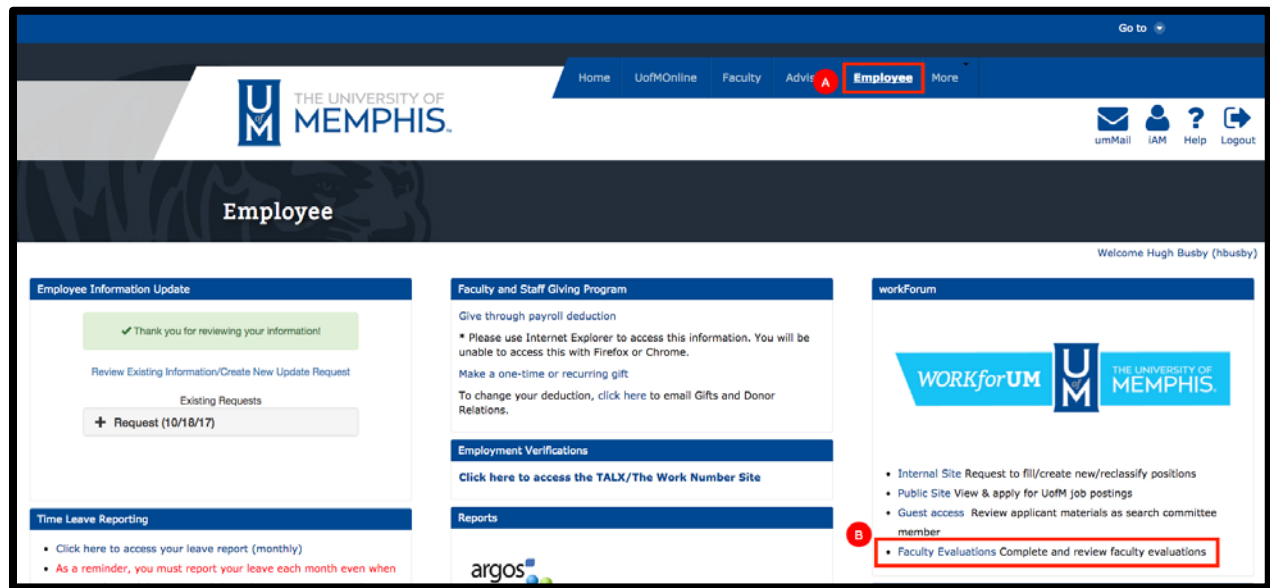
2. Log into the myMemphis Portal. Remember, use your University of Memphis Universal User Identification (UUID) and password.

Note: The myMemphis Portal has a time-out of one hour. After one hour of inactivity, the myMemphis Portal will log you out. This is a security feature.



The screenshot shows the myMemphis Portal login interface. At the top right is the University of Memphis logo. The main content area has a dark blue header with a tiger head logo on the left. Below the header is a white box containing the login form. The form has two input fields: 'UUID' and 'Password'. Below the 'Password' field is a blue 'Login' button. To the right of the input fields are four links: '> Forgot your username?', '> Reset your password?', '> Initialize your account?', and '> Need help?'.

3. A) Click Employee Page and go to the Workforum portlet. B) Click Faculty Evaluations to access the evaluations.

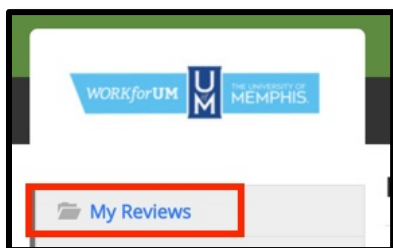


4. If you are logging in from the link on the email and not logging in from within myMemphis, you will need to enter your UUID and credentials.

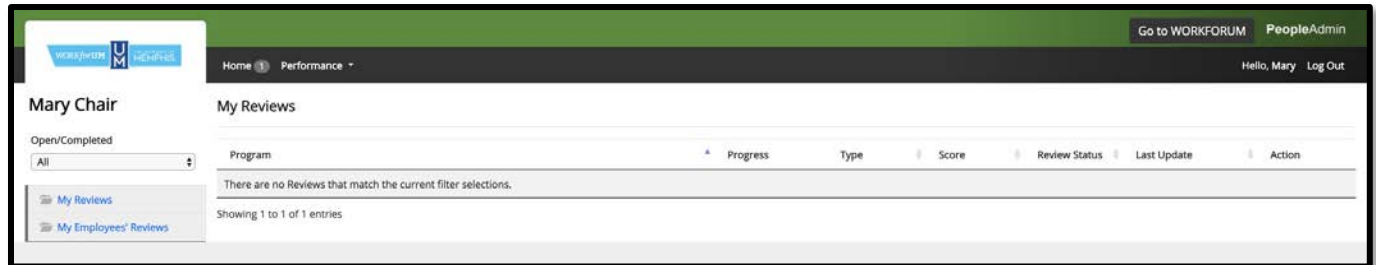
The screenshot shows a login form with the following elements:

- UUID** field with a placeholder text 'p.g., jsmith'.
- Password** field.
- Login** button.
- Links for:
 - > Forgot your username?
 - > Reset your password?
 - > Initialize your account?
 - > Need help?
- Footer text: 'By using this service, you acknowledge that you have read and agree to the terms and conditions of the Acceptable Use of Information Technology Resources Policy (UM1535)'.

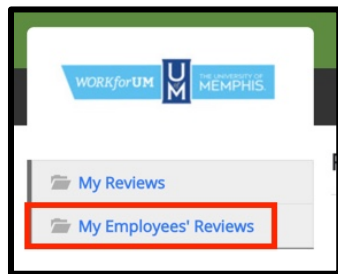
5. Once in the Internal Workforum site, click My Reviews.



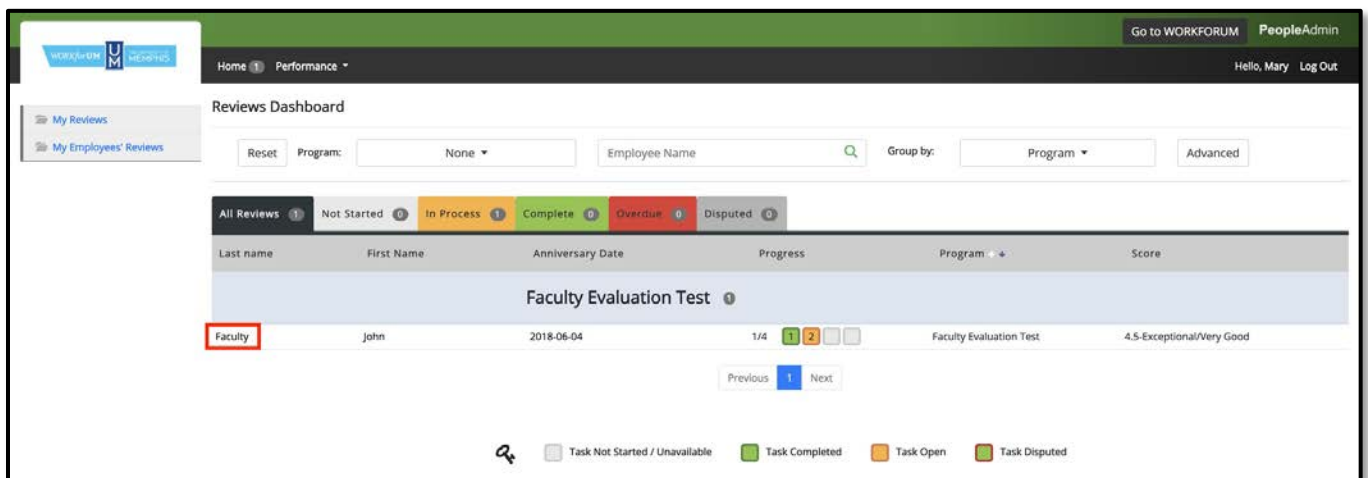
6. Once logged in you will see this screen.



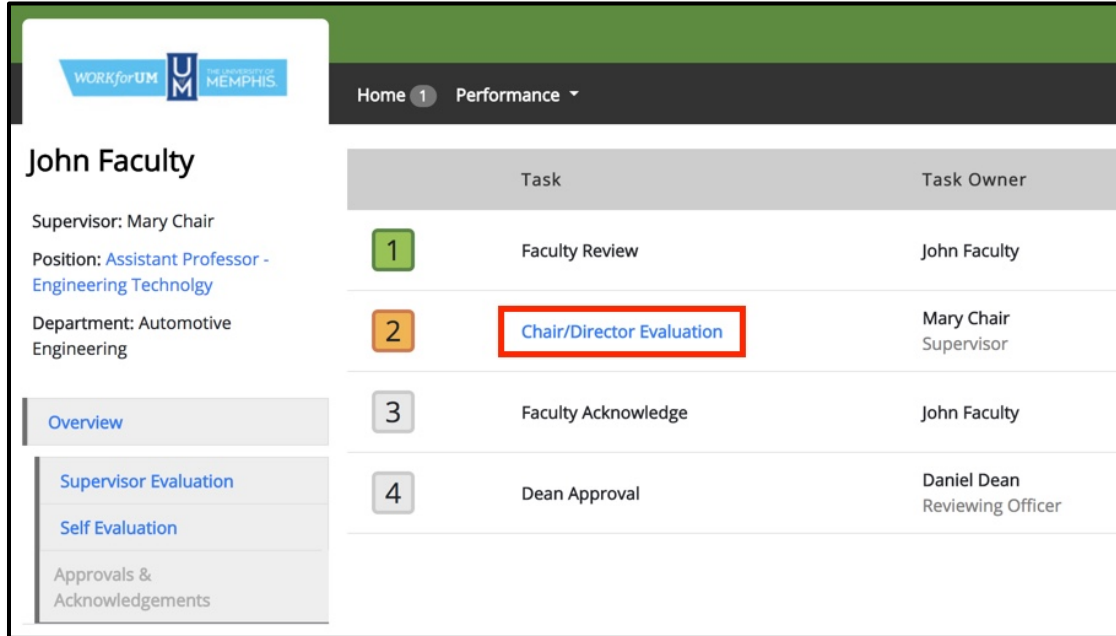
7. Click My Employee Reviews.



8. Select the person you would like to evaluate from the list and click on the Employee Name.



9. To view the faculty member's evaluation, select Chair/Director Evaluation.



The screenshot shows the 'Performance' section for 'John Faculty'. On the left, a sidebar lists navigation options: Overview, Supervisor Evaluation, Self Evaluation, and Approvals & Acknowledgements. The main content area displays a table of tasks. The second task, 'Chair/Director Evaluation', is highlighted with a red box. The table lists four tasks with their respective owners.

	Task	Task Owner
1	Faculty Review	John Faculty
2	Chair/Director Evaluation	Mary Chair Supervisor
3	Faculty Acknowledge	John Faculty
4	Dean Approval	Daniel Dean Reviewing Officer

10. This is the Chair/Dean Evaluation Review Screen. Enter comments for each area (all areas are required).

The screenshot shows the 'Self Evaluation for John Faculty' screen. On the left, a sidebar lists navigation options: Overview, Supervisor Evaluation, Self Evaluation (selected), Approvals & Acknowledgements, and My Reviews. The main content area is titled 'Self Evaluation for John Faculty' and includes a blue note: '***NOTE: If you have attachments and you have already entered information in the fields below, you must click Save Draft before adding attachments. Attachments must be added before clicking Complete. You will not be able to go back and add them.' Below this, there are three sections for entering comments: 'Faculty Teaching', 'Faculty - Advising/Mentoring', and 'Faculty - Scholarship/Creative Activities'. Each section has a 'Faculty Comments' text area and a 'Remove Entry?' checkbox. On the right side, there is a 'Faculty Evaluation Test' summary showing 'Review Status: Open', 'Evaluation Type: Focal', 'Program Timeframe: 01/01/17 to 12/31/17', 'Last Updated: June 08, 2018 14:45', and 'Last Completed Step: Chair/Director Evaluation'. A 'Check spelling' link is also visible near the attachments section.

Note: The text boxes are expandable. This allows you to see more of your data.

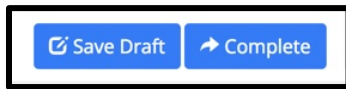
This close-up shows the 'Supervisor Comments' section. It features a large, expandable text area for entering comments. At the bottom left of this section is a 'Remove Entry?' checkbox. At the bottom right, there is a small icon of a document with a pencil, which is highlighted by a red square, indicating it is a clickable element for saving or editing the entry.

There is a Remove Entry checkbox at the bottom of each comment area. To delete data, check this box then Save Draft.

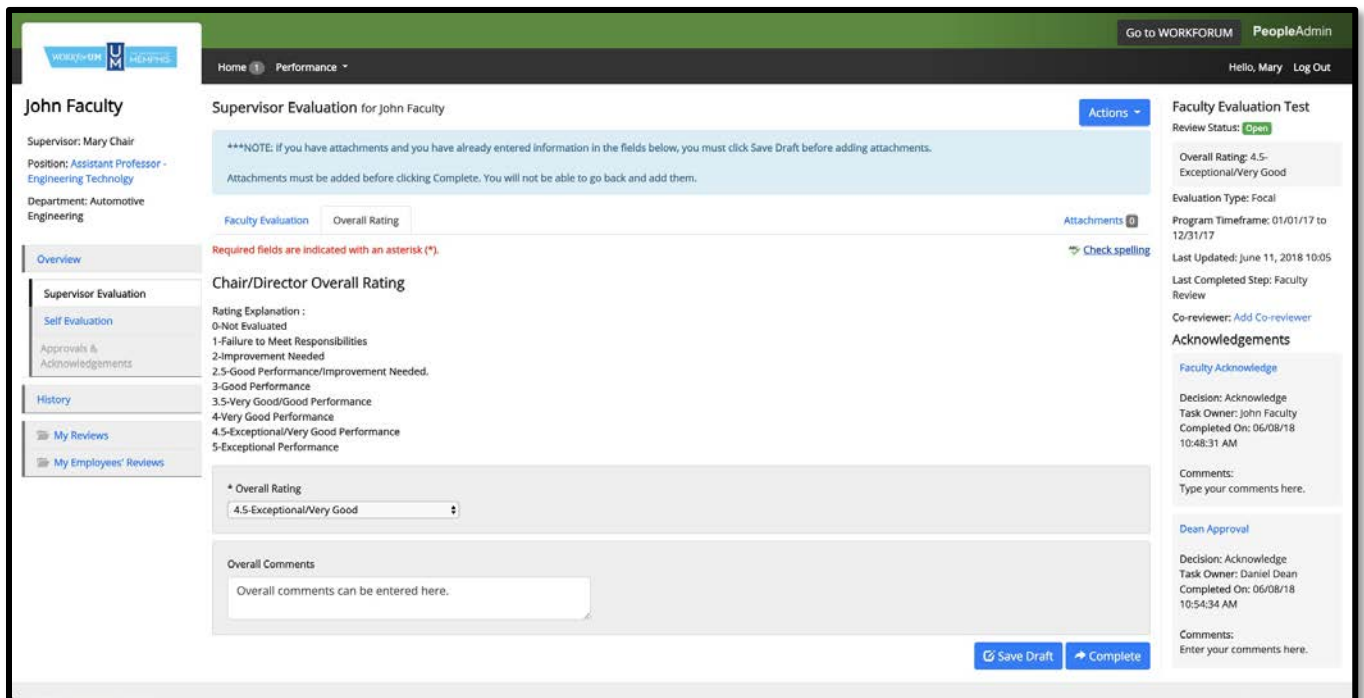
Note: Your data will be deleted and not recoverable.

This close-up shows the 'Remove Entry?' checkbox, which is currently unchecked. The text 'Remove Entry?' is displayed next to the checkbox.

11. Once you have finished filling out all areas of the evaluation, select Save Draft if you would like to come back to the evaluation at a later time. If you are ready to continue, select Next to proceed to the Overall Rating screen by selecting the Overall Rating tab.

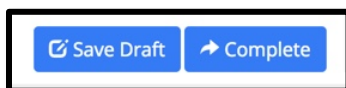


12. Select an overall rating from the drop-down menu and enter overall comments. Both fields are required to complete the evaluation.

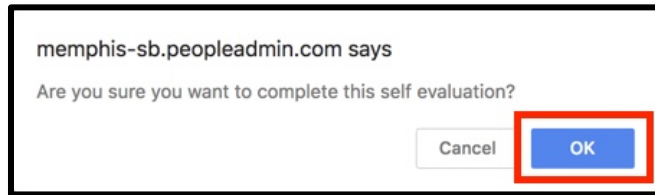
A screenshot of the 'Supervisor Evaluation for John Faculty' form. The form is divided into several sections. On the left, there is a sidebar with navigation links: 'Overview', 'Supervisor Evaluation', 'Self Evaluation', 'Approvals & Acknowledgements', 'History', 'My Reviews', and 'My Employees' Reviews'. The main content area has tabs for 'Faculty Evaluation' and 'Overall Rating'. The 'Overall Rating' tab is active, showing a 'Chair/Director Overall Rating' section with a 'Rating Explanation' list (0-Not Evaluated to 5-Exceptional Performance). Below this is a drop-down menu for 'Overall Rating' with '4.5-Exceptional/Very Good' selected. There is also a text area for 'Overall Comments' with the placeholder text 'Overall comments can be entered here.' At the bottom right of the form are 'Save Draft' and 'Complete' buttons. On the right side of the form, there is a 'Faculty Evaluation Test' section with 'Review Status: Open', 'Overall Rating: 4.5-Exceptional/Very Good', 'Evaluation Type: Focal', 'Program Timeframe: 01/01/17 to 12/31/17', 'Last Updated: June 11, 2018 10:05', 'Last Completed Step: Faculty Review', 'Co-reviewer: Add Co-reviewer', 'Acknowledgements', 'Faculty Acknowledge', 'Decision: Acknowledge', 'Task Owner: John Faculty', 'Completed On: 06/08/18 10:48:31 AM', 'Comments: Type your comments here.', 'Dean Approval', 'Decision: Acknowledge', 'Task Owner: Daniel Dean', 'Completed On: 06/08/18 10:54:34 AM', and 'Comments: Enter your comments here.'.

13. Once you have completed the evaluation, select Complete.

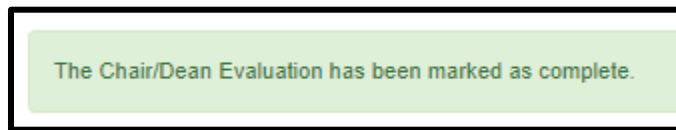
Note: If you're not ready to complete, select Save Draft.



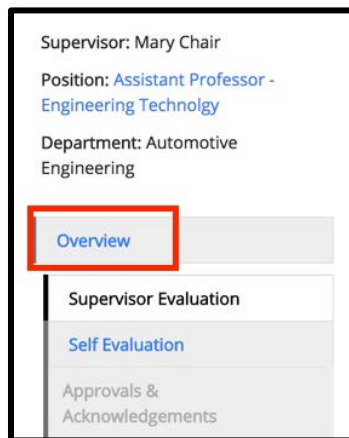
14. Once you click complete you will see a message asking, “Are you sure you want to complete this evaluation?” Click OK.



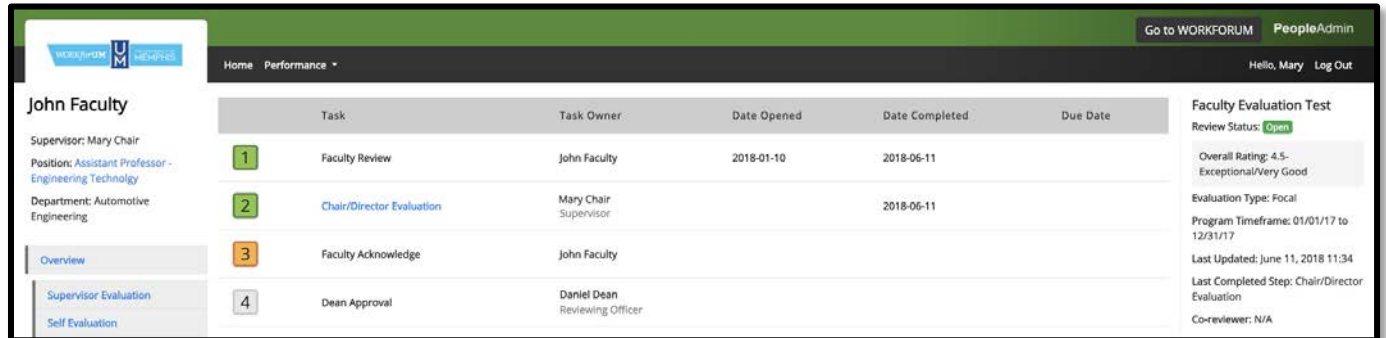
15. When you select Complete, you will see the message that the Chair/Dean Evaluation has been marked as complete. The faculty member will then receive an email that they can acknowledge your evaluation.



16. Select Overview to return to the main review page.



When you select Overview, you will see:



The screenshot shows the WORKforUM PeopleAdmin interface. On the left, a sidebar for 'John Faculty' lists roles: Supervisor (Mary Chair), Position (Assistant Professor - Engineering Technology), and Department (Automotive Engineering). The 'Overview' tab is selected. The main content area displays a table of tasks for the 'Faculty Evaluation Test'.

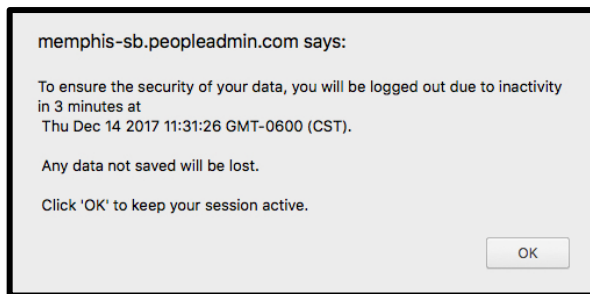
Task	Task Owner	Date Opened	Date Completed	Due Date
1 Faculty Review	John Faculty	2018-01-10	2018-06-11	
2 Chair/Director Evaluation	Mary Chair Supervisor		2018-06-11	
3 Faculty Acknowledge	John Faculty			
4 Dean Approval	Daniel Dean Reviewing Officer			

On the right, summary information for the 'Faculty Evaluation Test' is shown: Review Status (Open), Overall Rating (4.5-Exceptional/Very Good), Evaluation Type (Focal), Program Timeframe (01/01/17 to 12/31/17), Last Updated (June 11, 2018 11:34), Last Completed Step (Chair/Director Evaluation), and Co-reviewer (N/A).

Steps 1-4 will change color depending on what stage they are in the evaluation process.



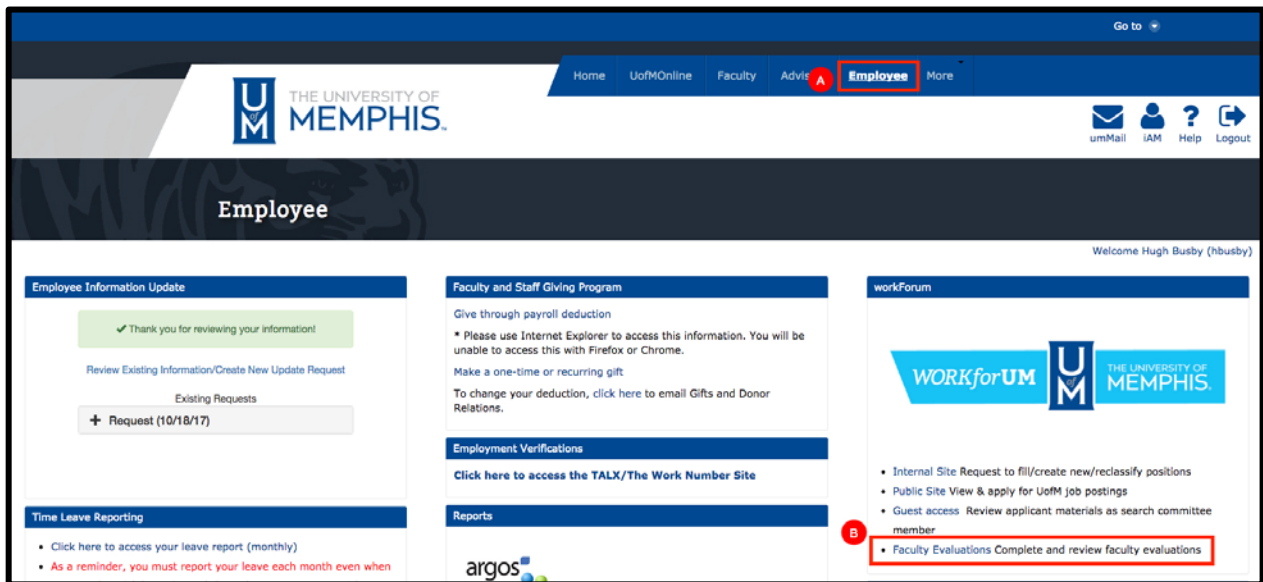
Note: WORKforUM has a time-out of one hour. After one hour of inactivity, the WORKforUM will log you out. This is a security feature. When you are nearing this, you will receive an onscreen message. Click OK to continue your session.



The screenshot shows a security warning dialog box. The text inside reads: 'memphis-sb.peopleadmin.com says: To ensure the security of your data, you will be logged out due to inactivity in 3 minutes at Thu Dec 14 2017 11:31:26 GMT-0600 (CST). Any data not saved will be lost. Click 'OK' to keep your session active.' An 'OK' button is located at the bottom right of the dialog.

Section 2 - Dean Evaluations of Chair

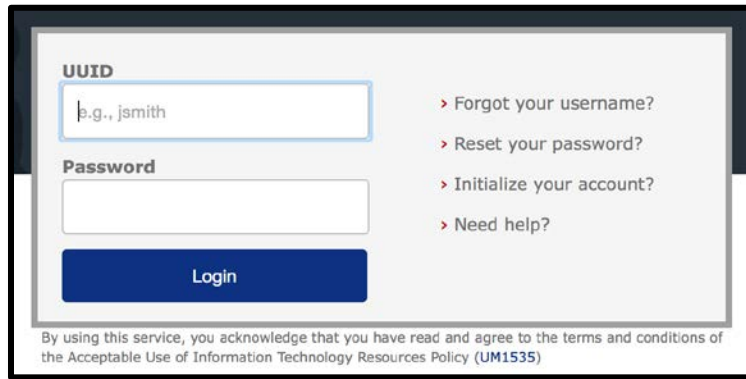
1. Once the Dean has completed your evaluation, you will receive an email from the system when the evaluation is available for viewing. Click on the link in your email to access the Workforum site within myMemphis. Alternatively, Log into MyMemphis, A) click on the Employee Page and go to the Workforum portlet, B) Click Faculty Evaluations to access the evaluations.



The screenshot displays the myMemphis Employee portal. The top navigation bar includes links for Home, UofMOnline, Faculty, Advice, **Employee** (highlighted with a red box and a red 'A'), and More. The main content area is titled 'Employee' and includes a welcome message for 'Hugh Busby (hbusby)'. The page is divided into several portlets:

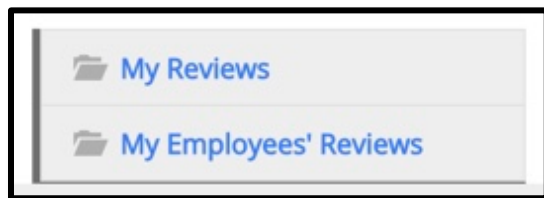
- Employee Information Update:** Contains a green confirmation message, a link to 'Review Existing Information/Create New Update Request', and a '+ Request (10/18/17)' button.
- Time Leave Reporting:** Includes instructions to click for a monthly leave report and a reminder to report leave each month.
- Faculty and Staff Giving Program:** Provides information on payroll deductions and links to the TALX/The Work Number Site.
- Employment Verifications:** A section for employment verification requests.
- Reports:** A section for various reports.
- workForum:** Contains a 'WORKforUM' logo and a list of links: 'Internal Site Request to fill/create new/reclassify positions', 'Public Site View & apply for UofM job postings', 'Guest access Review applicant materials as search committee member', and 'Faculty Evaluations Complete and review faculty evaluations' (highlighted with a red box and a red 'B').

- If you are logging in from the link on the email and not logging in from within myMemphis, you will need to enter your UUID and credentials.

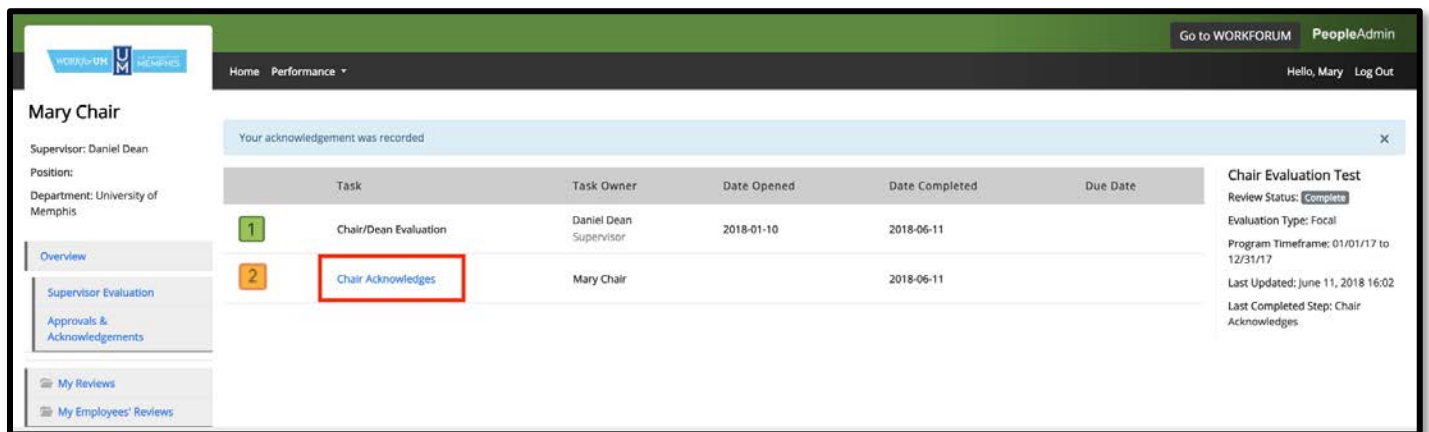


A login form with a light gray background. It features a 'UUID' label above a text input field containing 'e.g., jsmith'. Below this is a 'Password' label above another text input field. A blue 'Login' button is positioned below the password field. To the right of the input fields are four links: '> Forgot your username?', '> Reset your password?', '> Initialize your account?', and '> Need help?'. At the bottom, a small disclaimer states: 'By using this service, you acknowledge that you have read and agree to the terms and conditions of the Acceptable Use of Information Technology Resources Policy (UM1535)'.

- Once in the Internal WORKforUM site, click My Reviews.



You should see the following screen. Click on Chair Acknowledges to acknowledge your evaluation.



The screenshot shows the WORKforUM interface for a user named Mary Chair. The left sidebar contains navigation links: Overview, Supervisor Evaluation, Approvals & Acknowledgements, My Reviews, and My Employees' Reviews. The main content area displays a table of tasks. The first task is 'Chair/Dean Evaluation' with a status of '1' and a due date of 2018-06-11. The second task is 'Chair Acknowledges' with a status of '2' and a due date of 2018-06-11. The 'Chair Acknowledges' task is highlighted with a red box. A notification banner at the top states 'Your acknowledgement was recorded'. On the right, a 'Chair Evaluation Test' summary shows a 'Review Status' of 'Complete' and other details.

Task	Task Owner	Date Opened	Date Completed	Due Date
1 Chair/Dean Evaluation	Daniel Dean Supervisor	2018-01-10	2018-06-11	
2 Chair Acknowledges	Mary Chair		2018-06-11	

Chair Evaluation Test
Review Status: Complete
Evaluation Type: Focal
Program Timeframe: 01/01/17 to 12/31/17
Last Updated: June 11, 2018 16:02
Last Completed Step: Chair Acknowledges

Note: You may need to click on the Home link at the top to see menu of all reviews.



You will be taken to your review for Acknowledgement. It is located at the bottom of your review. After you have read the comments and ratings entered by your Dean, you can add comments if you wish and select Acknowledge.

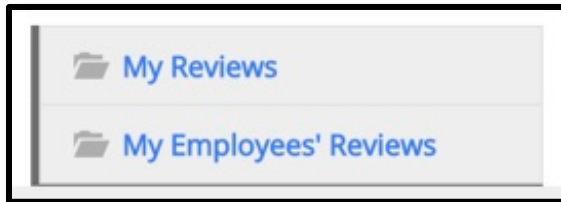
A screenshot of the 'Chair/Dean Evaluation' form for Gary Emmert. The form has a header with the title and an 'Actions' dropdown. Below is a section for 'Dean's Comments' with a text area and a 'Check spelling' link. At the bottom right, there is a blue 'Acknowledge' button with a red rectangular box around it.

4. When you acknowledge your evaluation, the Review Status will change to Complete.

A screenshot of a summary card for '2017 - Faculty Evaluation 15'. The card displays the following information: 'Review Status: Complete' (with 'Complete' in a red box), 'Overall Rating: 4.5- Exceptional/Very Good (4.0)', 'Evaluation Type: Focal', 'Program Timeframe: 11/22/17 to -', 'Last Updated: December 04, 2017 15:23', 'Last Completed Step: Dean Approval', and 'Co-reviewer: N/A'.

Section 3 - Reports

1. To access the Faculty Evaluation Reports, select the My Employees' Reviews.



2. The Chair can see the status of everyone in their department.

2017 - Faculty Evaluation 15					
	None	0/4	1		2017 - Faculty Evaluation 15
	None	0/4	1		2017 - Faculty Evaluation 15
	None	3/4	1	2	2017 - Faculty Evaluation 15 4.5-Exceptional/Very Good (4.0)
	None	0/4	1		2017 - Faculty Evaluation 15
	None	0/4	1		2017 - Faculty Evaluation 15
	None	0/4	1		2017 - Faculty Evaluation 15
	None	0/4	1		2017 - Faculty Evaluation 15
	None	0/4	1		2017 - Faculty Evaluation 15
	None	0/4	1		2017 - Faculty Evaluation 15

Note: Steps 1-4 will change color depending on what stage they are in the evaluation process.

Not Started	In Process	Complete	Overdue	Disputed
-------------	------------	----------	---------	----------

Tips

PeopleAdmin has some features convenient for the people who use it.

1. When the Dean completes the evaluation, your evaluation status will change to Complete.

2017 - Chair Performance Appraisal			
Evaluation Type:	Focal	Review Status:	Complete
Program Timeframe:	01/25/17 to -	Last Updated:	November 13, 2017 14:56
Position Description:	Assoc Professor Chair	Last Completed Step:	Chair Acknowledge
Supervisor:	Dean		
Co-reviewer:	N/A		

2. You may click the Actions button to review and print your evaluation.

Actions ▾
Print