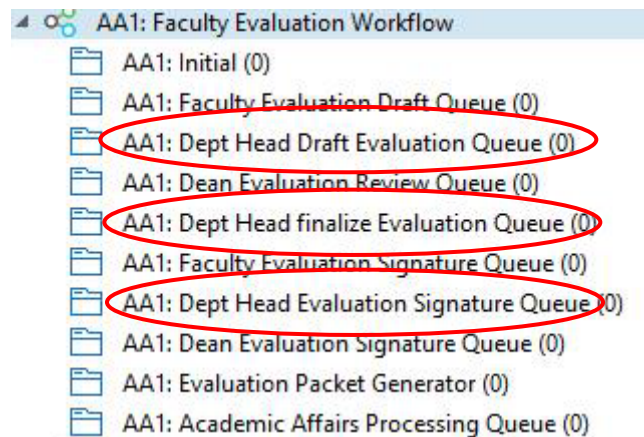


## Department Head Workflow Queues

This guide offers an overview of the OnBase workflow queues available to the Department Head (DH) in the Academic Faculty Evaluation process.

### Overview & Purpose of Department Head Workflow Queues

The DH Academic Faculty Evaluation workflow, titled *AA1: Faculty Evaluation Workflow*, is made up of a series of workflow queues. Queues are sequentially placed to mimic the flow of review and approval of a faculty evaluation.



Within the workflow, there are three workflow queues available to DHs:

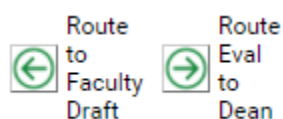
1. AA1: Dept Head Draft Evaluation Queue
2. AA1: Dept Head finalize Evaluation Queue
3. AA1: Dept Head Evaluation Signature Queue

Each queue has a specific purpose based on stage of the process:

#### AA1: Dept Head Draft Evaluation Queue

The *Dept Head Draft Evaluation Queue* is at the beginning of the process flow and provides DHs access to review and assess evaluations submitted by faculty members. DHs receive an email notification when a faculty evaluation enters this queue, including a direct link to the evaluation in workflow. In addition to entering Dean information, DHs are expected to provide assessment ratings and comments supporting those ratings for each of the three evaluation sections (teaching, scholarship, and service), as well as an overall assessment rating and supporting comments.

Two user actions are available in this queue for DHs to route the evaluation as appropriate:



# OnBase Quick Reference Guide

## A. Route to Faculty Draft

- This user action allows a DH to route the evaluation back to the faculty member if there is missing information, if clarification or corrections are needed, or for similar reasons. Once this user action has been selected, the DH will be prompted with a textbox to provide their reasoning for the returned evaluation, which will be sent to the faculty via email along with a link to the returned evaluation. The evaluation will remain in the faculty draft workflow queue until they resubmit it to the DH.

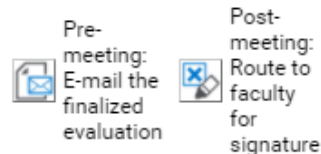
## B. Route Eval to Dean

- Once a DH has completed their evaluation, this user action will route the evaluation to the Dean for review.

## AA1: Dept Head finalize Evaluation Queue

The *Dept Head finalize Evaluation Queue* is in the middle of the process flow and provides DHs access to revisit and adjust evaluation content following review and feedback from the Dean. DHs receive an email notification when an evaluation enters this queue, including a direct link to the evaluation in workflow. Within this queue, DHs have access to modify all content in the evaluation, including faculty-submitted content. Note that DHs should not change faculty-submitted content without explicitly alerting the faculty to such changes.

Two user actions are available to the DH in this queue, one for initiating an email notification to the faculty and one for routing the finalized evaluation to the faculty for signature:



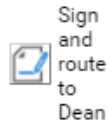
- Pre-meeting: Email the finalized evaluation
  - After making any necessary adjustments to the evaluation and prior to meeting with the faculty member to review, the DH should select this user action to provide the faculty with read-only access to the evaluation. The faculty will receive an email notification (copying the DH) linking to the read-only copy of the evaluation. The evaluation remains in the *Dept Head finalize Evaluation Queue* during this process.
  - During or following the evaluation review meeting between the faculty and DH, the DH retains permissions to make any needed changes to the document. The faculty member should be alerted to any changes made.
- Post-meeting: Route to faculty for signature
  - Once the evaluation form is finalized, the DH should select this user action to route the finalized evaluation to the faculty member for their signature and, if desired, their inclusion of a rebuttal.

# OnBase Quick Reference Guide

## AA1: Dept Head Evaluation Signature Queue

The *Dept Head Evaluation Signature Queue* is at the end of the process flow and provides the DH access to sign the finalized evaluation following the faculty member's signature and submission. The DH will receive an email notification once an evaluation enters this queue, including a direct link to the evaluation in workflow. In this queue, all evaluation data is read-only and the DH is required only to sign and route the evaluation to the Dean.

The DH can select the signature check-box to sign and automatically timestamp the form and then save the signed form before submitting. Or the DH can simply submit the form by selecting the following user-action.



### A. Sign and route to Dean

- Selecting this user action will route the DH-signed form to the Dean. If the form has not been signed by the DH, this user action will automatically sign the evaluation for the DH and provide a timestamp before submitting it to the Dean for their signature.