# Department Head Access and Initial Review and Submission of the Faculty Evaluation and Workflow

This guide instructs Department Heads on how to access the Academic Faculty Evaluation form and associated workflow queues via Trailhead, using the OnBase Web Client.

## Accessing Submission of Faculty Evaluation from Email Notification

The DH receives an email notification once a faculty member submits their completed evaluation.

1. Either click or copy and paste the link provided into your browser to navigate to the evaluation form.
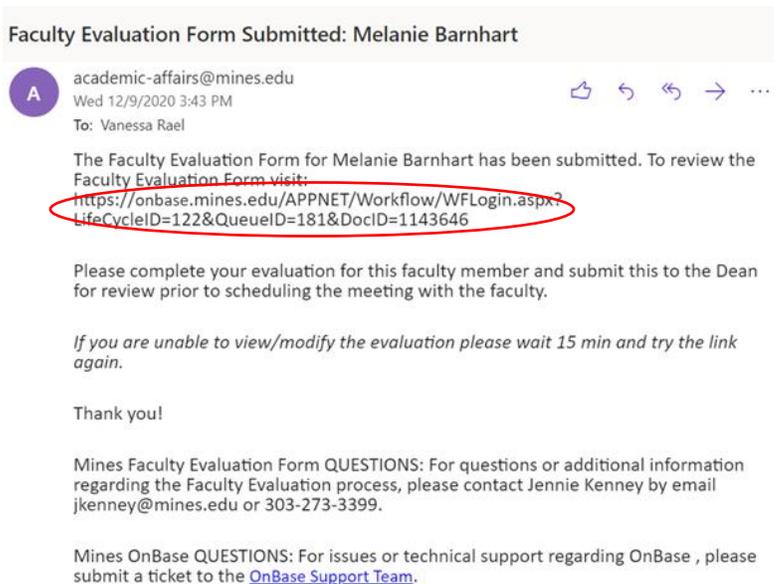


2. At the prompt, log into OnBase using your Multipass credentials.
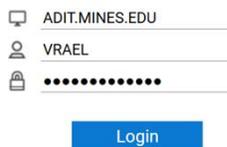
3. Once in OnBase, the faculty member's evaluation should appear as a highlighted file in the upper right navigation window and as an opened form in the lower window:
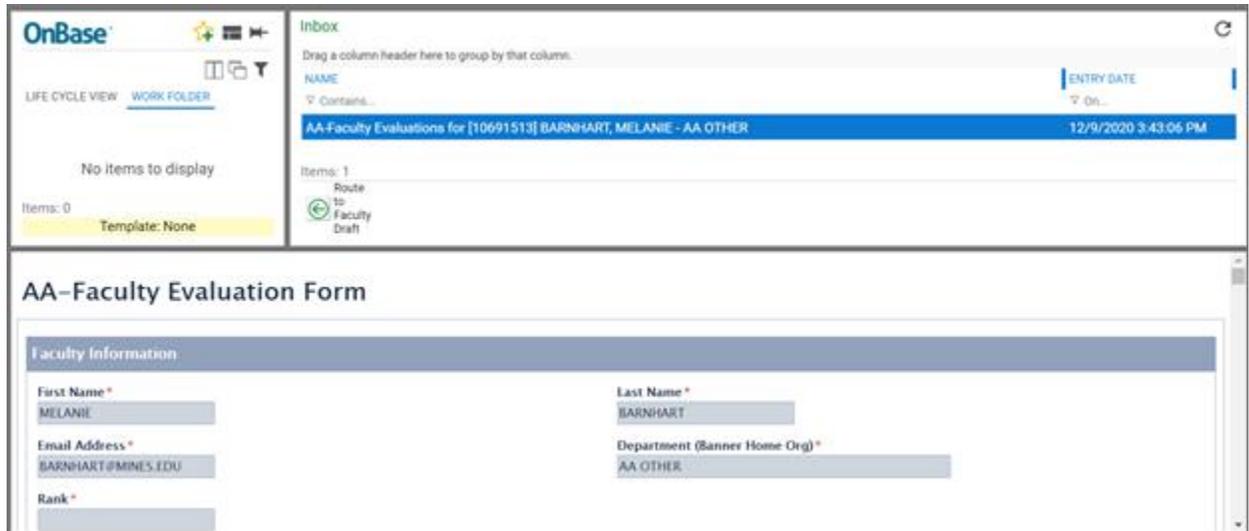


4. Use the lower window to navigate the form. All faculty-submitted information should be visible, including attachments. Additionally, the DH assessment rating drop-down menus and comment boxes should be available for adding content or editing.

## Routing Draft Evaluation Back to Faculty if Incomplete

1. If review of the draft evaluation indicates it is not fully complete (i.e. required attachments are missing, Conflict-of-Interest box is not checked, etc.), it is possible to return the evaluation form to the faculty member by clicking on the "Route to Faculty Draft" user-action button located above the evaluation toward the middle of the screen:
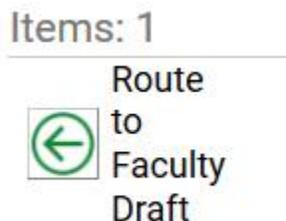
2. A prompt will invite you to provide a reason for returning the draft evaluation form:



3. After entering the reason for returning the evaluation form, click "Submit." This will re-route the form back to the faculty member and automatically send an email notification to the faculty indicating the form has been returned and include the reason specified.)

4. NOTE: After clicking "Submit," the evaluation will still appear on your screen even though you no longer have permissions to make changes. To refresh the list of evaluations, do not click the refresh circular arrow in the upper right. Instead, click the "Life Cycle View" option circled in the screen shot below:
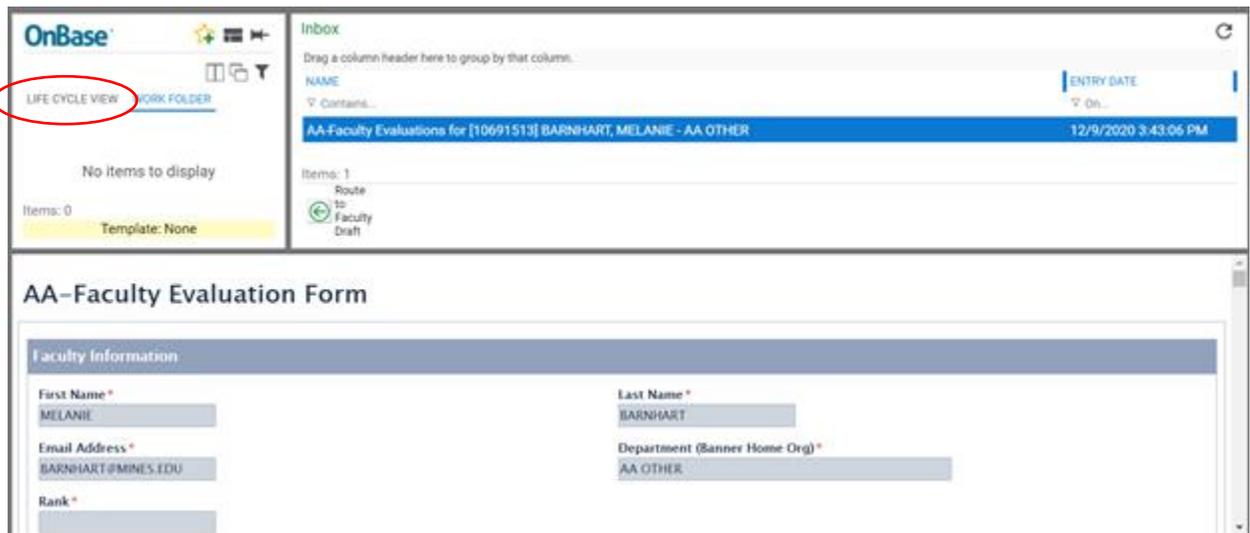


5. Then select the "AA1 Department Head Draft Evaluation Queue" (highlighted in yellow below). This will provide an updated list of all of the faculty evaluations in your queue that are available for reviewing, and it will remove the evaluation returned to the faculty member for correction in step 3 above.

6. Once the faculty member corrects the returned evaluation form and resubmits it, the DH will receive the same email notification as following the original submission, which will include a link to the revised evaluation form. Additionally, the form will now be in the "Dept Head Draft Evaluation Queue" for direct access via OnBase.

## Completing Draft Evaluation of Faculty Member for Dean Review

1. Enter the Dean for your portfolio. Entering the last name (or portion thereof) and pressing search will identify all matches for selection.
2. Complete the DH Assessment Rating and associated comment box for each category—Teaching, Scholarship, and Service—justifying the assessment rating you've selected for that category.
3. Complete the DH Overall Assessment Rating and associated comment box.
4. Once all of those required fields have been completed, click the "Save Evaluation" button at the bottom of the form:



5. Upon clicking the "Save Evaluation" button, a pop-up window will indicate the form is being saved:



6. Once the form is saved, click the refresh icon (circled in the image below) and a new user action will appear above the evaluation: "Route Eval to Dean." Click this user-action button to route the evaluation to the Dean:



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7. Once the form has been routed to the Dean, the evaluation will still appear on your screen even though you no longer have permissions to make changes. To refresh your screen, follow steps 4 – 6 in the **Routing Draft Evaluation Back to Faculty** section above. You'll want to repeat the steps above in terms of clicking the "Life Cycle View" in the top, left-hand corner of your screen and then selecting the "AA1 Department Head Draft Evaluation Queue" in order to refresh the evaluations currently in your queue waiting to be reviewed.