CUMULATIVE PERIODIC EVALUATION GUIDELINES

Cumulative Periodic Evaluation Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
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<tbody>
<tr>
<td>14 days after start of semester</td>
<td>Deadline for notification of temporary faculty of evaluation procedures and criteria.</td>
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*Academic units shall be responsible for establishing all other internal deadlines.*

<table>
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<tr>
<th>March 21</th>
<th>Deadline for completion of <em>Cumulative Periodic Evaluation Cover Sheet and Record</em> by department/school peer review committees and chairs/directors.</th>
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<tbody>
<tr>
<td>April 18</td>
<td>Deadline for completion of <em>Cumulative Periodic Evaluation Cover Sheet and Record</em> by all levels of review.</td>
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General Procedure Overview:

1. Department coordinator (or appropriate personnel) will initiate the *Cumulative Periodic Evaluation Cover Sheet and Record* in EchoSign. Please note this is the only individual that will need a login for EchoSign.

2. The temporary faculty member will receive an email prompt to fill out, upload required materials, date and sign Section A. Prepare all materials prior to uploading; it is not possible to save and return for later additions.

3. Once Section A is completed, the department/school peer review committee will receive email prompts. All committee members will be able to view the document and materials uploaded by the faculty member. Once the committee has conducted their review, the committee chair will be able to complete, date and sign Section B of the form.

4. Once Section B is completed, the form and all materials are routed to the department chair/school director. When the chair/director has reviewed the form and attached materials, s/he is to complete, date and sign Section C of the form.

5. The form is routed back to the temporary faculty member to complete, date and sign Section D. This must be completed within 10 days following receipt of the department chair/school director and department peer review committee evaluation.

6. Once Section D is completed, the form and all materials are routed to the college dean. When the dean has reviewed the form and attached materials, s/he is to complete, date and sign Section E of the form.
7. The form is routed back to the temporary faculty member to complete, date and sign Section F. This must be completed within 10 days following receipt of the dean’s evaluation.

8. The *Cumulative Periodic Evaluation Cover Sheet and Record* is complete and must be printed and filed in the faculty member’s official Personnel Action File.

**Adobe EchoSign Procedures**

❖ **Steps for Department Coordinators (or appropriate personnel)**

**STEP 1:** Department/school coordinators will need an Adobe EchoSign account. If you do not yet have an account, please visit the [ETS Help Desk](#) to request access and to see more information, including step-by-step guides, regarding this system.

**STEP 2:** [Login](#) to your Adobe EchoSign account.

**STEP 3:** On the welcome page, click the “Select a Document” dropdown menu under the “Get a Signature” heading. Select the *FA - Cumulative Periodic Evaluation Cover Sheet and Record* and click the “Start” button.
STEP 4:

Each temporary faculty member to be reviewed must be entered separately into Adobe EchoSign.

Enter email addresses in the following order:

1. Faculty Member
2. Department Peer Review Committee Chair
3. Department Chair/School Director
4. Faculty Member
5. College Dean
6. Faculty Member
STEP 5: Open the Cc field by selecting “Show Cc”.

Enter the emails for the remaining department/school peer review committee members; this will allow them to view the temporary faculty member’s form and attachments. The College RTP Representative must also be entered into the Cc field.

STEP 6: The “Recipients sign in” section should be selected as “Order Entered”. This will ensure that each level is completed before being routed to the next.
STEP 7: When all steps have been completed, select the “Send” button and the form will be sent.

The “Manage” tab (see next page) allows department/school coordinators to track each document sent. As each level of the process is completed, the coordinator will receive a notification. Completion reminders can be sent within Adobe EchoSign by accessing the form in the “Out for Signature” dropdown and selecting “Remind” in the vertical column on the right of the screen.
Steps for Temporary Faculty

Temporary faculty do not need an Adobe EchoSign account to complete the Annual Periodic Evaluation Cover Sheet and Record.

Please follow this link to view a sample Cumulative Periodic Evaluation Cover Sheet and Record.

STEP 1: Temporary faculty will receive an email prompting them to complete Section A of the form. Enter the appropriate information for the evaluation period.

STEP 2: All materials are to be uploaded into Adobe EchoSign by selecting “Click...” on the right of the corresponding item. Please refer to your department guidelines for required materials. Only one file can be uploaded per attachment link; consolidate files if necessary. All file types are accepted.

STEP 3: Once the form has been completed, materials uploaded, dated and signed, select the “Click to Sign” button. This will forward the form and all attached materials to the department/school peer review committee.

STEP 4: When the department levels of review have completed their evaluation, the faculty member will receive an email prompt. The faculty member is to complete, date and sign Section D within 10 days of the email prompt. Select the “Click to Sign” button. This will forward the form and all attached materials to the next level of evaluation.
STEP 5: When the college dean has completed his/her evaluation, the faculty member will receive an email prompt. The faculty member is to complete, date and sign Section F within 10 days of the email prompt. Select the “Click to Sign” button.

❖ Steps for Department/School Peer Review Committee Chairs & Members

Department/school committee chairs and members do not need an Adobe EchoSign account to access/complete the Cumulative Periodic Evaluation Cover Sheet and Record.

Please follow this link to view a sample Cumulative Periodic Evaluation Cover Sheet and Record.

STEP 1: When the temporary faculty member has completed Section A, committee chairs and members will receive an email prompt. The peer review committee members will have access to view the temporary faculty member's form and materials (accessed by scrolling to the bottom of the document). The peer review committee chair is the only member with access to complete and sign Section B of the form.

STEP 2: Once the committee has reviewed the temporary faculty member's form and attached materials, the committee chair is to complete, date and sign. Select the “Click to Sign” button to forward the form and all attached materials to the next level of evaluation.

❖ Steps for Department Chairs/School Directors

Department chairs/school directors do not need an Adobe EchoSign account to complete the Cumulative Periodic Evaluation Cover Sheet and Record.

Please follow this link to view a sample Cumulative Periodic Evaluation Cover Sheet and Record.

STEP 1: When Sections A - B are completed, department chairs/school directors will receive an email prompting them to complete Section C of the form.

STEP 2: Once the chair/director has reviewed the temporary faculty member's form and attached materials (accessed by scrolling to the bottom of the document), s/he is to complete, date and sign. Select the “Click to Sign” button to forward the form and all attached materials to the next level of evaluation.
❖ Steps for College Deans

Please follow this link to view a sample Cumulative Periodic Evaluation Cover Sheet and Record.

Deans do not need an Adobe EchoSign account to complete the Cumulative Periodic Evaluation Cover Sheet and Record.

STEP 1: When Sections A - D are completed, college deans will receive an email prompting them to complete Section E of the form.

STEP 2: Once the dean has reviewed the temporary faculty member’s form and attached materials, (accessed by scrolling to the bottom of the document), they are to complete, date and sign. Select the “Click to Sign” button.

❖ When all levels of the evaluation form have been completed, all parties will receive an email that contains a PDF of the completed document. The Office of Faculty Advancement must also receive a copy of the completed evaluation; the department/school coordinator may either forward a copy via the Adobe EchoSign “Share” feature or by sending an email to facultyaffairs@mail.sdsu.edu. The “Share” feature can be accessed by navigating to the “Manage” tab, selecting the evaluation from the “Signed” drop-down menu and clicking “Share” on the vertical column on the right of the page.

The final electronically signed copy of the Cumulative Periodic Evaluation Cover Sheet and Record must be printed and filed in the faculty member’s official Personnel Action File.
Additional Steps

Replace a Signer

In the event a faculty member exceeds the 10 response/rebuttal period, the initiator/department coordinator can bypass that step by doing the following:

**STEP 1:** Go to the Manage tab; find the pending document in the “Out for Signature” section, select it, and in the box to the right of that section, scroll to the bottom and click “Replace Signer”.

**STEP 2:** Replace signer with facultyaffairs@mail.sdsu.edu. In the message box type “Expiration of 10 day response/rebuttal period.” Click “Replace Signer”. Faculty Advancement will bypass response/rebuttal.
Decline to Sign

In the event a level of review discovers an error or incomplete portions of the faculty member’s form or materials, that level of review may decline to sign and the faculty member will be instructed to revise as instructed.

STEP 1:  On the reviewer's signing screen, in the top left corner, use the Options dropdown menu to select “I will not e sign”.

STEP 2:  A pop-up window will appear to provide a reason for declining the signature; include a reasons stating, “The record is being returned for revision due to ________.” Department coordinator will receive an email of the canceled record. The record will need to be reinitiated and revised as instructed.