

Part 2: Moving Cases to Department Review

*Scott Nguyen
Faculty Services
University Personnel*

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Required Documents

As a reminder, this is a snapshot of the list of [Required Documents](#) that faculty are responsible for submitting as part of their **Annual and/or Cumulative Evaluation**.

Per **Article 15.12(a) of the CSU–CFA Agreement**, departments are responsible for providing any required materials that are not accessible to the employee. This often includes providing the official **direct observation of teaching** to the faculty member so it can be uploaded.

If assistance is needed, please contact **Faculty Services. Scott Nguyen**, Temporary Faculty Evaluations Analyst, is the primary contact:

✉ Scott.nguyen01@sjsu.edu
 Please cc: ✉ eFaculty@sjsu.edu
 ☎ 4-2204

The **Faculty Services monitored inbox** is the preferred point of contact. Faculty should always be instructed to send requests to:

✉ eFaculty@sjsu.edu

What to Submit

Where to Submit it

Annual Evaluation - eFaculty Placement

Item	Enter or Upload to This Activities Tab...
1. Annual Summary of Achievements - Lecturers/Librarians (ASA-L)	Review: Annual/Cumulative Evaluation of Lecturers
2. All SOTEs for prior calendar year; Syllabus for each course taught; other evidence of teaching effectiveness	Classes Taught at SJSU, SOTE/SOLATEs, Syllabi, etc. and/or Additional Courses and Student Evaluations <i>SOTE/SOLATEs from Spring 2013 to present are preloaded to these sections</i>
3. All Direct Observations of Teaching (peer evaluation) from the prior year	Direct Observations of Teaching
4. Any other department evaluations or evidence of performance in assignment	Choose tab as appropriate to tab's description

Cumulative Evaluation - eFaculty Placement

Item	Enter or Upload to This Activities Tab...
1. All prior reviews including ASAs and evaluator comments. <i>Note: Faculty undergoing concurrent Annual Evaluation should note the date to upload Department Level Evaluation(s) and any Optional Response to F180, Activities Tab, "Prior Evaluations and Reviews"</i>	Prior Evaluations and Reviews
2. All SOTEs from period of review; Syllabus for each course (title) taught; other evidence of teaching effectiveness	Classes Taught at SJSU, SOTE/SOLATEs, Syllabi, etc. and/or Additional Courses and Student Evaluations <i>SOTE/SOLATEs from Spring 2013 to present are preloaded to these sections</i>
3. All Direct Observations of Teaching (peer evaluation) from the period of review	Direct Observations of Teaching
4. Any other department evaluations or evidence of performance in assignment	Choose tab as appropriate to tab description

Document Verification

- Faculty are responsible for uploading all documents; however, they may contact their department and/or **eFaculty@sjsu.edu** for assistance if needed.
- Department Administrators and Chairs assist faculty in ensuring that all required documents have been submitted.

Faculty Case Submission

- Please ensure that all packets are **regenerated and submitted by the faculty**. Once submitted, packets must be **locked**.
- If a faculty member is unable to regenerate or submit their packet, the department/efaculty may assist with this process to ensure submission by the due date.
- Please note that packets that are **not regenerated will not include the most recent documents** from the “Activities” section.



What Do Faculty Need Before Cases Can Be Moved Forward?

Have all required documents been submitted?

- ASA-L
- SOTEs/SOLATEs
- Syllabi
- Direct Observations of Teaching

Has the faculty member regenerated their case?

Faculty should regenerate their case to ensure all uploaded documents are included.

Has the faculty member submitted the case?

Faculty must click “**Submit**” to lock the case.

Can a case be regenerated after submission?

Once cases are forwarded for review, they **cannot be regenerated**. Faculty may regenerate their case **up until the submission due date**.

What Do Department Administrators and Chairs Do to Assist?

Verify required documents have been submitted

- Review cases to confirm all required documents are included.
- If documents are missing, reach out to the faculty member.
- Common missing items include SOTEs/SOLATEs, syllabi, or Direct Observations of Teaching.
- Faculty should be advised to enter a note explaining why any required documents are missing.

If the faculty member did not regenerate their case

- Yes, you may regenerate the case on their behalf **up until the submission due date**.
- **Regeneration is not permitted after the submission due date.**
- Faculty should regenerate their case to ensure all documents are included; if they do not, please regenerate for them.

If the faculty member forgot to submit their case

- Yes, you may submit the case on the faculty member’s behalf.



What should the case look like before moving

Please Ensure the Following Before Sending Cases Forward

- Confirm the **correct faculty member**.
- Confirm the **correct unit**.
- Confirm the case has been **regenerated**.
- Ensure the **Faculty180 Vita and all other documents are locked**. If any documents are unlocked, please lock the packet.

San José State University > Cases >

Sammy Spartan

Send Case ▾ Case Options ▾

Unit: Accounting & Finance

Template: Annual Evaluation (Committee) - College of Business - Accounting and Finance

Status: Select Status

Case Materials Case Details

Search case materials by title

Expand All Collapse All Share Settings Move

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

Title	Details	Actions
<input type="checkbox"/> Faculty180 Vita	Annual/Cumulative Evaluations Spring 2024 - Fall 2025 4 attachments included	Generated Aug 5, 2025
<input type="checkbox"/> Other Documents (Optional)		

Additional Documents optional

No files have been submitted.

Once all items above have been verified, **send the case forward for review.**



READ CASE: What to look for

Sammy Spartan
 Spring 2024 - Fall 2025
 Annual/Cumulative Evaluations
 Assistant Professor
 sammy.spartan@sjsu.edu

Review: Annual/Cumulative Evaluations

Spring 2025 - Fall 2025

Full Name: Sammy Spartan, ID Number: 000000001

Spring 2024 - Fall 2024

Prior Evaluations and Reviews

Spring 2024 - Fall 2024

Direct Observations of Teaching

Fall 2025

Course Prefix: Acct 21, Course Number: 101, Course Title: Intro to Accounting, Credit Hours: 3, Enrollment: 25, Modality: In-Person

Research, Scholarship, and Creative Activity (RSCA)

Patent

Wymer, Scott A. 2014. Application of Electromagnetic Scattering Methods to Stokesian Flow Around a Stationary Body. issued 2014.

Grants

Funded - In Progress

This is an example of a Sammy who added their ASA-L directly onto the faculty180 Website, and no ASA-L document was uploaded.

Sammy Spartan

☰

Packet Annotations

▼ FACULTY180 VITAE

Annual/Cumulative Evaluations

▼ Attachments from Annual/Cumulative Evaluations

- ▶ Review: Annual/Cumulative Evaluations
- ▼ Prior Evaluations and Reviews
 - [UPFA Temporary Faculty - Annual Evaluation - 000000001 - Sammy Spartan - 2024.pdf](#)
- ▼ Direct Observations of Teaching
 - [Peer Review -Fall 2024 - Sammy Spartan.docx](#)
- ▶ Research, Scholarship, and Creative Activity (RSCA)

▶ OTHER DOCUMENTS (OPTIONAL)

▶ DEPARTMENT ASSISTED DOCUMENT UPLOAD

▶ DEPARTMENT COMMITTEE

▶ DEPARTMENT CHAIR

▶ DEAN OR APPROPRIATE ADMINISTRATOR

▶ FACULTY SERVICES

You can see here.

Review: Annual/Cumulative Review. - No document listed, since Sammy directed added it to Faculty 180.

I see the SOTEs and the Direct Observations of Teaching documents uploaded.

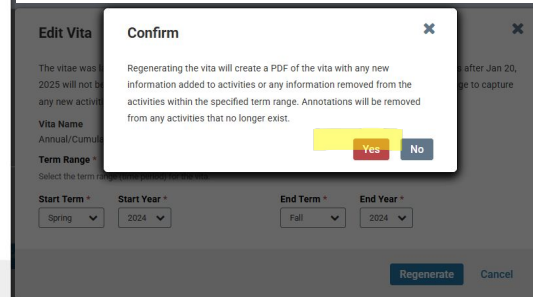
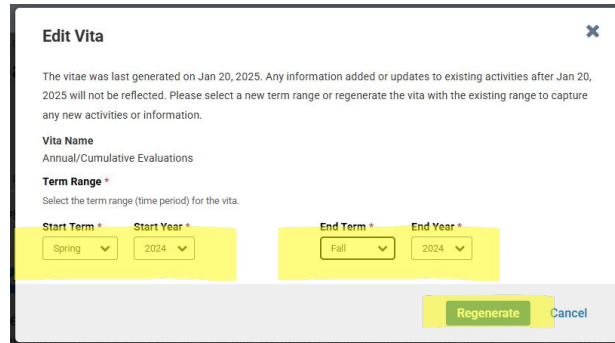
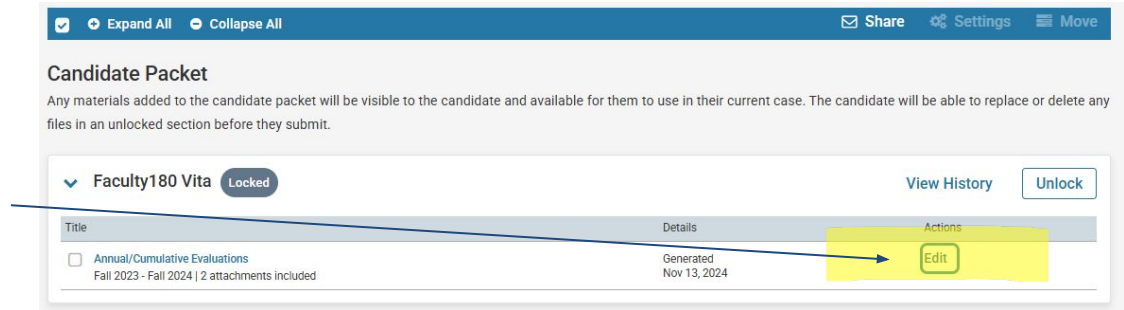
We want to ensure all of the required materials are submitted before sending to the next step.



How to Regenerate for faculty

How to Regenerate for Faculty

- Navigate to the faculty member’s case.
- Click “**Edit**” in the **Faculty180 Vita** section.
- A pop-up window will appear showing the **period of review**.
 - Confirm that the **Start Term/Year** and **End Term/Year** are correct.
 - RPT will retrieve all documents that are **date-stamped within the selected term range**.
- Click “**Regenerate**”, then select “**Yes**” to confirm.
- After confirming, **refresh your browser**. The regeneration process should now be complete.



- **Once all cases have been regenerated, they must be locked and advanced to the next step.**



How to Regenerate for faculty

ATTENTION

Do **NOT** regenerate faculty packets once a case has been moved to review or after the submission due date.

Regeneration of **Annual and Cumulative Evaluation** cases is prohibited after submission or once a case enters review, unless explicitly authorized by Faculty Services.

Staff are instructed to manage cases in eFaculty only when asked to do so by Faculty Services (and never manage cases in RTP, Mini Review, or Post Tenure Review).

- CFA-CSU Collective Bargaining Agreement establishes uniform timelines for all evaluations.
- “Regenerating” after the packet is under review jeopardizes the integrity of the evaluation of the case.



- Navigate to **one.sjsu.edu**.
- Log in using your credentials.
- Select the **eFaculty** tile.



- From here, you can access the **Annual and Cumulative cases** you have created.
- Select **“Cases”** to view all available cases, or
- Click on a case from your landing page to view the faculty record

A screenshot of the SJSU eFACULTY web interface. The page header shows 'SJSU | eFACULTY' and the user 'Scott Nguyen'. A navigation menu on the left includes 'Home', 'Announcements & Help', 'Evaluations', 'Administration', 'Review, Promotion and Tenure', 'Cases', 'Templates', 'Administration', 'Reports', and 'Users & Groups'. The 'Cases' menu item is highlighted in yellow. The main content area shows 'My Tasks' with a count of 54 unread tasks and 0 read tasks. Below this is a table of cases with columns for 'Title' and 'Due Date'. The table contains five rows of case data, all highlighted in yellow. The footer includes '© 2025 Elsevier Inc.', 'Privacy Policy', and 'Cookie Notice'.

Title	Due Date
Craig England Chemical & Materials Engr Review Lecturer Range Elevation - College of Engineering	Mar 7, 2025
Igor Tyukhov Interdisciplinary Engineering Review Lecturer Range Elevation - College of Engineering	Mar 7, 2025
Susan Trimmingham Art and Art History Review Lecturer Range Elevation - College of Humanities and The Arts	Mar 7, 2025
David Williams Kinesiology Review Lecturer Range Elevation - College of Health and Human Sciences	Mar 7, 2025
John Todd	Mar 7, 2025



The screenshot shows the SJSU eFACULTY interface. At the top, there's a search bar with 'sammy' entered and a 'Filter' button. Below the search bar, there are action buttons: 'Notify Candidates', 'Send Backward', 'Send Forward' (highlighted in yellow), 'Close Cases', and 'More Options'. A table below shows two cases:

Name	Type	Template Name	Status
<input checked="" type="checkbox"/> sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 1 of 4: Department Assistance Jan 31, 2025			
<input checked="" type="checkbox"/> sammy spartan Applied Data Science	Review	Mini Review of Probationary Faculty	
Step 1 of 5: Faculty Services Admin Step			

Note:

Only select (check) **Reappointment cases** that are ready to be moved forward.

In the example above, you would move forward **only the Reappointment/Annual case** at the “**Department Assistance**” step.

Please verify the **case type** before sending it forward. If the case type is incorrect, **deselect the case** before proceeding.



To Send a Case Forward

- Once you have located the faculty case you want to move forward, **check the box** to the left of the faculty member’s name.
- After selecting the case, click “**Send Forward.**”
- The “**Send Case Forward**” screen will appear.

CAUTION:

Send forward **only Temporary Faculty cases** and ensure the **correct case type** is selected before proceeding.

Please enter the appropriate **email subject**:

- **Annual Evaluation Case Is Available for Review**
- **Cumulative Evaluation Case Is Available for Review**

Please enter the message using the **templates provided in the slides**, or feel free to use your own template to notify the faculty member.

Send Cases Forward

Please confirm you wish to send the following cases forward to the next step in the review process.

- sammy spartan is moving forward to "Department Level"
- sammy spartan is moving forward to "Department Level"

Send a message to the reviewers gaining access.
If recipients respond to this message, their response will come directly to your email inbox.

Subject *
Annual Evaluation Case is available for Review

Message *

Dear Committee Members,

This evaluation is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in. For help [initiating](#) your review, please visit our reviewer's guide, our eFaculty Training and Help page, or the help pages under your name in the extreme upper right corner of your eFaculty account. If the wrong faculty member is

[Preview](#) [Send](#) [Cancel](#)



Alternatively, you may send cases forward from within the case.

To Move a Case Forward

- Navigate to the **top-right corner** of the case.
- Select **“Send Case.”**
- Choose **“Forward to Department Review.”**
- This will open the **“Send Case Forward”** screen.

Please refer to the **previous slides** for the email templates.

The screenshot displays the SJSU eFACULTY interface for a case titled "sammy spartan". The user is logged in as Scott Nguyen. The interface includes a navigation menu on the left with categories like Home, Faculty180, Announcements & Help, Evaluations, Administration, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area shows case details for "sammy spartan" in the Accounting & Finance unit, with a template of "Annual Evaluation (Committee) - College of Business - Accounting and Finance". A "Send Case" dropdown menu is highlighted, with "Forward to Department Level" selected. Below this, there is a "Read Case" button and a "Candidate Packet" section. A modal window titled "Send Cases Forward" is open, showing a confirmation message: "sammy spartan is moving forward to 'Department Level'". It includes a checkbox for "Send a message to the reviewers gaining access." and a "Subject" field with the text "Annual Evaluation Case is available for Review". The modal also contains a "Message" field and "Send" and "Cancel" buttons. A blue arrow points from the text "Please refer to the previous slides for the email templates." to the "Message" field in the modal.



Sending the case to the Reviewers for Annual or Cumulative Evaluation

Subject: Annual Evaluation Case is available for Review

Message:

Dear Committee Members, Chair: (This vary, depending on the Faculty and Committee type)

This evaluation is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in. For help initiating your review, please visit our [reviewers guide](#), our [eFaculty Training and Help](#) page, or the help pages under your name in the extreme upper right corner of your eFaculty account. If the wrong faculty member is designated chair, they may assign manager duties to the properly elected chair.

[Link to Template](#)



Sending Cumulative Evaluation to the College Level

Subject: Cumulative Case ready for your Ready

Message:

Dear Committee Members:

This **cumulative** evaluation case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in. For help initiating your review, please visit our [reviewers guide](#), our [eFaculty Training and Help](#) page, or the help pages under your name in the extreme upper right corner of your eFaculty account.

The appropriate administrator must review the faculty member's Personnel Action File (PAF) before making their decision. To review the PAF:

1. Follow the link to the PAF Log Sheet available in Case Materials. Submit your view of the PAF in the OnBase form that opens. Instructions for logging your view of the PAF are available [here](#).
2. For your convenience, the PAF has been uploaded to this case in eFaculty under the area named Dean or Appropriate Administrator--the file name begins with, "UP Personnel Packet."

After reviewing the Cumulative Evaluation materials and the PAF, please complete the evaluation form under "Case Details" (Annual Evaluation Form - Dean).

[Link to Template](#)



Once the case has been successfully moved forward, you will see that it has updated to the new step.

At this time, all cases should be moved from **Step 1 to Step 2** to provide **department reviewers** access to the case.

Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<input type="checkbox"/> sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 1 of 4: Department Assistance Jan 31, 2025			

Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<input type="checkbox"/> sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level Feb 26, 2025 ⚠ Required Documents			



Once the **review and confidentiality agreement forms** are signed and submitted, evaluations may be shared with faculty.

Departments will share the following with faculty:

- **Department-level review**

Departments must provide faculty with a **10 Day optional response window**. Please refer to the calendar for the **Optional Response Due Date**.

NOTE:

If there is any delay in issuing department evaluations, contact **Faculty Services immediately** at **eFaculty@sjsu.edu**.

Once the **10-day optional response period has passed**, packets may be moved forward to the **College-level review**.

Important:

The **College review is final**, and faculty will **not** have an opportunity to submit an additional 10-day optional response at that stage. Faculty should be informed that if they wish to submit a rebuttal, it **must be done during the Department-level review**.

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

> Department Assisted Document Upload

Edit

Add File

▼ Department Committee

Edit

Add File

Materials

Title	Details	Actions
<input type="checkbox"/> Annual Evaluation Review by Scott Nguyen	Added by Scott Nguyen Jan 27, 2025	Edit

> Department Chair

Edit

Add File

> Dean or Appropriate Administrator

Edit

Add File

> Faculty Services

Edit

Add File



During this phase, cases will be moved:

From Step 2: Department-Level Review

Submission Date:

Please refer to the calendar for the due date. All **reviews and confidentiality agreement forms** must be **signed and submitted** before a case can be moved to the next step.

If these required documents are not present, you will **not** be allowed to move the case forward.

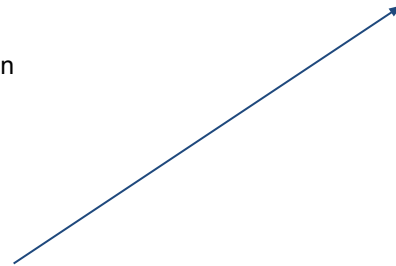
If required forms are missing, a “**Required Documents**” notification will appear indicating which items are outstanding.

Cases with missing reviews **cannot advance**.

To Step 3: Dean or Appropriate Administrator Review

If all required forms have been submitted, you will be able to move the case forward to **Step 3**.

Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<input type="checkbox"/> sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 2 of 4: Department Level Feb 26, 2025 ▲ Required Documents			



Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<input type="checkbox"/> sammy spartan Accounting & Finance	Reappointment	Annual Evaluation (Committee) - College of Business - Accounting and Finance	
Step 3 of 4: Dean or Appropriate Administrator Apr 8, 2025			



To Share Documents

- Click the **checkbox** next to the document you wish to share with the faculty member.
- Once the document is selected, click **“Share”** located in the **blue bar**.
- Select **“With Candidate.”**
- You will then be taken to the next page.

The screenshot shows a document management interface. At the top, there is a blue bar with 'Expand All' and 'Collapse All' options, and a green 'Share' button with an envelope icon. Below this, there are two yellow dropdown menus: 'With Candidate' and 'With Committee Members'. The main content area is titled 'Internal Sections' and contains two sections: 'Department Assisted Document Upload' and 'Department Committee'. Each section has 'Edit' and 'Add File' buttons. Under 'Department Committee', there is a 'Materials' table with one row: 'Annual Evaluation Review by Scott Nguyen', which has a checked checkbox, a 'Details' column showing 'Added by Scott Nguyen Jan 27, 2025', and an 'Edit' button in the 'Actions' column. Blue arrows point from the text instructions to the checkbox, the 'Share' button, and the 'With Candidate' dropdown.

Title	Details	Actions
<input checked="" type="checkbox"/> Annual Evaluation Review by Scott Nguyen	Added by Scott Nguyen Jan 27, 2025	Edit



- Paste the **email subject** and **message text** into the body.
- Enable **“File Response”** to allow the faculty member to submit a response.
- **Deadline:** Please refer to the calendar for the due date.

Message to Candidate

To
sammy spartan (sammy.spartan@sjsu.edu)

Subject *
10-Day Optional Response - Annual Evaluation

Message *


Dear Faculty Member,

The department has concluded its review of your range elevation application. Their recommendation is attached. You have 10 days to provide an optional response. If responding, please submit by Monday, March 10, 2025. If you do not respond, the case will still be moved forward. The link above will not work for sign-on unless you are already signed in to your faculty account—visit one.SJSU.edu.

Pursuant to Provision 15.5 of the CSU-CFA Collective Bargaining Agreement, responses may not add new items to the range elevation packet. Responses that include new information or new evidence will be removed from the packet by Faculty Services and will not be seen by reviewers.

Optional Responses shall be limited to a statement that focuses primarily on one or more of the following:

body p strong

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

Annual Evaluation Review by Scott Nguyen

Preview

Details

Direct email reply:
scott.nguyen01@sjsu.edu

File Response:

Enable

When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

Message Reason

10-Day Optional Response

Deadline

Mar 10, 2025

Section for Response *

Department Chair

Send Cancel



Section for Response:

- **Department Chair**, if the Chair evaluated separately, or
- **Department Committee**, if the Chair did not review separately.
-

Sending Annual Evaluation to the Candidate for 10 Day Optional Response -

Dear Faculty Member:

The department has concluded its review of your **Annual** Evaluation. Their recommendation form and memo are attached. **You have 10 days to provide an optional response. If responding, please submit by (Please review Calendar for 10-optional response Due Date).** If you do not respond, the case will still be moved forward. You may expedite the review by notifying your Dept. admin and Faculty Services (eFaculty@sjsu.edu) that you will not be submitting a response.

Pursuant to Provision 15.5 of the CSU-CFA Collective Bargaining Agreement, Optional Responses shall be limited to a statement. **Responses may not add new review materials.** Responses that include new information or new evidence **will be removed from the packet** by Faculty Services and will not be seen by reviewers.

Optional Responses shall be limited to a statement. Typically, issues such the following are addressed:

Explanation of your disagreement with evaluations

Correcting errors

Pointing out evidence in the dossier that was overlooked by reviewers

While your statement will center on evaluations from the college level of review, your intended audience shall be those at the next level of review who will receive the dossier next.

Please note that the link above will not work for sign on unless you are already signed in to your eFaculty account--visit one.SJSU.edu. Please see this help guide for submitting a response: <https://product-help.interfolio.com/candidate/view-and-respond-to-files-shared-with-you-by-a-committee-rebuttal>.

[Link to Template](#)

Note: The College Review is final, and faculty will not have the opportunity to submit an optional 10-day response at that stage.

Please inform faculty that if they wish to submit a rebuttal, it must be done during the Department-level review.



Sending Cumulative Evaluation to the Candidate for 10-Day Optional Response -

Dear Faculty Member:

The department has concluded its review of your **Cumulative** Evaluation. Their recommendation form and memo are attached. **You have 10 days to provide an optional response. If responding, please submit by (Please review Calendar for 10-optional response Due Date).** If you do not respond, the case will still be moved forward. You may expedite the review by notifying your Dept. admin and Faculty Services (eFaculty@sjsu.edu) that you will not be submitting a response.

Pursuant to Provision 15.5 of the CSU-CFA Collective Bargaining Agreement, Optional Responses shall be limited to a statement. **Responses may *not* add new review materials.** Responses that include new information or new evidence ***will be removed from the packet*** by Faculty Services and will not be seen by reviewers.

Optional Responses shall be limited to a statement. Typically, issues such the following are addressed:

Explanation of your disagreement with evaluations

Correcting errors

Pointing out evidence in the dossier that was overlooked by reviewers

While your statement will center on evaluations from the college level of review, your intended audience shall be those at the next level of review who will receive the dossier next.

Please note that the link above will not work for sign on unless you are already signed in to your eFaculty account--visit one.sjsu.edu. Please see this help guide for submitting a response: <https://product-help.interfolio.com/candidate/view-and-respond-to-files-shared-with-you-by-a-committee-rebuttal>.

[Link to Template](#)

Note: The College Review is final, and faculty will not have the opportunity to submit an optional 10-day response at that stage. Please inform faculty that if they wish to submit a rebuttal, it must be done during the Department-level review.



Once all of the 10-day optional responses have been sent, please review the calendar to determine the appropriate time to forward the cases to the College-Level Review.

Please also review **Part 3 of the powerpoint** for the College-Level steps.



Questions or need 1 on 1 assistance, please contact:

eFaculty@sjsu.edu

scott.nguyen01@sjsu.edu

[Open Lab Schedule:](#)

Tuesday 2pm-3pm : <https://sjsu.zoom.us/j/83578498656>

Thursday 9am - 10pm : <https://sjsu.zoom.us/j/83578498656>

By Phone: x4-2204

