Lead Staff Instructions to Create Faculty Annual Evaluation Cases in RPT

1  Log into Facet and Click Cases
   Log in at https://emory.edu/facet
   Enter Emory NetID and password
   Under Review, Promotion and Tenure- Click “Cases”

Go to Create Case
On top right drop down, click arrow.
Click “Create multiple cases.”

2  Case Setup
   Under Unit- Select Department Name.
   Under Type of Cases- Select “Review.”
   “Select” Template for Cases for your department.
   Click “Continue.”

3  Select Candidates
   Select “YES” candidates submit materials online.
   Click “Add Candidates.” Select faculty in unit. Click
   “continue.”

4  Summary and Confirmation
   Review details and confirm that dates are correct. Date range should be Summer 2022 to
   Spring 2023.
Under **Notify Candidates** - select “YES.” Enter a subject line, and then copy and paste this text into the message: “This case is being created in order to share your annual merit evaluation with you later this semester. Until then, there is nothing you need to do with this case.”

Click **Create Cases**.

**Send Cases**
On **Cases** page, view list of cases. Check the box to the left of the candidates’ names for the cases you will forward (only those with the template name “ECAS-Department/Program Name” or “Joint Department/Program Names.” Do NOT forward tenure, promotion, or reappointment cases). Once you have checked off all the cases you want to forward, at top of screen, click arrow on “Send Forward.” This will move the case forward to **Department Review**.

Uncheck “**Send a message**”
This is so multiple emails will not be sent to the chair notifying them that cases have been created.
Click “Send.”

**Regenerate Case** (if case was created before faculty activity report submission deadline)
Click into specific faculty member’s case by selecting the name. Click “Edit” on right hand side of page.
Click “Regenerate” and “Yes” to confirm.

For assistance, contact the **Facet Project team** at facet.help@emory.edu or the **ECAS Office of Faculty** at dean_of_faculty@emory.edu.