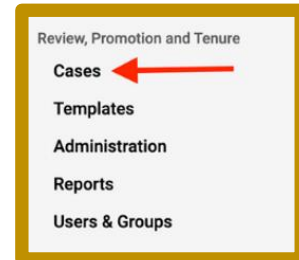




Lead Staff Instructions to Create Faculty Annual Evaluation Cases in RPT

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



- 2 Go to Create Case**
On top right drop down, click arrow.
Click Create multiple cases.



- 3 Case Setup**
Under Unit- Select Department Name
Under Type of Cases- Select Review.
Select Template for Cases for your department.
Select Continue.

1. Case Setup

You can create multiple cases at once. Please make sure you are based on a template that has the correct information, because you cannot make changes to the template during this process.

In which unit would you like to create your cases? *

Anthropology

What type of cases are you creating?

Review

- 4 Select Candidates**
Select YES candidates submit materials online
Add Candidates. Select faculty in unit. Click continue.

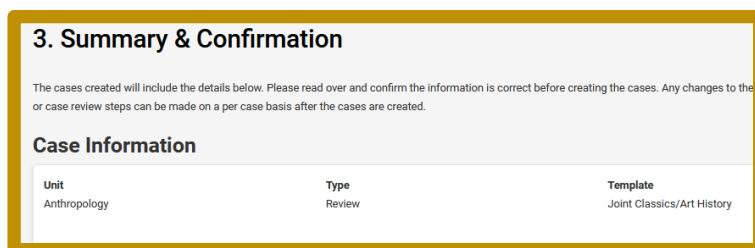
2. Select Candidates

Will the candidate submit their packet?
Choose "Yes" if the candidate will submit materials online. Do not change after the case has been created.

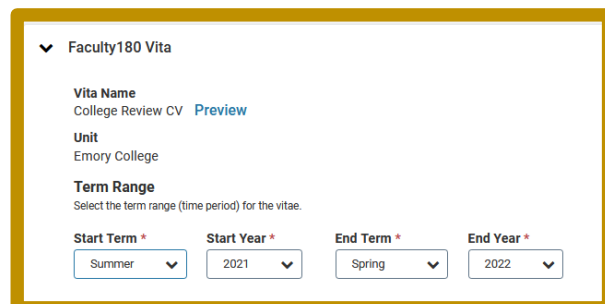
Yes
 No

Add 1 or more candidates

- 5 **Summary and Confirmation**
Review details and confirm that dates are correct. Date range should be Summer 2021 to Spring 2022.

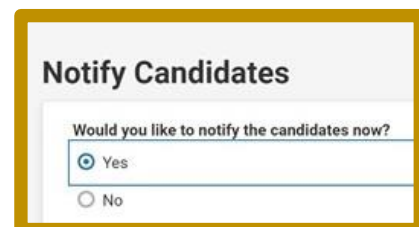
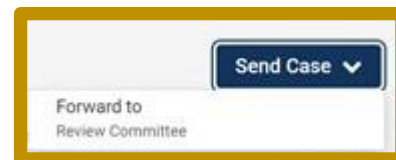


Under Notify Candidates- select YES.
Enter a subject line, and then copy and paste this text into the message: “This case is being created in order to share your annual merit evaluation with you in May. Until then, there is nothing you need to do with this case.”

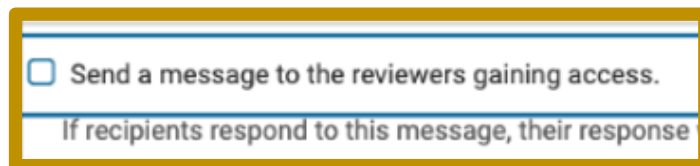


Click Create Case.

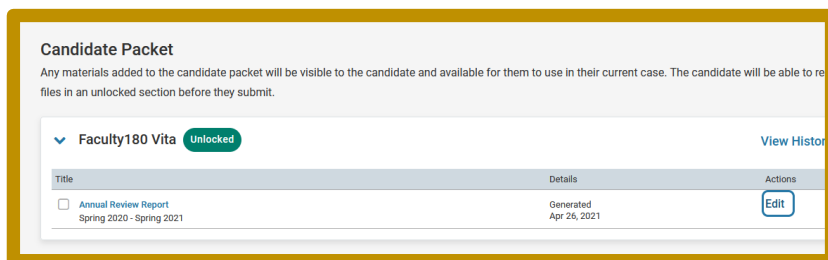
- 6 **Send Case**
On Cases page- view list of cases. Click on Candidate’s name. At top of screen, click arrow on Send Case. Select Forward to Department.

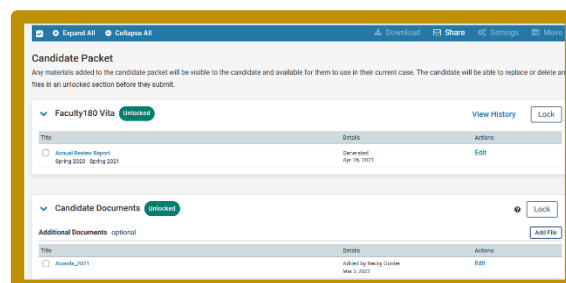
- 7 **Uncheck Send a message**
This will not send an email to the chair that a case has been created. This is to not clog up inboxes. Click Continue.



- 8 **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.




- 9 **Attach Grant Data**
Go to Cases. Search Faculty name. Under Candidate Documents- click Add File.



For assistance, contact **Facet Project team** at facet.help@emory.edu