Lead Staff Instructions to Create Annual Faculty Merit Evaluation Cases in Interfolio/Facet RPT

Log into Interfolio/Facet RPT and “Create Case”

- To log-in, go to www.emory.edu/facet. Recommended browsers are the latest versions of Chrome, Firefox, Safari, or Edge.
- Log-in using your regular Emory credentials. If you see icons for Emory University and Dossier, select Emory University.
- Under Review, Promotion and Tenure in the left menu, click “Cases.”
- In the top right corner of the page, click “Create Case.”

Select Candidates

- Click “+ Select Candidates.”
- Add all the tenure-track and teaching-track faculty in your unit (except the department chair/program director and any jointly appointed faculty) by checking the boxes to the left of their names and clicking “Add Candidates.” Use the search bar if needed. You will need to create cases separately for jointly appointed faculty whose tenure home or primary appointment is in your department or program. You do not need to create a case for your department chair or program director, or for jointly appointed faculty whose tenure or primary home is outside of your unit.
- Click “Continue” when all faculty have been added.
Case Set-up

- Under Unit for Case(s) - Select Department Name.
- Under Type - Select “Review.”
- Under Select Template, click the circle to the left of the appropriate template. This will be “ECAS-Department/Program Name” for most faculty. For jointly appointed faculty, look for the template called, “Joint Department/Program Names.”
- Click “Continue.”

Review Case Information and Candidates

Review case information and candidate list; confirm that dates are correct. The term range for the Faculty Activity Reporting Vita should be Summer 2023 to Spring 2024. Do not enter a soft deadline.

Settings

- Will the candidate be involved in this evaluation?
  - Confirm, “Yes, the candidate will be involved during the case.”
- Would you like to notify the candidates now?
  - Select, “Yes.” 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.”
• You will receive an email when all the cases have been created. Once you receive this email, click “Cases” under Review, Promotion and Tenure in the left menu to view the list of cases.
• Check the box to the left of the candidates’ names for the cases you will forward (only those with the template “ECAS-Department/Program Name” or “Joint Department/Program Names.” Do NOT forward tenure, promotion, or reappointment cases).
• Once you have checked all the cases you want to forward, at top of screen, click “Send Forward.”
• Uncheck “Send a message to the reviewers gaining access.” This is so multiple emails will not be sent to the chair notifying them that cases have been created.
• Click “Send.” This will move the case forward for chair/director review.

Regenerate Annual Review Reports (if needed)

If you created cases before the activity report submission deadline, regenerate the Faculty180 Vita “ECAS- Annual Review Report” for each faculty member being reviewed. Instructions:
• Log-in to Interfolio/Facet, and go to “Cases” under Review, Promotion and Tenure on the left side of the screen.
• Click on a faculty member’s name to enter their annual merit evaluation case. Go to the Candidate Packet, Faculty180 Vita, “ECAS- Annual Review Report.” Click on “Edit.”
• Ensure that the “Start Term” is Summer 2023 and the “End Term” is Spring 2024. Then, click “Regenerate.”
• Repeat this process for all regular teaching-track and tenure-track faculty in your department or program, and for jointly appointed faculty whose tenure home or primary appointment is in your department or program.

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