Directions for Submitting Data for the <u>2018</u> Annual Review through the Workflow Utility:

1. On your *Activities* page (the default faculty view after logging in), make sure you have created/updated/curated all of your 2018 activities.

2. Click the *Reports* link (top, blue navigation bar)
    a. Select the "<u>Data Quality Issues</u>" report.
    b. The Start Date defaults to the "beginning of time" (i.e., Jan 01, 1925). Do not change that.
    c. Click the "Run Report" button in the upper right of the browser screen.
    d. Open and save the report output to your computer.
    e. Review the report to see if there are any data quality issues to address (missing educational records, duplicate intellectual contribution entries, service/committee records that do not, but should have end dates, *etc.*).

3. Go to *Activities* (top, blue navigation bar) to correct any data quality issues. (Additional information on how to accomplish this is below, starting at the General Information heading).

4. Next, click on the *Workflow* link (top, blue navigation bar), then the Annual Review link under the Inbox.
    a. Click the "<u>MSU Generic Annual Review - Faculty Data</u>" report icon on that screen.
    b. Make sure the data in the report is complete and accurate.
    c. If there are errors in the report, or items you need to add, correct them on the *Activities* tab in Activity Insight.

5. Return to the *Workflow* link and the Annual Review link in your Inbox.

    a. Click the "Refresh report" icon.
    b. Click/rerun the "<u>MSU Generic Annual Review - Faculty Data</u>" report.

6. Faculty with extension appointments
    a. In addition to the above "<u>MSU Generic Annual Review - Faculty Data</u>" report, please generate a 2018 "<u>Extension - Engagement Plan</u>" report and drag-and-drop or upload it to the Supporting Documentation field.

7. Once your "<u>MSU Generic Annual Review - Faculty Data</u>" report has your complete and accurate 2018 activities and you have uploaded any supplementary documentation (using the field at the bottom of the screen) that your unit requires, click the <u>**Route**</u> button in the upper right hand corner of the window, then select the gold **Submit** option that pops up below it.

8. Should you have inadvertently submitted your annual review document before it was complete or correct, you can also use the <u>**Route**</u> button to retract your submission.

Updating your Annual Data:

General Information

To add or correct information on your "MSU Generic Annual Review - Faculty Data" report, click the **Manage Activities** link.

Review all screens and correct and/or update records as needed (note: the "Data Quality Issues" report is primarily focused on identifying potential duplicate and incorrectly, or un-dated records).

Give special attention to the following screens:

- *Personal & Contact Information*
  - Correct and/or update information (some of these fields also populate your department's Web Directory and your Faculty Web Profile)
  - Review the Teaching Interest(s) and Research Interest(s) fields as these pull into the new Faculty Web Profile template.
- *Biography & Expertise*
  - This screen may be used in the near future to populate a "subject matter expert" database.
- Appointment Data - *Yearly Data*
  - Enter your Annual Evaluation Narrative. This is a brief narrative highlighting your accomplishments for the 2018 calendar year.
    - You can type or copy and paste data into the text box. Some Departments require that you enter your narrative in the text box rather than use the document upload functionality (as it the report will just show the link to the uploaded document, not the content). Please check with your Department Head/Chair or School/Campus Director before uploading a file.
  - Enter Teaching, Scholarship, Service, and Administrative (if applicable) goals for 2019 calendar year.
    - Be specific in regard to teaching/research/service/extension. Goals should be action items that build upon past activities and accomplishments. It is also "ok" that you plan to maintain the quality program you already have in place. For example, elements of a teaching or extension program that is already highly effective. You can type or copy and paste data into the text box. Some Departments require that you enter your narrative in the text box rather than use the document upload functionality (as it the report will just show the link to the uploaded document, not the content). Please check with your Department Head/Chair or School/Campus Director before uploading a file.
    - The goals will pull into the new MSU - Faculty Annual Goals and Assigned Effort document that will be part of the annual review documentation submitted to the Dean's and Provost's offices.
- *Annual Workload Distribution*
  - Make sure there are records for the immediate past, and current academic year with the correct Confirmed Workload. If anything is missing or incorrect, please ask your Department Head to create and/or correct the appropriate records.

- *Administrative Assignments* (if appropriate - most will not have anything to report here).
- *Faculty Professional Enhancement Activities*
  - Include any training(s) that have contributed to your professional development.
  - If you participated in Center for Faculty Excellence programming, those records should have been created for you. Please review them to make sure they are complete and that you do not accidentally create duplicate records.
- Any other categories in the "General information" section
  - Check and update/correct as needed.

Teaching

Create and/or review all 2018 records. Correct and/or update as needed. Give special attention to the following screens:

- *Scheduled Teaching*
  - Insure that all information is correct and includes all classes taught. Independent study, and internship course records are <u>not</u> loaded into the *Scheduled Teaching* screen. You should create those records in the *Directed Student Learning…* screen.
  - For each class input the means for: Overall Instructor Rating, Mastery of Subject Matter, Organization of Class, Clarity of Presentation, Stimulation of Interest, and all other available fields for student evaluation of each particular course.
  - Consider filling in information in the categories of "describe any pedagogical innovations" "describe any new teaching material", and "Describe any activities in your course…" Especially if any of these were a goal for this reporting year.
  - Also keep in mind that the "Did this course include a service learning component?" field is used (counted) for MSU Strategic Planning metrics and other university level reporting purposes.
  - We also encourage you to upload a copy of your syllabus with each course record.
- *Other Instruction*
  - Faculty with extension appointments – use this field for extension education activities.
  - Faculty without extension appointments use this field for activities not covered under other links in the teaching section (Guest lecturer, etc.).
- *Directed Student Learning...*
  - List all graduate students that you may be supervising, including as Co-Advisor, and TAs, RAs, etc.
  - Check that graduate students who have completed their degree have an ending date.
  - List all undergraduate research, independent study, and internships that you provide direct leadership and mentoring for the student(s) involved. Do not include internships in which your involvement is limited to academic advisor and/or administrative approval.
- *Graduate Committees, Dissertations, and Theses*
  - This section should populate from Banner once the grad student has submitted a Program of Study & Committee form.
  - Insure that record is complete but remember that students that have not completed/submitted a program of study will not be listed in this screen (you identify "your" graduate students yet to submit a Program of Study & Committee Form in the *Directed Student Learning...* screen).

- o If the student has completed their graduate degree or you are no longer on the student's committee, there should be a date in the "Date faculty released from committee" field. If there is not, please contact Laura Collins (lcollins@montana.edu) in The Graduate School to make sure the Banner committee record is updated.
  - o It is possible that you could have duplicate records (at the <u>same</u> level - masters or doctorate) for a, or several students. This often happens if a student or program changes program codes (EDUC to EDCI, or MATH to STAT, etc.). If there are duplicate records that should be removed, please contact Ian Godwin (igodwin@montana.edu) in the Office of Planning & Analysis)
- *Academic Advising-Undergraduate*
  - o Insure that "number of students advised" is correct.
    - ▪ This number is a count of the individual students that you are identified as the Primary Advisor for in Banner. That association in Banner is a responsibility of your academic department. Please have them make the appropriate student/faculty advisor associations in Banner before contacting Ian Godwin (igodwin@montana.edu) to get the number changed.
  - o Consider including "Number of letters of reference", "Approx number of hours", and a "Description of advising".
- *Library Instruction*
  - o Only Library Faculty should see this link.
  - o Enter activities as appropriate.
- *Research Consultations*
  - o Only Library Faculty should see this link.
  - o Enter activities as appropriate.
- *Other Librarianship Activities*
  - o Only Library Faculty should see this link.
  - o Enter activities as appropriate.

Research, Creativity & Technology Transfer

Create and/or review all 2018 records. Correct and/or update as needed. Give special attention to the following screens:

- *Publications/Intellectual Contributions*
  - o Insure that this list accurately reflects all your publications/intellectual contributions. Be sure to add all MSU co-authors, as the publication will then show up on their page. Keep in mind that your MSU co-authors may already have created a record of the publication for you. Review the existing list to avoid creating duplicate records.
  - o Please also make sure that if one of the co-authors was a student you identify their level and whether they are an MSU student as these are metrics used in the Strategic Plan.
  - o Please ensure that the "Current Status" field is updated and correct.
  - o Please make sure that you select a response in the "Was this peer-reviewed/refereed?" drop down. Some reports (the "<u>Research Productivity Report</u>" developed for the VPRED, for example) <u>only</u> pull items that are peer-reviewed.
  - o Please make sure that all records have year in at least one of the fields at the bottom of these screens.
- *Artistic & Creative Activities*

- o Please provide as comprehensive information as possible for these records.
  - o These are shared records (with your co-exhibitors/performers/creators) so please check your summary screen list to make sure you are not duplicating a record that one of your co-contributors created on your behalf.
- *Grants and Sponsored Research, Contracts, Fellowships*
  - o Read and follow the directions given in this section. It self-populates from Banner, but anything that does <u>not</u> go through OSP will <u>not</u> be included (see #3).
- *Research in Progress and Other Funded Activities (not funded through the Office of Sponsored Programs)*
  - o This is for any unfunded or funded research/grants that do not get submitted via the OSP electronic Proposal Clearance Form process (grants funded directly from the MSU Foundation, internal grants from the Provost's Office, COA equipment grant, *etc.*)
- *Presentations*
  - o Review and update as needed, make sure to include MSU co-authors. This will then show up on their page.

Engagement, Outreach, and Service

Create and/or review all 2018 records. Correct and/or update as needed. Give special attention to the following screens:

- *Engagement Results*
  - o This screen captures the outcomes of your engagement (a form of scholarship that bridges teaching, research and service, and brings the university's intellectual resources to bear on societal needs) activities.
- *University*
  - o This is where you can input university, college, and department service. Make sure you enter a starting date. The ending date can remain blank if you are still engaged in a committee. If your service on the committee is over, please make sure you provide an end date.
- *Professional*
  - o Make sure you enter a starting date. The ending date can remain blank if you are still engaged in a committee. If your service on the committee is over, please make sure you provide an end date.
- *Public*
  - o Use this for service activities not covered in the above categories. Consider inputting community service (outside of the university and professional service).
- *Extension Time and Effort*
  - o Only faculty with an extension appointment will see this link.
- *Engagement Plan*
  - o Only faculty with an extension appointment will see this link.