

Faculty Tips: Conducting Annual Administrative Reviews



Anthology Portfolio (<http://uscupstate.chalkandwire.com>) is an eportfolio application, embedded in Blackboard that is available for programs and organizations to develop eportfolios for students or faculty and implement assessment processes or collective review for programs, courses, or institutional processes. Contact the Center for Academic Innovation and Faculty Support to design and implement an eportfolio system for your needs.

Purpose and Applications

You can use the Anthology Portfolio system to:

- Approve Requests for Exemption from completing the Annual Administrative Review for eligible faculty members.
- Review a faculty Annual Administrative Review file.
- Create a Faculty Review Form for a faculty member, whether or not they have submitted a required review.
- Notify faculty of their completed reviews, request interviews with faculty, and receive requests for interviews and/or optional written responses.

Table of Contents

Purpose and Applications	1
How to Conduct Annual Administrative Reviews	2
Login Instructions	2
Responding to a Request for Exemption.....	2
Responding to Materials Submitted for Administrative Review	4
Reviewing Faculty Materials	6
Completing the Faculty Review Form	8
Complete and Archive the Annual Administrative Review.....	10
Quick Tips.....	10

How to Conduct Annual Administrative Reviews

Login Instructions

- Login directly to the USC Upstate page at <https://uscupstate.chalkandwire.com> by clicking Sign on with Upstate ID or enter Anthology Portfolio through an email notification or through the CAIFS-PROFESSIONAL-DEVELOPMENT or ACADEMIC-LEADERSHIP Blackboard courses.

Responding to a Request for Exemption

All faculty members are required to submit either a file for review or a request for exemption. All requests for exemption require the submission of a CV. Requests for exemption that do not include a CV cannot be approved.

- Check your email for a notification that you have Work to Assess, or log in to Anthology Portfolio and click the **Pending Assessments** tab at the top of the Dashboard.
- Click any item labeled **Request for Exemption from Administrative Review** to reveal the drop-down menu.
- Click **Assess**. Find out more about [Accessing Pending Assessments](#), using the [assessment interface](#), and [Assessing and Commenting](#).
- You will see a copy of the candidate's materials on the left of the screen and an assessment instrument requesting confirmation (1.0) or denial (0.0) of the request for exemption. It is helpful to respond to these requests as you receive email notifications in case the faculty members are not eligible for exemption and will need to submit a full review. Note: Faculty members who elect to submit a file for post-tenure review must complete an annual review the spring before, and you may wish to notify faculty of this if they submit a request for exemption.

The screenshot displays the 'Request Exemption from Administrative Review' interface. The left pane shows the 'Annual Administrative Review Cover Page and CV' with a 'Cover Information Form and CV' section. The right pane shows the 'Response to Request for Exemption' assessment instrument, which includes a score of 1.0 and a 0.0 column, along with comment fields and navigation buttons like 'PREV' and 'NEXT'.

Figure 1 Screenshot of Request for Exemption materials, including candidate's portfolio on the left and the response assessment instrument on the right

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.

- Note: If you do not see the portfolio materials on the left, click the four-arrows icon in the middle of the top of the form to reduce the size of the assessment instrument and view the portfolio and assessment instrument side-by-side.
- Scroll down in the portfolio on the left, then click **View** next to the form to view the **Annual Administrative Review Cover Page** form. Confirm the accuracy of the year in the date of last review by checking the Academic Affairs Master List of Reviews from the Academic Affairs HR Coordinator. Only eligible faculty members who have completed a review within the past three years may be approved for exemption. Be sure pop-ups are enabled in your browser, and “incognito” browsers may work best if you have enabled high security in your system.
- Click View next to the attached file to view the updated **CV**.
- On the right side of the screen click the box under 1.0 to **Approve** an eligible faculty member with a CV.
- Click the **Not Approved (0.0)** box if the faculty member is ineligible or has not included a CV. For the latter, include a note in the Overall Comments, and click the checkbox by **Request Resubmission** (See Figure 1 or more [Request Resubmission details](#)).

Annual Administrative Review Cover Page and CV

The screenshot shows a web interface for an administrative review. On the left, a sidebar titled 'Cover Information Form and CV' contains an 'Overview' section with text about the university's goals and instructions for updating CVs. The main area displays a 'Response to Request for Exemption' form. At the top, it says '1 of 1' and 'Response to Request for Exemption' with a '1.0' rating selected. A black notification box states: 'Not Approved. All requests for exemption from administrative review require an updated CV. If the materials do not include the CV, indicate Not Approved, make a note in the overall comments, and click Request Resubmission button.' Below this, there is a 'Comment...' field and 'Comment Suggestions'. Navigation buttons 'PREV' and 'NEXT' are visible. The 'Overall Comments' section contains the text: 'An updated CV is required for exemption from Annual Administrative Review. Please upload your CV and resubmit your request.' At the bottom, a checkbox labeled 'REQUEST RESUBMISSION' is highlighted with a red box.

Figure 2 Request for Resubmission Assessment. Cursor is hovering over the 0.0 box to reveal the help text for the Not Approved option. Not approved has been selected (turns green), and Overall Comments are entered.

- You must respond to the question and, with slow internet connections, wait a few seconds to reveal the **green Save button**. If the green Save button does not appear, you may not have completed the form. Once it appears, [click the green Save button](#) to submit your responses. You will see a message that your assessment has been saved. Ignore the message about the LMS.

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.

- Click the arrow next to the faculty member's name to move to the next request. Click the checkmark in the gray box to return to all Pending Assessments.

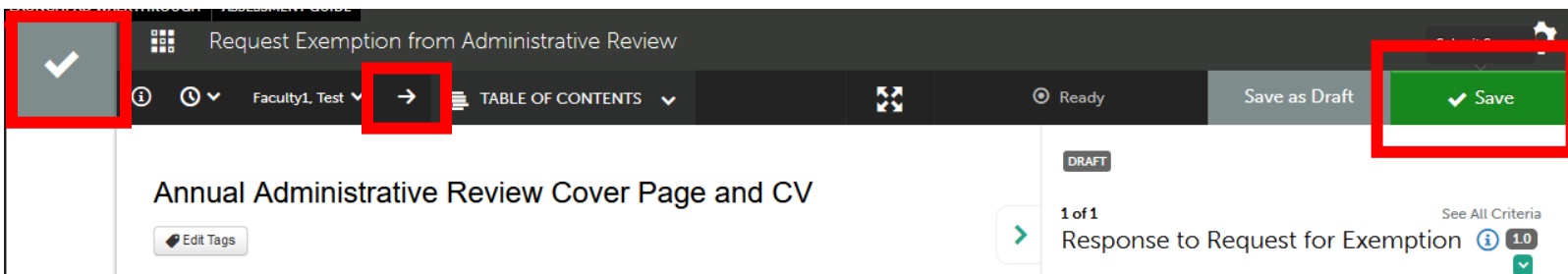


Figure 3 Assessment Instrument Navigation Options and Green Save Button

Responding to Materials Submitted for Administrative Review

- Check your email for a notification that you have Work to Assess or log in to Anthology Portfolio and click the **Pending Assessments** tab at the top of the Dashboard.
- Click any item labeled **Materials Submitted for Administrative Review** for one of your faculty members to reveal the drop-down menu. It is helpful to do this immediately upon receipt of the notification to alert faculty members to missing materials, if necessary.

All Pending Assessments, Past 5 years.

The screenshot shows a table of pending assessments. The table has columns for Student, Instrument, Submitted, and Assessment Status. The row for 'Faculty1, Test' with the instrument 'Materials Submitted for Administrative Review' is highlighted in blue. A drop-down menu is open over this row, with the 'Assess' option highlighted in a red box. The menu options include: View Assessment Instrument, View Table Of Contents, View Summary, View Details, Download Portfolio As PDF, Work, Withdraw, Assess, Transfer, Delete, Annotations, View Student Info, and View Assessor Info. To the right of the table is a sidebar with navigation options: Go to Assessment Instruments, My Held Assessments, All Pending Assessments, Pending Assignments, Pool Assessment, My Assessment Pools, Completed Assessments, and Completed Assignments.

Student	Instrument	Submitted	Assessment Status
Bland, Jennifer	Adjunct Faculty Self-Evaluation	2022-01-24 08:02	MANUAL
Faculty1, Test	Notification of Review Sent to Candidate	2022-01-26 21:31	NORMAL
Faculty1, Test	Materials Submitted for Administrative Review	2022-01-26 21:31	NORMAL
Kusch, Celena	Post-Tenure Review Committee Chair Receives Portfolio	2022-01-26 20:52	NORMAL
Kusch, Celena	Post-Tenure Review Committee Vote Tally	2022-01-26 20:52	NORMAL

Figure 4 View of Pending Assessments with drop-down menu options for Materials Submitted for Administrative Review

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.

- Click **Assess**. Find out more about [Accessing Pending Assessments](#), using the [assessment interface](#), and [Assessing and Commenting](#). You will see the review file materials on the left side of the assessment interface and your confirmation assessment instrument on the right. If you do not see a split screen, click the four-arrows icon in the middle of the top of the form to reduce the size of the assessment instrument and show the portfolio and assessment instrument side-by-side.



Figure 5 Navigation bar at the top of a portfolio being assessed, including Table of Contents drop-down menu

- Use the Table of Contents drop-down to move from page to page within the file.
- Select the Annual Administrative Review Cover Page and CV page and scroll down to confirm the presence of the updated **CV**. Select the **Annual Administrative Review Materials** page to confirm that the faculty member has submitted a narrative and any other items you requested for your review. Instructors and Senior Instructors may comment on the Scholarly/Creative Activities **and/or** Service.
- On the right side of the screen click the box under 1.0 to indicate **Received** if all materials are present.
- Click the **Incomplete (0.0)** box if the faculty member has not included a CV or other necessary information.

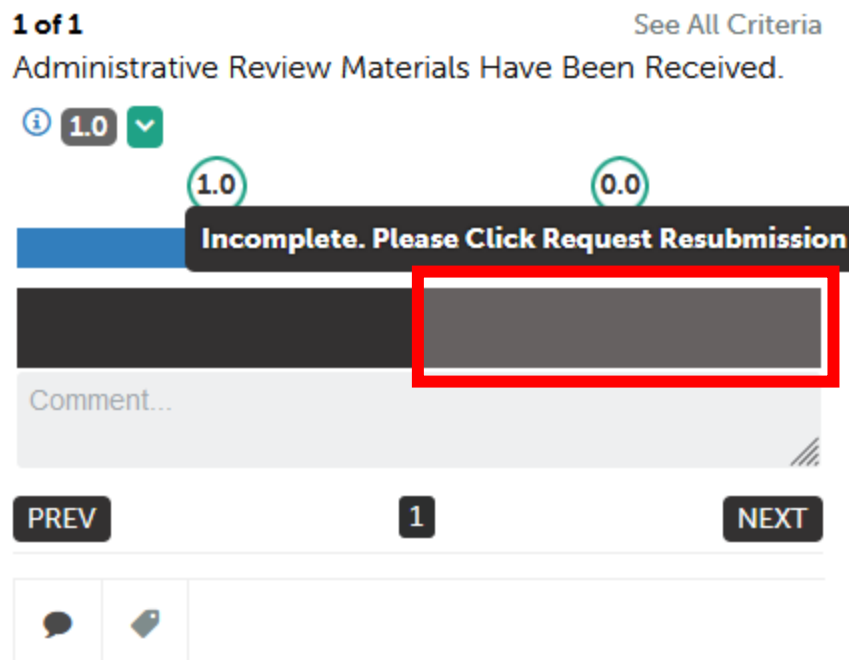


Figure 6 Administrative review assessment instrument hovering over the 0.0 Incomplete box

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.

- If the file is incomplete, include a note in the Overall Comments, and click the checkbox by **Request Resubmission** (See more [Request Resubmission details](#)).

Figure 7 Request Resubmission if annual review materials are incomplete

- You must respond to the question and, depending on your internet speed, wait a few seconds to reveal the **green Save button** in the upper-right of the screen. Then, [click the green Save button](#) to submit your responses. You will see a message that your assessment has been saved. Ignore the message about the LMS. You are not sending the faculty member's scores to Blackboard.



Figure 8 Save option ready to submit approval or rejection of the administrative review materials

- Click the arrow next to the faculty member's name to move to the next request. Click the checkmark in the gray box to return to all Pending Assessments.

Reviewing Faculty Materials Prior to July 1

- You have access to your unit's Learning Experience Surveys from the Office of Institutional Effectiveness and Compliance through your unit's Sharepoint space. Your folder includes a .csv file (Excel spreadsheet) providing a summary of your unit's statistics for that term. You may wish to sort this data by instructor to get an overview of your instructor ratings prior to opening the PDF including all student comments. It may be helpful to review this PDF in one sitting and take notes by faculty member rather than going back and forth between faculty reviews and the PDF with comments.
- To review your faculty members' materials when you are ready to write reviews, log in to Anthology Portfolio, and click on **Menu**, then **Assess**.

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.

- If you have already responded to your faculty members' submissions as they arrive, following the instructions above, your faculty materials will be under Completed Assessments. Click **Menu**, then **Assess**. Click on **Completed Assessments** on the right side of the screen. If you have not already responded as above, they will be under Pending Assessments (i.e. pending your submitting your response).

All Pending Assessments, Past 5 years.

Student	Instrument	Submitted	Assessed	Status
Bland, Jennifer	Adjunct Faculty Self-Evaluation	2022-01-24 08:02 MANUAL		PENDING
Faculty1, Test	Notification of Review Sent to Candidate	2022-01-26 21:31 NORMAL		PENDING
Faculty1, Test	Materials Submitted for Administrative Review	2022-01-26 21:31 NORMAL		PENDING
Kusch, Celena	Post-Tenure Review Committee Chair Receives Portfolio	2022-01-26 20:52 NORMAL		DRAFT

Figure 9 Completed Assessments button on the right side of the screen

- From the Completed Assessments page (or Pending Assessments, if you are doing both steps at the same time), click on the line for **Materials Submitted for Administrative Review** for your faculty member to reveal a drop-down menu.
- From the drop-down menu, click on **Work** to view the portfolio (the “work”) the faculty member has submitted for your review.

Completed Assessments, Past 4 months.

Student	Instrument	Submitted	Assessed
Faculty1, Test	Materials Submitted for Administrative Review	2022-01-26 21:31 NORMAL	2022-01-26 21:31

Figure 10 Materials Submitted for Review showing Work in drop-down menu

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.

- Your faculty member's portfolio will open with a clickable table of contents on the left and the materials on the right. Scroll down below the instructions on any given page to view forms and attachments submitted by the candidate. Click on either the first page (Annual Administrative Review Cover Page and CV) or second page (Annual Administrative Review Materials) to see materials the candidate has submitted. The other pages will be blank at this time.

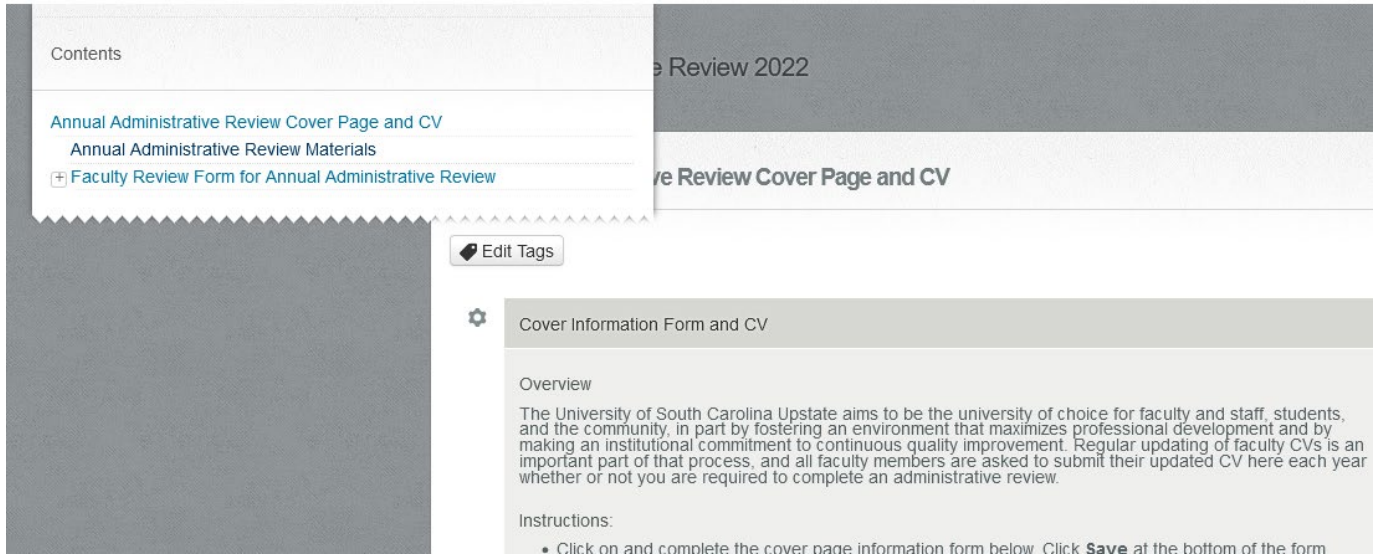


Figure 11 Annual Administrative Review Portfolio viewed in "Work" mode from the assessments page

- Take notes about the candidate's file to enable you to draft comments to enter into the Faculty Review Form. Note: You must write comments about teaching or librarian effectiveness for faculty of all ranks. Instructors and senior instructors may choose to be evaluated on scholarly/creative and/or service activities. Tip: Write notes for these comments based on the file, learning experience survey results, and any other relevant measures for your unit in a separate Word document where you can edit and save. Then, cut and paste your comments into the final Faculty Review Form.

Completing the Faculty Review Form, due July 1

Faculty Review Forms are included as part of a portfolio you share with your faculty member. This allows the faculty member to request resubmission in case of errors and omissions, and it allows you to complete a Faculty Review Form even if your faculty member has not submitted their review materials by the deadline. You must either approve a Request for Exemption or submit a Faculty Review Form for all full-time faculty members every year.

- Click on the **Menu** on the far left (three lines, labeled menu).
- Click on **Work**, then **Collaboration**.
- If necessary, click the blue Accept Invitation button on the right to join your collaborative workspaces, then click the collaborative workspace labeled with your faculty member's name and "Review Workspace."

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.

- Click on the portfolio labeled with your faculty member's name and "Annual Administrative Review 2022" (or the current year).

Figure 12 Annual Administrative Review Portfolio with Faculty Review Form

- Click the third table of contents item, **Faculty Review Form for Annual Administrative Review** to start submitting. Your faculty member has the ability to view this page but cannot edit or submit from it.
- Click **Form Faculty Review Form** and complete the eight questions. *Pop-ups must be enabled for this site to view/complete forms. Click N/A for instructors/senior instructors who are not submitting materials in both the scholarly/creative activities and the service activities areas. Click **Save** at the bottom of the form. Click **Close Form** at the top of the form.
- Click the green **Submit** button in the upper-right section of the page.
- Click **Administrative Review Notification (Single Page)**. Click **Continue**.

Figure 13 Selecting Form to Submit Administrative Review to Faculty Member

- Enter the last name of your faculty member in the "Type here" box. Select their full name when it appears in the selection list below the box. You will see their name appear with a checkmark. Click **Submit**.

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.

- Wait to receive notification from Anthology Portfolio that your faculty member has confirmed receipt of your Administrative Review. If they request a [resubmission of your Faculty Review Form](#) due to omission or error, please update your review and resubmit.
- Faculty members will use their form to indicate a request for resubmission, request for an interview, and/or intent to submit an optional written response. Be sure to read their response and complete any required action items.

Complete and Archive the Annual Administrative Review

After the faculty member responds to your Administrative Review Notification, you may be ready to submit the completed review to the dean, provost, and Academic Affairs HR Coordinator.

- If the faculty member has indicated Yes for confirming receipt and No for intent to upload optional written response, you may complete the final step immediately. If the faculty member has indicated Yes for intent to upload an optional written response, please wait until you receive notification that the faculty member has uploaded the file or for 10 days, whichever comes first, then proceed to the next step.
- Return to the Collaborative Workspace portfolio, navigate to the **Faculty Review Form for Annual Administrative Review** page, then click **Submit** in the upper-right corner.
- This time click **Faculty Review Form Notification (This Page and Subpages)** (See Figure 4). Click **Continue**.
- Enter the last name of your dean, provost, and Academic Affairs HR Coordinator, Ryan Boggs, in the “Type here” box. Select their full name as they appear in the selection list below the box. Then, you will see their names displayed with a checkmark in front of it. Click **Submit**.

Quick Tips

- View a [video tutorial](#) of the Annual Administrative Review process from the unit administrator’s perspective. What’s in the video:
 - View Pending Assessments with Notifications from Faculty (timestamp 1:12)
 - Respond to a Request Exemption from Annual Administrative Review Notification (timestamp 2:24)
 - Respond to Materials Submitted for Annual Review (timestamp 7:37)
 - Fill in the Faculty Review Form (timestamp 15:30)
 - Submit an Administrative Review Notification to the Faculty Member (timestamp 21:20)
 - Submit a Faculty Review Form Notification to dean, provost, and HR Coordinator (timestamp 23:30)
 - View an Overview of the Annual Review Process (timestamp 25:35)
- To understand the process from your faculty members’ perspective, view a [video overview](#) of the Annual Administrative Review process.
 - Using the Dashboard (timestamp :40)
 - Locate Your Annual Administrative Review Portfolio (timestamp 1:55)
 - Inside the Annual Administrative Review Portfolio (timestamp 4:14)
 - Complete the CV and cover page required annually (timestamp 4:21)
 - Submit the Request for Exemption, if applicable (timestamp 7:15)

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.

- Complete the Annual Administrative Review Materials (timestamp 8:58)
- Submit the Annual Administrative Review (timestamp 13:17)
- Download a copy of the portfolio (timestamp 14:55)
- About the Faculty Review Form and confirmation notice (timestamp 15:49)
- About the Optional Written Response (timestamp 20:35)
- Add your portfolio to your Watch List for easy access from the Portfolio tab on the Dashboard (timestamp 22:58)

For help with Anthology Portfolio, contact Celena Kusch, 864.503.5850 or kuschc@uscupstate.edu.