

Guide to Reviewing Faculty Annual Reviews Through Faculty Success Workflow

This document is a guide for Department Heads/Directors on how to review faculty annual productivity information through the Workflow process, for [Tenured & Tenure Track](#) and [Non-Tenure Track \(section 8.09, p. 17\)](#) annual reviews. There are three steps to completing your portion of the annual review:

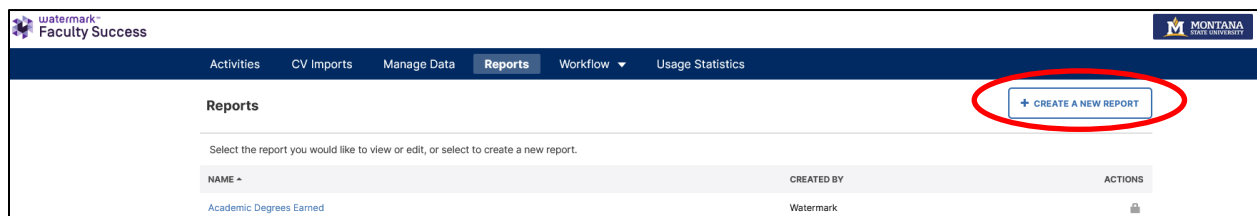
1. Creating Annual Workload Distribution Records (pp. 1-2)
2. Reviewing & Assessing Faculty Productivity in Workflow (pp. 3-5)
3. Electronically “Signing” the Review and Forwarding to Dean (p. 6)

Creating Annual Workload Distribution Records:

You will need to make sure that each of your faculty has a **2025-2026** record on their Annual Workload Distribution screen. **Faculty cannot create these records.** Only you or your designee (Administrative Associate, if you have requested someone to have access in your department) can create them. To allow your faculty the possibility of suggesting an alternate workload distribution for **next** academic year (2026-2027), the 2025-2026 records should be in place before faculty submit their material for your review.

There are a few ways to do this, depending primarily on the number of faculty you have in your department.

- If you have just a few faculty (6 or less), it might be easiest to go into their individual profiles
 - Click on their Annual Workload Distribution screen
 - Check the box to the right of their 2024-2025 (or most recent year) record
 - Click the **Duplicate** button up above the checkbox column
 - Change the Academic Year to 2025-2026 (and make any workload distribution changes, if necessary) and click the **Save** button in the upper right corner of the browser window.
- If you have several faculty (>6), it may be more efficient for you to send us a list to bulk upload 2025-2026 records using the following instructions:
 - Once in Faculty Success, click on the **Reports** link in the top (dark blue) navigation bar.
 - From the **Reports** screen, click the **Create a New Report** button in the upper right corner of the browser window.



- In the pop-up window, select the **Export Data** icon (right hand side of the pop-up).
- For the report development criteria:
 - Date Range – Use the date range (Start Date - **Jan 1, 2025**, end date of **Dec 31, 2025**). Be aware that if no 2024-2025 record(s) exists in faculty profiles, no data will be returned, in which case you will need to select an earlier start date (year).
 - Whom to Include – Click the **Change Selection** link and select **your department** from the drop down menu under **Department** box and **Tenured** and **Tenure-Track** options from the drop down menu under the **Tenure Status** box in the pop-up window.
 - Data to Include – click on the **Change Selection** link and in the pop-up window:
 - **Uncheck** the Include All box
 - Click the arrow to the left of the System Details box (do not check the box)
 - Select (check the box to the left of): User Identifiers
 - Select (check the box to the left of): User First, Middle, Last Name and Email (this is just to assist you so you don't have to look everyone up by their NetID when the report is run)
 - Click the arrow to the left of the Common Items box (do not check the box)
 - Click the arrow to the left of the Annual Workload Distribution box (do not check the box)
 - Select (check the box to the left of):
 - Academic Year
 - Confirmed Workload (for current academic year)
 - Click the **Save** box at the bottom right of the pop-up window.
- You can leave the other parameters (numbers 4, 5, and 6) alone in their default state
- Click the **Run Report** button in the upper right corner of the browser window.
- Depending on your browser settings, either an Excel document will open automatically on your desktop, or it will be saved and available to open in your browser downloads.
 - Change the AC_YEAR from 2024-2025 to 2025-2026
 - Now, update the Teaching, Research, Service, and Admin % for each faculty member.
 - The percentage across all four categories should total 100 **unless** the faculty has been approved for Additional Compensation, in which case the total may be up to 120 percent.
 - Save and e-mail the revised spreadsheet to facultysuccess@montana.edu and we will bulk upload the new records into your faculty's profiles.

Reviewing & Assessing Faculty Productivity in Workflow: (This applies to Tenured & Tenure-track and Non-Tenure Track faculty)

If you would rather watch a 13:15 video on the process below, Watermark has made one available: [Reviewing A Workflow Submission](#).

When a faculty member submits their annual review material in Workflow it triggers an e-mail notification to the reviewer(s) (either Department Head/Director or Review Committee members). When you click the link in the e-mail (or go to the Workflow link after you log into Faculty Success), you will see faculty submissions that have not yet been reviewed (or forwarded to the next step) in the top **Inbox** section of the Workflow Tasks window.

Workflow Tasks

▼ **Inbox**

| Name | Step | Subject | Due Date |
|---------------|-------------------------------------|------------|------------------------------|
| FAR - TEST #9 | Department Head Review & Assessment | Ian Godwin | December 15, 2019 @ 11:59 PM |

▼ **History**

| Name | Current Step | Subject | Last Modified | Actions |
|--------------------|--------------|---------|---------------|---------|
| No Data to Display | | | | |

When you click the link (in the screenshot above: schedule name – “FAR – TEST #9”), it will direct you to what the faculty member submitted for you to review and the review form.

Your review ratings (scores) and narratives for teaching, scholarship, service, and administration (if the faculty member has an administrative component to their workload) will all be entered on this screen (screenshot on next page).

Notes for entering review data:

- The ratings (numeric scores) should be between 0-8 and expressed in no more than 1/10ths of a point (e.g. 5.1).
- The T/TT ratings should match what was entered on the Provost’s “Dept xyz_Annual Review Worksheet_CYXXXX” (Contact Julie Heard in the Provost’s Office if you do not have this Excel spreadsheet) that you will be submitting to your dean and ultimately back to the Provost.
- The “**OVERALL ANNUAL REVIEW RATING**” rating for T/TT faculty should be transcribed from the “**Geometric Weighted Avg.**” column on the Provost’s spreadsheet.
- All the rating and narrative fields, except for those associated with Administration, are required fields for **T/TT** faculty.

- All the rating and narrative fields for **NTT** faculty are “optional” to account for the flexibility with which NTT are assigned workload units.

Department Head Review & Assessment Step - Due December 15, 2019 @ 11:59 PM

Submitted December 13, 2019 by Ian Godwin

Instructions regarding how to submit data through the Workflow utility and information on how to update your annual review data will open in a new browser window by clicking [here](#).

MSU - Faculty Annual Review (Faculty Submitted Data) Last Updated December 13, 2019 at 9:26 AM

Regarding workload distribution for NEXT academic year (2020-2021) I would like to maintain my current (2019-2020) workload distribution

Supporting Documentation (if requested by department)

Optional comments, including proposed workload distribution if different from current year

Instructions regarding how to review submitted data through the Workflow utility will open in a new browser window by clicking [here](#).

| Unacceptable Performance | Below Expectations | Acceptable Performance | Strong Performance | Exemplary Performance |
|--|---|---|---|---|
| Unacceptable performance in an Area of responsibility. Performance is inadequate. The specific areas that are deficient will be addressed in the narrative. Requires a Performance Improvement Plan for the next academic year | Performance in an Area of Responsibility is below expectations. Performance is frequently less than satisfactory and fails to meet expectations. The narrative must address specific areas that requires a Performance Improvement Plan for the next academic year. | Performance of assigned responsibilities consistently meets expectations and contributes to the success of the department's mission.. | Performance of assigned responsibilities consistently exceeds expectations and contributes significantly to the success of the department's mission. Supporting evidence will be provided in the narrative. | Performance is superior and merits special recognition for unequivocally superior performance (e.g., worthy of national, international, or professional award nomination, or is clearly outstanding in his/her field) Supporting evidence will be presented in the narrative. |
| 0 - 0.9 | 1 - 2.9 | 3 - 4.9 | 5 - 7.9 | 8 |

- Teaching Rating (#'s between 0-8, to 10ths of a point, e.g. "5.1", or "NA")
- Teaching Assessment Narrative

B I U [Icons]
- Scholarship Rating (#'s between 0-8, to 10ths of a point, e.g. "5.1", or "NA")

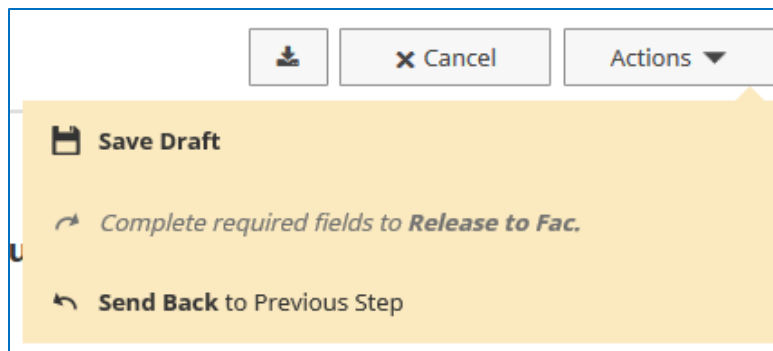
- The “Regarding workload distribution for NEXT academic year (2026-2027)*” is also a **required field** for T/TT.
 - You will not be able to release the annual review for faculty acknowledgement if you do not select an option in this field.

- In accordance with the MSU Faculty Handbook, if there will be [change in assigned percentages of effort](#), have the necessary conversations with the faculty member and an agreement made **before** you forward your review back to the faculty member (otherwise, they will simply send it back to you in Workflow).
- The narrative fields in this screen will accept text that is typed, pasted, or drag-and-dropped into them.

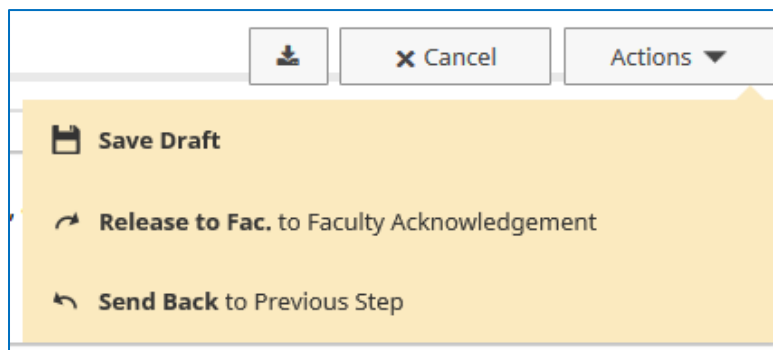
Notes regarding the **Actions** (button in the upper right corner of the window) allowed from this screen:

- You can **“Save Draft”** and return to finish the review at a later point.
- You will not be able to **“Release to Fac. to Faculty Acknowledgement”** until all the required fields have data entered in them (Screenshot A and Screenshot B).
- You can **“Send Back to Previous Step”** if the information submitted to you was incomplete or incorrect and you want faculty to address those issues before you do your review.
 - If you **“Send Back...”** you will get a pop-up window for you to enter a message to the faculty member regarding what specifically you want them to change/address and a due date for them to resubmit.

Screenshot A



Screenshot B



Once you “**Release to Fac.** to Faculty Acknowledgement” from the **Actions** button, the review will move from your Workflow Tasks **Inbox** to the **History** section and return to the faculty members Workflow **Inbox** for them to acknowledgement having seen the review. The faculty member will receive an e-mail from Watermark informing them that their review has been returned for acknowledgement.

Signing the Review and Forwarding to Dean:

Based on [annual review policies](#), faculty members have 10 days within which to appeal their review from the department head/director to the dean. Assuming they do not submit such an appeal, they will electronically sign (initial in an acknowledgement box and date) indicating that they have seen their review and “**Acknowledged** to Department Head Sign – Forward to Dean”. When they have done that, their review will return to your Workflow Tasks **Inbox**.

When you click the link to their submission, it will take you to a screen showing all previous steps and at the bottom of the screen (scroll to the bottom), a box for you to initial before you “**Forward to Dean** to Dean Review” from the **Actions** button.

The screenshot displays the 'Annual Review Workflow' interface. At the top, a horizontal progress bar shows six steps: 'Faculty Submission', 'Dept Head Review & Assessment', 'Faculty Acknowledgement', 'Dept Head Sign' (highlighted in yellow), 'Dean Review', and 'Academic Affairs'. Below the progress bar, on the left, is a text area labeled 'Optional Comments (will not be seen by faculty)'. To the right of this is a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), bullet points, numbered list, link, unlink, table, undo, redo, and source code. Below the text area and editor is a label with a red asterisk: 'Department Head/Director Initials (also indicates approval of any workload distribution arrangements previously referenced):'. To the right of this label is a text input field containing the initials 'DHX'.

You're done!

FINAL NOTES

- There are **NO** paper forms to sign or upload in this Annual Review Workflow. All “signatures” are electronic and are saved and time stamped by the Workflow system.
- Completed reviews can be downloaded and archived from the Workflow Tasks History or Workflow Submissions link.