

# Understanding the Faculty Evaluation Process on Submittable

For Faculty Evaluation Managers



Welcome to Understanding the Faculty Evaluation Process on Submittable for Faculty Evaluation Managers.

We have a lot to cover today so I'll be moving through this pretty quickly but we have set aside time at the end of the session to answer questions.

Claudine and I are also hosting office hours on Zoom every Thursday throughout the rest of the semester and you're always welcome to reach out to me directly on Teams or by phone or email.

# FE in Submittable Overview

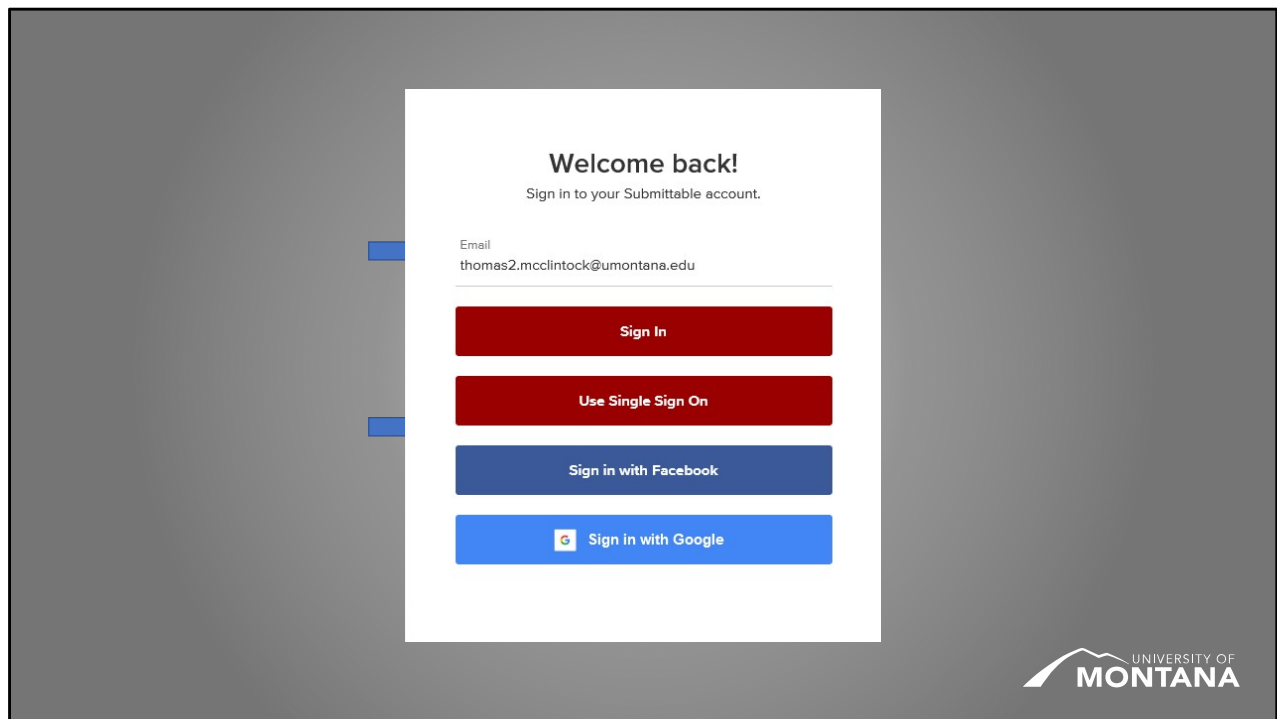
- Logging in to Submittable
- Filtering Submissions
- The I/E Form
- The IPR Form
  - Setting Stages and Assignments
  - The SEC Stage
  - FEC, Chair/Director, and Dean Stages
  - Messaging and Sign/Appeal and Sign/Acknowledge Additional Forms
- Questions



We'll be covering the process of logging in to Submittable and how to filter submissions, explain the steps to take with the Intake/Exemption form, provide an overview of the IPR form that your faculty will be submitting, then dive in to setting stages and assignments. We'll discuss the SEC stage then move to the FEC, Chair/Director, and Dean stages. We'll cover messaging, where you send the various reviews to the faculty member and the additional forms. I'll open it up to questions after each of the steps and again at the end of the session.

# Logging in to Submittable





Let's start with Logging in.

To access all the faculty evaluation materials, you'll go to [umtprovost.submittable.com/submissions](https://umtprovost.submittable.com/submissions). If you're not logged in already, it'll redirect you to the login page.

Since you're accessing the submissions page for a UM team, the "Use Single Sign On" button is displayed. Go ahead and click that.

You can also enter your Umontana address in the email field and the password field will disappear and you'll be redirected to the SSO when you click "Sign In" and that applies even if the "Use Single Sign On" button isn't there.

From there, just log in with your NetID just like any other UM system.

# Filtering Submissions



Submittable Submissions Projects Forms Reports Funds More

UM Office of the Provost View Your Site

Show Filters

first prev page 1 of 3 (1082 results) next last

Stage Assign Label Message Additional Forms Open Editing Accept Decline Complete Other

SCORE	STAGE	SUBMISSION	SUBMITTER	PROJECT	DATE	STATUS	ASSIGNED
	Admin	Queen	Lloyd Queen	Faculty Evaluation - Intake/Exemption Form (AY 21-22)	9/22/2021	New	Unassigned
	Admin	Reiser	Mark Reiser	Faculty Evaluation - Intake/Exemption Form (AY 21-22)	9/22/2021	New	Unassigned
	Admin	Ream	Tam Ream	Faculty Evaluation -	9/22/2021	New	Unassigned

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Once you're logged in, you'll be at the main submissions page for the Office of the Provost.

You'll notice pretty quickly that we have a lot of submissions, many of which aren't the ones you're going to be working with and, even within the ones you are, it can be really helpful to pare them down further to just a subset for specific tasks.

That's where filters come in.

The screenshot shows the Submittable interface for the University of Montana Office of the Provost. At the top, there is a navigation bar with links for Submissions, Projects, Forms, Reports, Funds, and More. A 'View Your Site' button is located in the top right corner. Below the navigation bar, the page title 'UM Office of the Provost' is displayed. A 'Hide Filters' button is on the left, and pagination controls (first, prev, page 1 of 3 (1082 results), next, last) are in the center. A search bar is on the right. The 'SEARCH FILTERS' section is divided into two columns. The left column includes filters for Project (None selected), Review Stage (Select a project to filter by review stage.), Assigned (None selected), Rating (None selected), Additional Forms (None Selected), and Status. The right column includes filters for Label (None selected), Start Date, End Date, Status (None selected), Additional Forms (None Selected), Include (Active, Archived, Both), and Review Status (None selected). A blue arrow points to the 'Project' filter dropdown. At the bottom, there are buttons for 'FILTER RESULTS' and 'Clear Filters'. The University of Montana logo is in the bottom right corner.

We'll go through them mostly in order starting with the "Project" filter.

The two projects you'll be working with during the FE process this year are the "Faculty Evaluation – Intake/Exemption Form (AY 21-22)" and the "Faculty Evaluation – IPR Submission (AY 21-22)."

The next filter, "Review Stage," allows you to see only those submissions at a specific stage in the process.

We'll cover setting the stage of a submission or multiple submissions later but if you're looking for just the IPR submissions currently in the FEC stage, you can open up the dropdown menu and look for only those submissions in that stage.

The screenshot shows the Submittable interface for the University of Montana Office of the Provost. The top navigation bar includes links for Submissions, Projects, Forms, Reports, Funds, and More. The main header displays 'UM Office of the Provost' and a 'View Your Site' button. Below the header, there's a search bar and pagination controls showing 'page 1 of 3 (1082 results)'. The 'SEARCH FILTERS' section on the left includes a 'Hide Filters' button and a 'FILTER RESULTS' button. The filters are organized into categories: Project, Review Stage, Assigned, Rating, Additional Forms, and Status. The 'Project' filter is set to 'Faculty Evaluation - IPR'. The 'Review Stage' filter is currently set to 'Faculty Evaluation Com...' and is highlighted with a blue arrow. The 'Assigned' filter has checkboxes for 'Admin Updates', 'Faculty Evaluation Committee' (checked), 'Dept Chair', 'Dean', and 'Provost'. The 'Rating' filter has a checkbox for 'Faculty Evaluation Committee' (checked). The 'Additional Forms' filter is set to 'None Selected'. The 'Status' filter has checkboxes for 'Active' (checked), 'Archived', and 'Both'. The right side of the filter section includes dropdown menus for 'Label' (None selected), 'Start Date', 'End Date', 'Status' (None selected), 'Additional Forms' (None Selected), 'Include' (Active, Archived, Both), and 'Review Status' (None selected). The bottom of the page features the University of Montana logo.

The next filter, “Review Stage,” allows you to see only those submissions at a specific stage in the process.

We’ll cover setting the stage of a submission or multiple submissions later but let’s look at the filter options first.

If you’re looking for just the IPR submissions currently in the FEC stage, for example, you can open up the dropdown menu and look for only those submissions in that stage.

You can also select multiple stages to filter down to.



The screenshot shows the Submittable website interface for the UM Office of the Provost. The top navigation bar includes links for Submissions, Projects, Forms, Reports, Funds, and More. The main header displays the UM Office of the Provost name and a 'View Your Site' button. Below the header, there is a search bar and pagination controls showing 'page 1 of 3 (1082 results)'. The 'SEARCH FILTERS' section is divided into two columns. The left column includes filters for Project, Review Stage, Assigned, Rating, Additional Forms, and Status. The right column includes filters for Label, Start Date, End Date, Status, Additional Forms, Include (Active, Archived, Both), and Review Status. A blue arrow points to the 'Assigned' filter dropdown menu. At the bottom of the filters section, there are buttons for 'FILTER RESULTS' and 'Clear Filters'. The University of Montana logo is visible in the bottom right corner.

Next, the “Assigned” filter will let you filter down to just those submissions that have been assigned to a specific reviewer or set of reviewers (e.g. a department chair). Again, we’ll cover assigning submissions shortly but, just like the “Review Stage,” you can select one or multiple reviewers to filter down to.

Submittable Submissions Projects Forms Reports Funds More

UM Office of the Provost View Your Site

Hide Filters first prev page 1 of 3 (1082 results) next last

SEARCH FILTERS

Project	None selected	Label	None selected	<input checked="" type="radio"/> Include <input type="radio"/> Exclude
Review Stage	Select a project to filter by review stage.	Start Date		
Assigned	None selected	End Date		
Rating	None selected	Status	None selected	
Additional Forms	None Selected	Additional Forms	None Selected	
Status		Include	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Both	
		Review Status	None selected	

FILTER RESULTS Clear Filters

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For now, go ahead and ignore the “Rating” filter.  
Jumping ahead a bit, you probably also won’t need the Additional Form Status or Start and End Date filters at this time.

Submittable Submissions Projects Forms Reports Funds More

UM Office of the Provost View Your Site

Hide Filters first prev page 1 of 1 (1 results) next last

SEARCH FILTERS

Project Faculty Evaluation - IPR

Review Stage None Selected

Assigned None selected

Rating None selected

Additional Forms None Selected

Status

Label None selected Include Exclude

Select All

Select None

☐ No Label

☐ ABSoL

☐ Accounting and Finance

☐ Adjunct Assistant Profess

☐ Adjunct Associate Profess

☐ Adjunct Full Profess

Done

FILTER RESULTS Clear Filters

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The Label field will be incredibly helpful in this process. All submissions are automatically labeled with their college and academic unit, the faculty member's rank, if they're tenure track or not, and what action or actions they're requesting. You can select any of these in any combination to filter by so, for example, an academic unit FE manager who's overseeing the process for several units can filter down to see the submissions for just one department or they can see all the tenure track faculty requesting a normal increment in all their units.

Submittable Submissions Projects Forms Reports Funds More

UM Office of the Provost View Your Site

Hide Filters first prev page 1 of 3 (1082 results) next last

SEARCH FILTERS

Project	None selected	Label	None selected	<input checked="" type="radio"/> Include <input type="radio"/> Exclude
Review Stage	Select a project to filter by review stage.	Start Date		
Assigned	None selected	End Date		
Rating	None selected	Status	None selected	
Additional Forms	None Selected	Additional Forms	None Selected	
Status		Include	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Both	
		Review Status	None selected	

FILTER RESULTS

Finally, you may end up using the “Additional Forms” filter later when we get to the sign/appeal and sign/acknowledge parts of the process, depending on your workflow. The “Include” and “Review Status” filters will only come up after the process is over and we’ve archived this year’s submissions. Once your filters are set up how you want, hit filter results to apply them.

Submittable Submissions Projects Forms Reports Funds More

UM Office of the Provost View Your Site

Show Filters first prev **page 1 of 1 (1 results)** next last

Results are being filtered. Project: Faculty Evaluation - IPR Submission (TEST)  
(1 total results)  
Clear Filters

☐ Stage Assign Label Message Additional Forms Open Editing Accept Decline Complete Other

SCORE	STAGE	SUBMISSION	SUBMITTER	PROJECT	DATE	STATUS	ASSIGNED
<input type="checkbox"/>	Admin Updates	McClintock	Tom McClintock	Faculty Evaluation - IPR Submission (TEST)	9/21/2021	New	Unassigned

ASSISTANT PROFESSOR COLLEGE OF HUMANITIES & S DEPARTMENT OF ENGLISH NORMAL INCREMENT TENURE-TRACK

Show 500 rows per page of 1 total results View: active | archived | both

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Now your dashboard should have a much more manageable number of files to work with.

# The Intake/Exemption (I/E) Form



Submittable Submissions Projects Forms Reports Funds More

UM Office of the Provost

Dashboard  
Standard Reports  
Advanced Reports

Show Filters first prev page 1 of 1 (1 results) next last

Results are being filtered. (1 total results)  
Project: Faculty Evaluation - Intake/Exemption Form (TEST)  
Clear Filters

Stage Assign Label Message Additional Forms Open Editing Accept Decline Complete Other

SCORE	STAGE	SUBMISSION	SUBMITTER	PROJECT	DATE	STATUS	ASSIGNED
	Admin	McClintock	Tom McClintock	Faculty Evaluation - Intake/Exemption Form (TEST)	9/22/2021	Unassigned	

Show 500 rows per page of 1 total results

View: active | archived | both

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On or before 1 week after 10/15/21 (depending on how many of your faculty have finished filling out the I/E form), you'll use the reporting tools to generate a report on all the I/E form responses from your faculty and download it as a spreadsheet you can provide to your FEC.

To start, click on "Standard Reports" from the "Reports" dropdown.

Submittable Submissions Projects Forms Reports Funds More

Reports View Your Site

Create Report Saved Reports Other Reports Downloads

**Projects**

Report Name \*

Faculty Evaluation - Intake/Exemption Form (TEST) (1 submissions)

**Labels**

Select one or more

**Date Range**

Sep 15, 2021 Sep 15, 2021

**Submission Status**

Select one or more

**Submission Rating**

☒ With ☒ Without

**Form Status**

☒ Active ☒ Archived

**Review Stage**

Select one or more

Data Preview

Fields

Submitter

UNIVERSITY OF MONTANA

In the “Fields” section on the right side of the screen, click the dropdown arrow next to “Faculty Evaluation –Intake/Exemption Form (AY 21-22)”. Please name your report “[Academic Unit] – I/E (AY21).”



Data Preview

Last	First Name	790#	Current Academic Rank	Please select your college:	Academic Unit (H&S):	Are you exempt or requesting exemption from evaluation this year?
McClintock	Thomas	790-1	Assistant Professor	College of Humanities & Sciences	Department of English	No - I'm neither exempt nor requesting exemption from evaluation this year?

Fields

- ☐ Title
- ☐ Last Updated
- ☒ Last Name
- ☒ First Name
- ☒ 790#
- ☒ Current Academic Rank
- ☒ Please select your college:
- ☐ Academic Unit (Law)
- ☐ Academic Unit (CAM):
- ☐ Academic Unit (COB):
- ☐ Academic Unit (COH):
- ☒ Academic Unit (H&S):
- ☐ Academic Unit (Library):
- ☐ Academic Unit (MC):
- ☐ Academic Unit (PJWCOC):
- ☐ Academic Unit (WAFCC):
- ☒ Are you exempt or requesting exemption from evaluation this year?
- ☒ Is your position tenure/tenure-track or

☐ Include Files
 ☐ Include Pdfs
 [Save Report](#)
[Download Report](#)

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Select all the fields other than “Title,” “Last Updated” and the “Academic Unit” fields that do not apply to your college. There is an “Academic Unit” field for each college so you’ll want to make sure you select the correct one.

Click “Download Report” and, in the Excel file that is downloaded, highlight those faculty members who are requesting exemption. Send the resulting file to your unit’s FEC for review.

Let your FEC that they need to return this file to you with their decisions on exemption requests noted before 11/15/21.

The screenshot displays the Submittable interface for the University of Montana (UM) Office of the Provost. The main heading is "UM Office of the Provost". Below this, there's a navigation bar with links: Submittable, Submissions, Projects, Forms, Reports, Funds, and More. A user profile icon with the initials "TM" is visible in the top right corner.

The main content area shows a submission list for the project "Faculty Evaluation - Intake/Exemption Form (TEST)". The list is filtered to show 1 result. The submission is assigned to "Tom McClintock" and is in the "In-Progress" status. The submission date is 9/22/2021. The submission is titled "Faculty Evaluation - Intake/Exemption Form (TEST)".

A modal window is open for assigning the submission. The modal has a "DONE" button and a search bar. The search results show "Tom McClintock" as the selected assignee. Other options include "Entire Team", "21-22 Sabbatical Review Com...", "FE Test Team", "FEC - CMMB - 2020", "FEC - Ecology & Evolution - 2...", and "FEC - Industrial Tech Fall 2020".

The bottom of the page features the University of Montana logo.

We'll cover assigning submissions in more detail shortly but for now just know that you need to assign all the submissions for your unit to yourself. Do not assign them to the FEC members or FEC chair.

Submittable
Submissions
Projects
Forms
Reports
Funds
More

?
TM

UM Office of the Provost
View Your Site

Show Filters

first
prev
page 1 of 1 (1 results)
next
last

Results are being filtered.  
(1 total results)

Project: Faculty Evaluation - Intake/Exemption Form (TEST)

Clear Filters

☒
Stage
Assign
Label
Message
Additional Forms
Open Editing
Accept
Decline
Complete
Other

SCORE	STAGE	SUBMISSION	SUBMITTER	PROJECT	DATE	STATUS	ASSIGNED
<input checked="" type="checkbox"/>	Admin 0/1 Review	McClintock	Tom McClintock	Faculty Evaluation - Intake/Exemption Form (TEST)	9/22/2021	In Progress	Tom McClintock

TENURE-TRACK

DEPARTMENT OF ENGLISH

NORMAL INCREMENT

H&S

Show 500 rows per page of 1 total results
View: active | archived | both

UNIVERSITY OF MONTANA

While the FEC is reviewing the exemption requests, you'll complete the review for the submissions for faculty members who are either automatically exempt or planning to submit an IPR.

First, click on the title of the submission you are completing a review for. The title is the faculty member's last name.

← Back to list

< 1 of 1 >

McClintock

In-Progress

Admin

Info

Assign

Label

More

DEPARTMENT OF ENGLISH

H&S

NORMAL INCREMENT

TENURE-TRACK

Project: Faculty Evaluation - Intake/Exemption Form (TEST)

Submitted by Tom McClintock on 09/22/2021

Instructions

Open Editing

This form will help your unit's Faculty Evaluation manager determine who will be evaluated and plans to submit an IPR this fall, who is automatically exempt, and who is requesting the FEC exempt them from evaluation.

If you have questions or need assistance in filling out this form, please contact your unit's Faculty Evaluation manager.

Last Name

McClintock

First Name

Thomas

790#

79-12-3456

Current Academic Rank

Reviews

Messages

Admin

0/1 Reviews

Average Score

Total Score

Tom McClintock (you)

Complete Review

Share review with submitter

UNIVERSITY OF MONTANA

Click the “Reviews” tab on the right side of the window if it’s not already selected and click “Complete Review.”

20

[Back to list](#)
< 1 of 1 >
McClintock

In-Progress
Admin
Info
Assign
Label
More

DEPARTMENT OF ENGLISH

H&S

NORMAL INCREMENT

TENURE-TRACK

### Project: Faculty Evaluation - Intake/Exemption Form (TEST)

Submitted by Tom McClintock on 09/22/2021

Instructions

This form will help your unit's Faculty Evaluation manager determine who will be evaluated and plans to submit an IPR this fall, who is automatically exempt, and who is requesting the FEC exempt them from evaluation.

If you have questions or need assistance in filling out this form, please contact your unit's Faculty Evaluation manager.

Last Name

McClintock

First Name

Thomas

790#

79-12-3456

Current Academic Rank

Open Editing

Activity

Reviews

Messages

exemption?

☐ Yes, they are requesting an exemption
 ☐ No, they're automatically exempt
 ☒ No, they will be submitting an IPR

**Great! The faculty member will submit their IPR as planned.**

Once you have submitted this review, please set the status of this file to "completed" and use the [TEMPLATE NAME] to provide the faculty member with instructions for submitting their IPR.

The FEC Chair has reviewed the exemption request and I, the

☒ faculty evaluation manager, am authorized to submit this response on their behalf.

Submit Review

Last Saved a few seconds ago

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Proceed through the review and submit.

Back to list
1 of 1
McClintock

In-Progress
Admin
Info
Assign
Label
More

DEPARTMENT OF ENGLISH
HAS
NORMAL INCREMENT
TENURE-TRACK

### Project: Faculty Evaluation - Intake/Exemption Form (TEST)

Submitted by Tom McClintock on 09/22/2021

**Instructions**

This form will help your unit's Faculty Evaluation manager determine who will be evaluated and plans to submit an IPR this fall, who is automatically exempt, and who is requesting the FEC exempt them from evaluation.

If you have questions or need assistance in filling out this form, please contact your unit's Faculty Evaluation manager.

**Last Name**

McClintock

**First Name**

Thomas

**790#**

79-12-3456

**Current Academic Rank**

Accept
Decline
Mark Complete
In-Progress
Withdraw

ActivityReviewsMessages

Admin1/1 Reviews

	Average Score	Total Score
Tom McClintock (you) 09/22/2021		

Download All Reviews
Share review with submitter

Now we'll set the status to complete.  
Click the dropdown that says "In Progress" then click "Mark Complete."

Back to list < 1 of 1 > McClintock In-Progress Admin Info Assign Label More

DEPARTMENT OF ENGLISH H&S NORMAL INCREMENT

**Project: Faculty Evaluation - Intake/Exemption**  
Submitted by Tom McClintock on 09/22/2021

**Instructions**  
This form will help your unit's Faculty Evaluation manager determine who is requesting the FEC exempt them from evaluation.  
If you have questions or need assistance in filling out this form, please contact the Faculty Evaluation Manager.

**Last Name**  
McClintock

**First Name**  
Thomas

**790#**  
79-12-3456

**Current Academic Rank**  
Associate Professor

**Response template:** Faculty Evaluation - I/E - Submitting IPR

**Email subject:** Faculty Evaluation: Information on Submitting your IPR

**Email message:**  
B I U H1 H2 H3

Dear Professor McClintock,  
Thank you for completing the Intake/Exemption form for this year. Your responses will help the Faculty Evaluation Manager for your unit organize and track the process. The next step is to assemble and submit your IPR.  
Instructions on how to submit your IPR are available here: <https://www.umt.edu/provost/faculty/faceval/paperless.php>  
Information about the faculty evaluation process can be found here: <https://www.umt.edu/provost/faculty/faceval/default.php>  
If you have any questions about this process, please feel free to reach out to the Faculty Evaluation Manager for your unit.  
Sincerely,

**Activity** **Reviews** **Messages**

**Admin** 1/1 Reviews

Average Score	Total Score
Tom McClintock (you)	09/22/2021

[Download All Reviews](#)

[Share review with submitter](#)

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In the window that pops up, select either the Faculty Evaluation – I/E Form – Automatically Exempt or the Faculty Evaluation – I/E Form – Submitting IPR (whichever is appropriate) under the “Response Template” dropdown.

Back to list < 1 of 1 > McClintock

DEPARTMENT OF ENGLISH H&S NORMAL INCREMENT

### Project: Faculty Evaluation - Intake/Exe

Submitted by Tom McClintock on 09/22/2021

#### Instructions

This form will help your unit's Faculty Evaluation manager determine who is requesting the FEC exempt them from evaluation.

If you have questions or need assistance in filling out this form,

Last Name  
McClintock

First Name  
Thomas

790#  
79-12-3456

Current Academic Rank

You can choose a response template from the drop-down list above, or write a custom message from scratch.

Attachment:  
Drop a file or [select a file](#).

File will be attached to the email and saved with the submission history.

Send from:  
☐ Main address (OfficeoftheProvost@umontana.edu)  
☒ My address (thomas2.mcclintock@umontana.edu)

Add internal note:  
Internal notes are not viewable by the submitter.

[Cancel](#) [Mark Completed and Send Response](#)

Activity **Reviews** Messages

Admin 1/1 Reviews

Average Score	Total Score
Tom McClintock (you)	09/22/2021

[Download All Reviews](#)

[Share review with submitter](#)

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Scroll down and select “My Email” under “Direct Replies and Notifications To.”  
Then, click “MARK COMPLETED and Send Response(s).”



← Back to list < 0 of 1 > McClintock In-Progress Admin Info Assign Label More

DEPARTMENT OF ENGLISH H&S NORMAL INCREMENT TENURE-TRACK

### Project: Faculty Evaluation - Intake/Exemption Form (TEST)

Submitted by Tom McClintock on 09/22/2021

**Instructions** [Open Editing](#)

This form will help your unit's Faculty Evaluation manager determine who will be evaluated and plans to submit an IPR this fall, who is automatically exempt, and who is requesting the FEC exempt them from evaluation.

If you have questions or need assistance in filling out this form, please contact your unit's Faculty Evaluation manager.

**Last Name**  
McClintock

**First Name**  
Thomas

**790#**  
79-12-3456

**Current Academic Rank**

**Messages**

Dear Professor McClintock,

Thank you for completing the Intake/Exemption form for this year. Your responses will help the Faculty Evaluation Manager for your unit organize and track the process. You have requested an exemption and that request will be evaluated by your unit's FEC. You will be informed of their decision by email shortly.

Information about the faculty evaluation process can be found here:  
<https://www.umt.edu/provost/faculty/fecval/default.php>

If you have any questions about this process, please feel free to reach out to the Faculty Evaluation Manager for your unit.

Sincerely,  
 UM Office of the Provost

[Attach files](#) or drag and drop here.

[Cancel](#) [Send](#)

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For submissions requesting exemption, first, click the “Messages” tab and click “Send Message.”

We’ll also cover messaging in more detail later when we talk about sending the faculty members their reviews.

You’ll use the Faculty Evaluation – I/E Form – Exemption Request Received template make sure you’ve selected the faculty member (the submitter) as the recipient. Scroll down and click “Send.”

Once the FEC has completed their review and returned their decisions to you, you can return to these submissions to set the status to “Complete,” just like you did with the faculty who are automatically exempt or planning to submit an IPR using either the Faculty Evaluation – I/E Form – Exemption Request Approved or Faculty Evaluation – I/E Form – Exemption Request Denied template, as appropriate.

# The IPR Form



Faculty Evaluation - IPR Submission (TEST)

Last Name \*

Please enter your last name.

First Name \*

Please enter your first name.

790 Number \*

Please enter your 790 number (e.g. 790-02-3456). Having this information will make it easier for HRIS to apply all salary increments.

College \*

☒ Alexander Blewett III School of Law

☐ College of Business

☐ College of Health

☐ College of Humanities & Sciences

☐ College of the Arts and Media

☐ Maureen & Mike Mansfield Library

☐ Missoula College

☐ Phyllis J. Washington College of Education

☐ W. A. Franke College of Forestry & Conservation

Please select your college


Academic Unit (Law): \*

☐ Department of Public Administration & Policy

Tenure-Track or Non-Tenure-Track \*

☒ Tenure-Track

☐ Non-Tenure-Track



Now we get to the big, meaty bit: the IPR Submission Form itself. Just a quick overview of what your faculty will see when they go to submit so you'll have an idea of what questions they may ask you as they're working through this. First, of course, we have basic information—name, 790, college, academic unit, and if they're tenure track or not.

Tenure-Track or Non-Tenure-Track \*

☒ Tenure-Track
 ☐ Non-Tenure-Track

Current Title and Rank \*

☐ Instructor (Tenure-Track)
 ☐ Assistant Professor
 ☐ Associate Professor
 ☐ Full Professor

Date of Hire \*

Hired As \*

Have you been promoted while at UM? \*

☐ Not yet
 ☐ Yes, once
 ☐ Yes, twice
 ☐ Yes, three times

Have you been awarded tenure? \*

☐ Not yet
 ☐ Yes

Have you received a merit award? \*


☐ Not yet
 ☐ Yes

I hereby request the following action(s):

☐ Normal Increment
 ☐ Merit Award
 ☐ Tenure
 ☐ Promotion

\*NOTE\*

You may request any combination of these actions except promotion and merit.



Next, if they are tenure track, it'll ask their current title and rank, date of hire, what they were hired as, if they were promoted, if they've been awarded tenure, if they've received a merit award, and, finally, what action or actions they're requesting. Please note the note here: faculty cannot request merit and promotion in the same year. If one of your faculty members does request this combination, you'll need to open the submission for editing so they can go in and correct the issue. If you need to do that, please reach out to me directly and I'll walk you through the process.

Tenure-Track or Non-Tenure-Track \*

☐ Tenure-Track

☒ Non-Tenure-Track

Current Title and Rank \*

☐ Adjunct Instructor

☐ Adjunct Assistant Professor

☐ Adjunct Associate Professor

☐ Adjunct Full Professor

☐ Lecturer

☐ Clinical Faculty

☐ Research Assistant Professor

☐ Research Associate Professor

☐ Research Full Professor

☐ Visiting Professor

☐ Other

---

I hereby request the following action(s):

☐ Normal Increment

☐ Outstanding Performance Award

☐ Merit Award (externally funded/soft merit)

☐ Promotion (externally funded/soft promotion)

\*NOTE:

Please see CBAs 13.245 for a description of Outstanding Performance Awards.

You may select any combination of these except Outstanding Performance Award and Merit, Outstanding Performance Award and Promotion, Merit and Promotion

Just like with the tenure-track faculty, non-tenure-track faculty are asked their current title and rank but other than that, the only question asked of them is what action or actions they're requesting. Just like with the tenure-track faculty, there are combinations that are invalid: an OPA cannot be requested in conjunction with a merit or promotion and a merit cannot be requested with a promotion. Just like with TT faculty, reach out to me and I'll walk you through reopening submissions that accidentally request an invalid combination.

### IPR Submission

Directions: Please make sure your IPR includes evidence that you have met University as well as Unit Standards for the action you have requested.

You may attach multiple files if necessary. This field is limited to 20 individual files with a limit of 300mb but if you need to attach more or larger files, please contact the Provost's Office and we'll work with you to get them uploaded.

Please ensure files are named with the following convention "Lastname - IPR file # of total #)" (e.g. "Smith - IPR 1 of 5").

University Standards (CBAs 10.190) <https://www.umt.edu/provost/faculty/CBA/default.cfm>  
Unit Standards <https://www.umt.edu/provost/faculty/departmental/default.cfm>

Per UFA CBA 10.220 and MCFA CBA 10.210, IPRs should cover the performance period starting from the first day of the academic year and including Fall Semester, Spring Semester and applicable winter and summer terms). To determine the first day of past academic years, please refer to the Academic Calendar website: <https://www.umt.edu/provost/academiccalendar/default.cfm>

Your IPR should document performance for the respective types of advancement as follows:

Promotion to Associate Professor: All service in the current rank including prior service, if applicable, or the most recent seven (7) sequential years, whichever is less.

Promotion to Full Professor: All service since documentation was prepared for the last promotion, or the most recent seven (7) years, whichever is less.

Tenure: The entire probationary period including credited prior service.

Merit: The time since the documentation was prepared for the last granted merit or promotion, or the most recent seven (7) sequential years, whichever is less.

Outstanding Performance Award: The time since the documentation was prepared for the last granted award, or the most recent seven (7) sequential years, whichever is less.

Normal and Less-Than-Normal: The record of the previous year(s) as appropriate (see UFA CBA 10.210 and MCFA CBA 10.340 for the evaluation schedule of tenure and tenure-track faculty).

Attach your IPR \*

Choose File

Select up to 35 files to attach. No files have been attached yet. You may add 35 more files.

Acceptable file types: pdf, doc, docx, jpeg, gif, tif, tiff, png, svg, mp3, m4a, wav, ogg, aac, flac, aiff, wma, mp4, mov, avi, mpg, 3gp, 3iv, webm, wmv, m4v, mkv, xls, ppt, pptx, xlsx


☐ By checking this box, I sign this IPR and affirm it to be correct and complete to the best of my knowledge.

This digital signature and submission of the above IPR is the equivalent of the signature on the last page of a paper-based IPR.

Save Draft

Submit

✔ Last Saved a few seconds ago

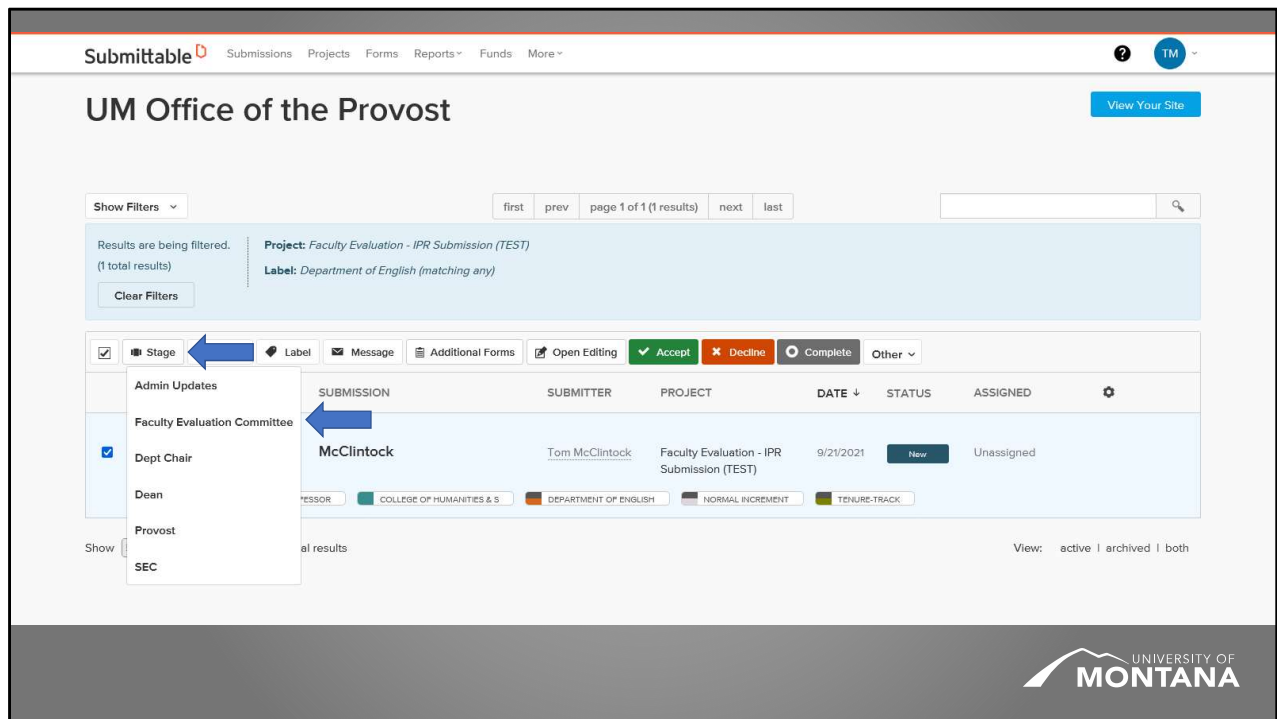


The last step, as they say, can be a doozy. This is where the faculty members will submit all the documents that comprise their IPR. For everyone’s sanity, we’ve asked that files be labeled with their last name then “IPR [number] of [number].”

The faculty member can upload up to 35 separate files in a variety of formats with a total upload size of 300mb through this form. If they do need more files or bigger files, contact me directly and I will work with you and the faculty member to make sure those are available for reviewers and archived along with the rest of the IPR at the end of the process.

# Setting Stages and Assignments





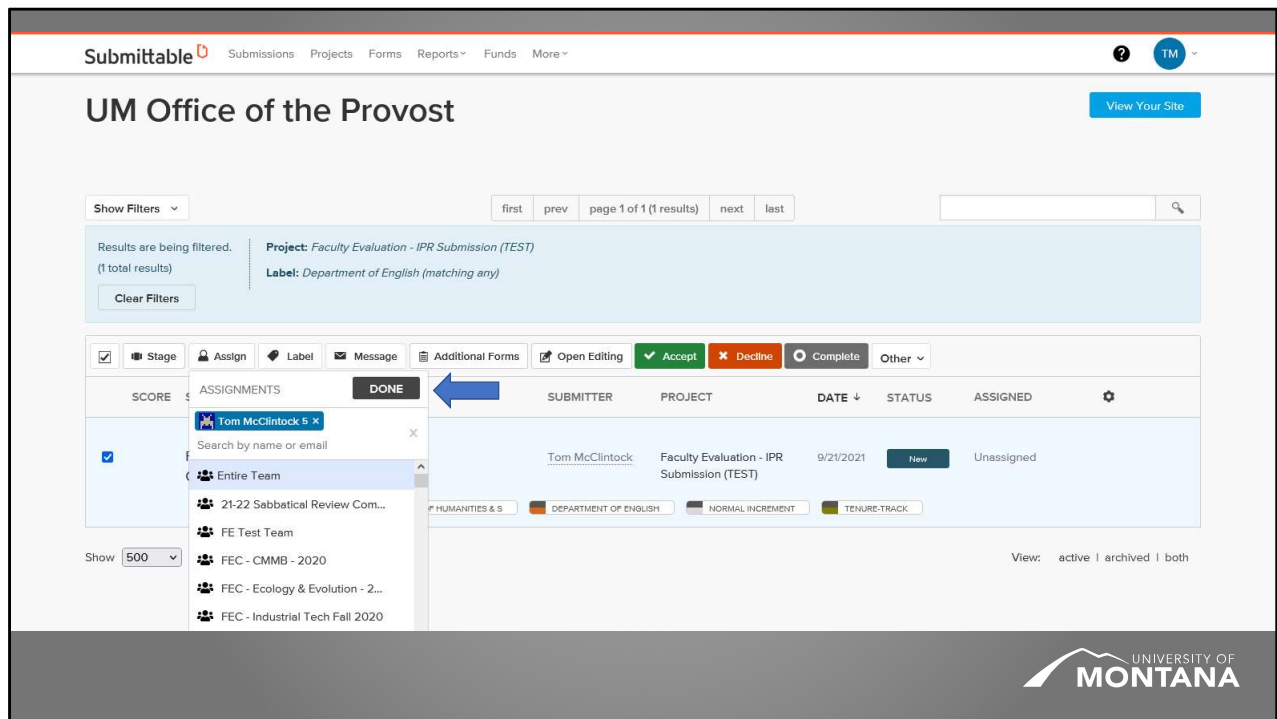
Once your faculty members have submitted their IPRs, it's time to begin assigning the submissions to the FEC so they can begin their review. To do that, first we have to change the stage.

Start by filtering your view to show only those submissions in the “Faculty Evaluation – IPR Submission (AY 21-22)” project belonging to your unit or units.

Please make sure you double and triple check that your filters are set properly! It would be very easy to accidentally assign submissions to the wrong people at this point.

Next, select all the filtered submissions, click the “Stage” button, and select “Faculty Evaluation Committee.”





Many of you have already provided me with the names of your FEC chairs and I'll be adding them to the OOP team as level 1 reviewers. I know that each unit is a bit different in how their FEC works so if your FEC chair plans to download and share IPRs with the rest of the committee so they can be reviewed in an internal process, that may be the only person that needs to be added.

However, if your entire FEC needs to access the IPR directly in Submittable, they will need to be added as level 1 reviewers as well. If that is the case, please submit a list of FEC members to me by October 15.

Go ahead and select all the filtered submissions and click the "Assign" button.

If you have multiple units, again, make sure you have filtered down to a single unit so you don't inadvertently assign submissions to the wrong people.

You can search for the members of your unit's FEC by name or email.

Once you've selected everyone that should be assigned, click the "Done" button.

The people you've assigned will get an email from [notifications@email.submittable.com](mailto:notifications@email.submittable.com) with the subject line "New Submission assignment from UM Office of the Provost" letting them know they have access to the IPR to review.

We recommend that you set up a rule in Outlook to always deliver those emails to

your inbox (not spam or junk or the other tab with focused inbox turned on) and that you encourage your faculty to do the same.

You'll use these same steps to set the submissions to the Chair/Director or Dean stage and to assign them to those individuals to review.

We'll leave the review stages and assignments here for now and come back to them in a bit. Let's turn our attention to the SEC.

# The SEC Stage



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ASSISTANT PROFESSOR COLLEGE OF HUMANITIES & S DEPARTMENT OF ENGLISH NORMAL INCREMENT TENURE-TRACK

Project: Faculty Evaluation - IPR Submission (TEST)  
Submitted by Tom McClintock on 09/21/2021

Last Name  
McClintock

First Name  
Thomas

790 Number  
790-12-3456

College  
College of Humanities & Sciences

Academic Unit (H&S):  
Department of English

Tenure Track or Non-Tenure Track

Open Editing

Activity Reviews Messages

Reviewer	Reviews
Admin Updates	No Review Required
Faculty Evaluation Committee	No Review Required
Dept Chair	No Review Required
Dean	No Review Required
Provost	No Review Required
SEC	1/1 Reviews

Reviewer	Average Score	Total Score
Tom McClintock (you) 09/23/2021		

Download All Reviews

Share review with submitter

UNIVERSITY OF MONTANA

The SEC is a bit of an outlier in the whole FE process. I spoke with a few of you yesterday to determine the best path forward on this.

Your SECs should already have access to course evaluation reports for your faculty members and have begun reviewing them.

When they have completed their review, they should provide their report to you.

A few units have created their own custom PDF that they are using for this stage but I've also created a fillable PDF template that you can use which will be available on the Faculty Evaluation page of our website. You can also use the SEC review form within Submittable if that's easier.

If you do wish to use the internal review form, set the stage to SEC and assign the submissions to yourself.

Then, just like with the I/E forms, click into the submission and, under the review tab, click the "Complete Review" button for the SEC stage.

You can either copy and paste the summary in a text entry window or you can upload the summary files and click "Submit Review" when you're done.

If you choose this option, you'll also need to download the review by clicking the download link next to the review you just submitted.

Whatever option you choose, it will ultimately be uploaded, sent to the faculty member, and attached to the IPR submission via an internal field in the same way

that the reviews from the FEC, Chair/Director, and Dean are and we'll cover that process shortly.

# The FEC, Chair/Director, and Dean Stages



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Faculty Evaluation Committee
Info
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ASSISTANT PROFESSOR
COLLEGE OF HUMANITIES & S
DEPARTMENT OF ENGLISH
NORMAL INCREMENT
TENURE-TRACK

### Project: Faculty Evaluation - IPR Submission (TEST)

Submitted by Tom McClintock on 09/21/2021

Last Name: McClintock [Open Editing](#)

First Name: Thomas

790 Number: 790-12-3456

College: College of Humanities & Sciences

Academic Unit (H&S): Department of English

Tenure Track or Non-Tenure Track

Activity

Reviews

Messages

Admin Updates	No Review Required
Faculty Evaluation Committee	No Review Required
Dept Chair	No Review Required
Dean	No Review Required
Provost	No Review Required
SEC	Unassigned

Share review with submitter ⓘ

UNIVERSITY OF MONTANA

Returning to the FEC stage, now, by November 15, the FEC should have finalized its report and given it to you to upload. Let's cover that part of the process now. Again, the Chair/Director and Dean stages will be roughly the same in terms of steps. Start by making sure you've got your filters set properly to show all the submissions for your unit.

Next, click the title of the submission you want to upload a review for and scroll down until you see the "Internal Form" section.

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ASSISTANT PROFESSOR COLLEGE OF HUMANITIES & S DEPARTMENT OF ENGLISH NORMAL INCREMENT TENURE-TRACK

Please see UFA CBA 10.240 and MCFA CBA 10.230 for more information about materials received at FEC stage.

**INTERNAL: FEC Evaluation**

Choose File

Select up to 5 files to attach. No files have been attached yet. You may add 5 more files.

Acceptable file types: .pdf, .doc, .docx, .jpg, .jpeg, .png

Academic Unit Faculty Evaluation Manager - upload FEC evaluation file(s) here.

**INTERNAL: Chair/Director Evaluation**

Choose File

Select up to 5 files to attach. No files have been attached yet. You may add 5 more files.

Acceptable file types: .pdf, .doc, .docx, .jpg, .jpeg, .png

Academic Unit Faculty Evaluation Manager - upload chair/director evaluation file(s) here.

**INTERNAL: Dean Evaluation**

Activity **Reviews** Messages

Admin Updates	No Review Required
Faculty Evaluation Committee	No Review Required
Dept Chair	No Review Required
Dean	No Review Required
Provost	No Review Required
SEC	Unassigned

Share review with submitter ⓘ

UNIVERSITY OF MONTANA

Click the down arrow to show the internal upload fields then click the “Edit” button. Scroll down until you see the “INTERNAL: FEC Evaluation” field. You can either click the “Choose File” button or drag and drop files into the box bounded by a dotted line to upload the files.



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ASSISTANT PROFESSOR COLLEGE OF HUMANITIES & S DEPARTMENT OF ENGLISH NORMAL INCREMENT TENURE-TRACK

### Internal Form

**Faculty Evaluation - IPR Submission (AY 21-22)**  
Last edited on 09/23/2021

**Update**

**Instructions for uploading internal documents (for Faculty Evaluation Managers)**  
Naming convention: "Last, First - Stage Name - DocTitle - 790"

**INTERNAL: SEC**

**Choose File**

Select up to 5 files to attach. No files have been attached yet. You may add 5 more files.  
Acceptable file types: .pdf, .doc, .docx, .jpg, .jpeg, .png, .xls, .xlsx  
Academic Unit Faculty Evaluation Manager - upload SEC evaluation file(s) here.

**INTERNAL: Outside Letters of Support**

**Reviews**

Reviewer	Status
Admin Updates	No Review Required
<b>Faculty Evaluation Committee</b>	<b>No Review Required</b>
Dept Chair	No Review Required
Dean	No Review Required
Provost	No Review Required
SEC	Unassigned

Share review with submitter ⓘ

UNIVERSITY OF MONTANA

Click the down arrow to show the internal upload fields then click the “Edit” button. Scroll down until you see the “INTERNAL: FEC Evaluation” field. You can either click the “Choose File” button or drag and drop files into the box bounded by a dotted line to upload the files. Once you’ve uploaded the files, scroll back up and click the “Update” button. Next, you’ll send the review to the faculty member along with the Sign/Appeal additional form. At the Dean stage, that’s replaced by the “Sign/Acknowledge” additional form, but the steps are essentially the same.

# Messaging and Sign/Appeal and Sign/Acknowledge Additional Forms



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ASSISTANT PROFESSOR COLLEGE OF HUMANITIES & S DEPARTMENT OF ENGLISH NORMAL INCREMENT TENURE-TRACK

Project: Faculty Evaluation - IPR Submission (TEST)  
Submitted by Tom McClintock on 09/21/2021

Last Name  
McClintock

First Name  
Thomas

790 Number  
790-12-3456

College  
College of Humanities & Sciences

Academic Unit (H&S):  
Department of English

Tenure Track or Non-Tenure Track

Open Editing

Activity Reviews **Messages**

The Faculty Evaluation Committee has completed their evaluation of your IPR and their recommendation is now available for you to review. Per UFA CBA 10.240 and MCFA CBA 10.230:

Within ten (10) working days of receipt of the recommendation from the Faculty Evaluation Committee, the faculty member may submit a written appeal to the Faculty Evaluation Committee regarding any aspect of the Faculty Evaluation Committee's recommendation or process. The appeal must state any matters which the Faculty Evaluation Committee is requested to consider as well as the remedial action desired. The appeal may present for consideration appropriate documentation that the faculty member omitted from his/her Individual

Attach files or drag and drop here.

Send

UNIVERSITY OF MONTANA

Starting where we left off having uploaded the FEC review into the internal field, the next step is to send the review to the faculty member and also send them the Sign/Appeal additional form.

Start by clicking on the “Messages” tab.

Then click “New Message.”

Leave yourself as the “From” and pick the faculty member (listed as the “Submitter”) as the “To” and select the “Faculty Evaluation – FEC Rec (use to send FEC rec.)” template.

Now, scroll down and either click the “Attach files” link or, as it says, you can drag and drop to attach the FEC recommendation to the message.

Finally, click “Send”

Back to list < 1 of 1 > McClintock

ASSISTANT PROFESSOR COLLEGE OF HUMANITIES & S DEPARTMENT

Project: Faculty Evaluation - IPR Submission  
Submitted by Tom McClintock on 09/21/2021

Last Name  
McClintock

First Name  
Thomas

790 Number  
790-12-3456

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Send from: \*

☐ Main address  
(OfficeoftheProvost@umontana.edu)

☒ My address  
(thomas2.mcclintock@umontana.edu)

Cancel and Close Send Additional Form

Activity Reviews Messages

Admin Updates	No Review Required
Faculty Evaluation Committee	No Review Required
Dept Chair	No Review Required
Dean	No Review Required
Provost	No Review Required
SEC	Unassigned

Share review with submitter

UNIVERSITY OF MONTANA

Now we'll send the FEC Sign/Appeal additional form.

Click the "More" dropdown menu.

Then click "Send Additional Form."

Now, in the window that pops up, select the "Faculty Evaluation FEC Sign/Appeal" additional form and select the "Faculty Evaluation – FEC S/A (use with FEC S/A additional form)" template.

Scroll down and select "My address" as the "Send from" then click "Send Additional Form."

# Questions?

