Understanding the Faculty Evaluation Process on Submittable

For Faculty Submitters
I’ll be covering the process of logging in to Submittable explain the Intake/Exemption form, provide an overview of the IPR form that you will use to submit your IPR, discuss the review stages the IPR moves through (SEC, FEC, Chair/Director, Dean, and Provost), cover what messages the Faculty Evaluation managers for your units and colleges will be sending you through Submittable, and explain the additional forms used to allow you to respond to those reviews. Then I’ll open it up to questions.
Let’s start with Logging in.
By now, the FE manager for your unit should have sent you the link to fill out the first of the forms in the faculty evaluation process, the Intake/Exemption (or I/E) form, along with some instructions I put together on logging in, so most of you have probably already got this down but I wanted to cover it one more time here just in case.

As I said, your FE manager should have sent you the I/E form link and will also be sending you the link to the IPR submission form soon. Whenever you access one of our form submission links, unless you’re already logged in to Submittable, you’ll be presented with a screen that looks like this.

We want to make sure that you’re logging in to Submittable using UM’s Single Sign On (or SSO) system—that’s the standard NetID login you use for most UM systems. First, start by clicking the link that says, “Have An Account? Sign In.”
Since you’re accessing a form from a UM Submittable 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.” That also 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.
Now we’ll take a look at the Intake/Exemption or I/E Form. Many of you have probably already completed this but a few may not have yet and we’ll also talk a bit about the “why” for this form in addition to the “how.”
The I/E form is fairly straightforward and has a twofold purpose. The first section is just asking for your name, 790#, and current academic rank.
Next, you’ll select your college.
Once you pick an option here, it’ll expand to ask you to select your academic unit.
Finally, you’re asked if you’re planning to submit an IPR this year or if you are either automatically exempt or requesting an exemption. Based on your selection here, you’ll be asked a few more questions.
If you say you are planning to submit your IPR (i.e. that you’re not exempt or requesting an exemption), it then asks if you’re in a tenured/tenure-track or non-tenure-track position. Next, it will ask you what action or actions you intend to request. This is the first part of the twofold purpose of the I/E form—it lets your unit’s FE manager know that you’re planning to submit an IPR and what you’re planning to request to give them some lead time on who in the unit is submitting an IPR and what they’re thinking about requesting.

You are free to change your mind about what action or actions you’re requesting—you’ll officially request them when you submit your IPR.

Since you’re attending a session for people planning to submit an IPR, you most likely chose this path but let’s look quickly at the automatic exemption/exemption request path.
If you say you are automatically exempt or requesting an exemption, we provide some information about exemptions and then ask why you are either automatically exempt or requesting an exemption.

This is the second part of the “why” for the I/E form. If you’re automatically exempt, it lets your FE manager know that and if you’re requesting an exemption, your FE manager will be providing that information to your unit’s FEC so they can determine if they will approve or deny the request.
Now let’s take a look at the IPR form.
First, of course, we ask for your basic information—your name, 790, college, academic unit, and if you’re tenure track or not.
Next, if you are tenure track, it’ll ask your current title and rank, date of hire, what you were hired as, if you’ve been promoted, if you’ve been awarded tenure, if you’ve received a merit award, and, finally, what action or actions you’re requesting. Please note the note here: you cannot request merit and promotion in the same year. If you do request this combination, we’ll need to open the submission for editing so you can go in and correct the issue. If you need to do that, please reach out to your unit’s FE manager and they’ll work with me to walk you through the process.
Just like with the tenure-track faculty, if you’re non-tenure-track it’ll ask your current title and rank but, other than that, the only question asked of you is what action or actions you’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. Also like with TT faculty, reach out to your FE manager and we’ll walk you through reopening your submission if you accidentally request an invalid combination.
Finally we come to the part where you upload the documents that comprise your IPR. For clarity, we ask that files be labeled with your last name then “IPR [number] of [number]” (i.e. Lastname – IPR 1 of 5).

You can upload up to 74 separate files in a variety of formats with an individual size limit of 400mb and a total upload size of 800mb through this form. If you need more files or bigger files, contact your unit’s FE manager and they will work with me to make sure those are available for reviewers and archived along with the rest of the IPR at the end of the process.
Once you’ve submitted your IPR, it will move through several review stages: the SEC, FEC, Chair/Director, Dean, and Provost reviews. With each stage, you’ll be sent one or more messages through Submittable’s built in messaging system and you’ll also be sent additional forms that will let you indicate that you agree with or wish to appeal the FEC and Chair/Director reviews or that ask you to acknowledge receipt of or indicate you wish to appeal the recommendation of your dean.
Let’s start by looking at the messages you’ll be sent through Submittable. At each stage, you’ll get one or more messages sent to you through the Messaging system built in to Submittable. Those messages show up in your email and they’ll all appear to come from “UM Office of the Provost.” The actual email address they come from is a “reply to” email with a bunch of random letters and numbers “@email.submittable.com.”
We recommend setting up a rule to ensure that all emails coming from Submittable are directed to your inbox, not spam, trash, or “other” if you have focused inbox turned on. To do that, just go to the File menu in Outlook then click on “Manage Rules & Alerts” under Account Information.
Click the “New Rule” button.
Click the “New Rule” button. Then, in the Rules Wizard, with the “Move messages from someone to a folder” template selected, click Next.
Deselect “from people or a public group” and select “with specific words in the sender’s address” in Step 1.
Then, click “specific words” in Step 2.
Type in “@email.submittable.com” in the field and click “Add”. Then, click OK.
Next, click “specified” in Step 2.
If you’d like to create a new folder, go ahead and click “New...” otherwise make sure your inbox is highlighted and click OK.
Finally, go ahead and click “Finish.”
You can click “OK” to close out of the Rules and Alerts window.
Returning now to reviews, at the end of each stage, your FE manager will send you the associated recommendation for you to review. That will come via the Submittable messaging system to your email. To access the recommendation, click the “Download in Submittable” link at the bottom of the email.
Then, in the browser window that is opened, click on the filename to download it.
Your FE manager will also send you an email via the Submittable messaging system asking you to fill out an additional form indicating that you have received the recommendation or wish to appeal it (or, in the case of the Dean’s recommendation, that you acknowledge receipt or wish to appeal). To access the form, click the “View Form” link at the bottom of the email.
That will open a browser window with the form. First, select Yes or No.
If you select “Yes” it will ask you to check a box that will serve as your signature. Then, just click “Submit Form” to submit your agreement (or acknowledgement).
If you select “No,” indicating that you wish to appeal the recommendation, you will be provided with information about the appeal process. That process takes place outside of Submittable using the method your unit used prior to the implementation of this paperless process. Your FE manager will reach out to you to coordinate this. Click “Submit Form” to submit your appeal.
Questions?