

**Guidelines for Preparing**

**ANNUAL EVALUATIONS**

***For***

**All Academic Titles**

**2016**





**Table of Contents**

Introduction 2

Tips for Writing and Submitting an Effective AE………………………………… 3

What Changed from Last Year? ……………………………………………………… 4

General Directions …………………………………………………………………………………… 6

Position Description …………………………………………………………………………… 7

Section A – Self-Assessment/Narrative ………………………………………………… 8

Section B – Tables …………………………………………………………………………………… 11

Section C – Advisor, Specialist, Academic Admin/Coordinator Review-Goals 15

Section D - Administrative Review ……………………………………………………… 16

Questions 17

Common Mistakes ……………………………………… 18

Appendix A – Timeline for Annual Evaluation …………………………………… 19

Appendix B – Instructions for Uploading your Position Description …… 20

Appendix C – Guide to Uploading AE Online Verification …… 21

**Introduction**

The information in this booklet pertains to the Annual Evaluation (AE) for all Academic Titles. You can access this booklet on-line at:  *<http://ucanr.edu/aeguidelines> (Guidelines for Preparing Annual Evaluations).*

Annual evaluations are required of all ANR Academics (ANR Administrative Handbook

Section 336) *at: <http://ucanr.edu/adminhandbook>.*

This Annual Evaluation process assesses the Academic’s annual activities and provides

the Academic’s supervisor with an update on accomplishments and future directions.

In general, the AE should include evidence of the past year’s activities, accomplishments, impacts, and professional stature commensurate with a specific academic rank. The AE provides an opportunity to develop shared performance goals to support academic excellence.

There are TWO templates for Annual Evaluations:

* Academics who have served more than 6 months will use the full, Section A through C template.
* Academics who have served less than 6 months will use the abridged, A & C template.
* Academics who begin their career after the fiscal review period ending September 30th will be assigned goals only.
* CE Specialists who are assigned to a campus should not complete the template.

A timeline describing the reporting periods for the Annual Evaluation is in **Appendix A**. Instructions for uploading your position description are in **Appendix B.**

What you should know:

1. The self-assessment narrative is limited to 6 pages.
2. Program narratives are organized according to major themes.
3. For more specific information on table and sections, see “Using Thematic PR Format” in Appendix H of the *Guidelines for Preparing the Thematic Program Review Dossier at <http://ucanr.edu/sites/anrstaff/files/227142.pdf>*

**Tips for Writing and Submitting an Effective Annual Evaluation**

1. Completing a thorough Annual Evaluation should make your PR assembly process less time consuming.
2. Write for the intended audience: County Director, Immediate Supervisor. **Clearly describe your role(s) and make the impacts of your efforts obvious to the reader(s).**
3. Write a concise, readable, and comprehensive document that explains your program to supervisors.
4. Prepare your AE using Times New Roman Font, size 11 or 12, with single-spaced text and 1-inch margins on all sides of each page.
5. Use the most current edition of the American Psychological Association (APA) Publication Manual (6th Edition) or other current writing style handbook, as appropriate for your discipline, as a guide for all grammatical, punctuation, and bibliographic citations (see useful Websites). Your supervisor(s) expect an AE that is organized and formatted according to these instructions and will better enable you to evaluate your accomplishments if you follow them carefully.

F. Where possible, avoid acronyms. However, if acronyms are used, be certain to define them in the text. Also, consider explaining them in an alphabetically sorted Appendix.

G. Use the first person and active voice wherever possible in describing your activities and accomplishments. Use of the word “I” is not only acceptable, it is preferable as it identifies what you contributed. For example, state “I presented” rather than “Information was presented.”

H. Proofread carefully to minimize typographical errors.

I. Make sure you highlight your activities that support UC ANR’s visibility and effectiveness such as:

* Successful collaborations (internal and external)
* Mentoring of colleagues (formal and informal)
* Efforts to strengthen the UC ANR network (formally called the “continuum”)
* Multi-county and/or multi-program assignments
* Leadership roles
* Advocacy efforts
* Outreaching to clientele using new technologies such as social media websites.

J. **All documents must be uploaded in** **pdf format**.

**Reminders of changes**

* Clarifications to the Bibliography section: Peer-reviewed publications included in the Bibliography must be published in searchable, peer-reviewed journals. You can include ‘In Press’ publications but ‘In Press’ gives credit only once, either in your current PR listed as ‘In Press’ or in your next PR when it is officially published.
* In an effort to remove duplicative reporting of publications, a recommended procedure is to use the ANR Online Bibliography Software, linked to ANR Directory Profiles, to submit annual peer reviewed and non-peer reviewed publications. After inputting your publications, you can download a Microsoft Word retrieval for the Annual Evaluation/Merit & Promotion processes. Furthermore, your publication data will be available for accountability and leadership inquiries. This process has replaced the publications module in DANRIS-X (if applicable).
* The role of County Director is not considered ‘University Service’. It should be emphasized up front in a separate ‘Administrative’ section.
* ‘Public Service’ should be related to your area of expertise or position.
* When reporting on Affirmative Action, do not simply give numbers. Make note of what efforts you have made to underrepresented groups not previously in your program.
* **ALL CE Advisors** are required to enter into CASA.
* **All documents related to the AE must be uploaded as** **pdfs.**
* Academics who have served more than 6 months will be required to use the full AE template, Sections A through C. Academics who have served less than 6 months will be required to use the abridged AE template, A and C sections only. Academics who begin their career after the fiscal review period ending September 30thwill be assigned goals only.
* 13/24 month rule: For those Academics in three year terms, 24 months must be completed, along with supervisor’s approval, before an Academic is permitted the opportunity to seek advancement or go forward with an action. During an Academic’s first term (for those in two year terms), a minimum of 13 months (one full year plus one month toward the next review cycle) must be completed, along with supervisor’s approval, before an academic is permitted the opportunity to seek advancement or go forward with an action. Again, this applies to those who may be in the two-year term process.
* The online system has been changed to note that no longer will your position descriptions (PD) be approved online. The process is to send your completed position description to Academic Human Resources for review, who will then forward to the Vice Provost of Cooperative Extension or Associate Vice President for signature approval, followed by Statewide Program Directors, if applicable. It is the responsibility of the academic to update their PD when responsibilities and/or reporting authority has changed.

**General Directions**

Key considerations for the development of your AE include:

 Be brief and concise.
 Limit your Self-Assessment/Narrative to 6 pages.

 There is no page limit for Tables Section B.

 The bibliography should highlight those publications developed during the period under review (October 1, 2014 – September 30, 2015) and not previously reported. You can include ‘In Press’ publications but ‘In Press’ gives credit only once, either in the PR listed as ‘In Press’ or in your next PR as published.

 You have the option of using DANRIS-X to generate information for your

AE, Sections A and B.

There are various steps involved in the completion of an Annual Evaluation

|  |  |  |  |
| --- | --- | --- | --- |
| Step | Who | Description | Deadline |
| 1 | Academic | * Upload the current approved Position Description(s).
* If your Position Description has not changed since the most recent review then there is no need to upload it.
 | Requirement of AE or PR – February 1, 2017 |
| 2 | Academic | Upload the completed Annual EvaluationSections A-B-C as one document\* or Abbreviated AE/goals (Section A & C)\*\* or goals as assigned\*\*\* | February 1, 2017 |
| 3 | ImmediateSupervisor | * Review Academic’s AE Sections A, B, and C.
* Meet with Academic.
* Complete and upload Section D.
 | March 20, 2017 |

* Academics who have served more than 6 months

\*\* Academics who have served less than 6 months

\*\*\* Academics who begin their career after the fiscal review period ending September 30th

* All Annual Evaluation Templates are available on the Academic Personnel Website:

<http://ucanr.edu/acadaemicpersonnel> (go to annual evaluation link on left hand side)

**Position Description**

The Position Description (PD), along with the academic criteria, provides the basis for evaluating your AE. Your PD must accurately reflect your assignment. There is an updated position description template available at <http://ucanr.edu/sites/anrstaff/Personnel_Benefits/Academic_Personnel/Academic_Postiton_Description_Template/>*.* This is a required element of the annual evaluation process. It is the academics responsibility to update their PD when there is a change in duties, responsibilities and/or reporting authority.

 Your PD must include: your name, position title, effective date, purpose and clientele, academic program major responsibilities, program leadership/administrative responsibilities (if applicable), affirmative action, relationships and qualifications.

 Your PD must be signed and dated by you and your supervisor. For county based academics, the designated primary County Director and/or supervisor will have the responsibility to complete and sign the position description for an academic assigned to his/her county. All other cross-County Director’s and/or supervisors should be given an opportunity to review the position description for completeness before it is forwarded for final review by Academic Human Resources (AHR). Once reviewed, the position description may be signed by Chris Greer, Vice Provost of Cooperative Extension and/or Wendy Powers, Associate Vice President and could also include additional signatures by Statewide Program Directors. The AHR will return the signed PD to you for uploading into your AE or into the PR system.

 The Performance Review/Annual Evaluation System has the capacity to maintain a library of position descriptions from throughout your ANR employment history. A scanned copy of your signed position description is maintained in Academic Human Resources as the office of record.

 Use an addendum to reflect special short-term assignments that do not warrant a revised PD, such as serving as Acting County Director or temporary cross- county assignment.

***SECTION A: SELF ASSESSMENT/NARRATIVE* General Performance and Accomplishments**

(Limit 6 pages, 11- 12 pt. font)

**STATEMENT OF ASSIGNMENT**

(*You can retrieve this information from DANRIS-X or your position description)*

 Changes in responsibilities (if applicable)

* Programmatic Assignment of FTE (ANR knowledge area/FTE)
1. **PROGRAM SUMMARY NARRATIVE (limited to 6 pages)**
* For CE Advisors and CE Specialists: Emphasize your research, extension and creative activity including a) performance in extending knowledge and information; and b) performance in applied research and creative activity.
* For County Directors/Supervisors: Emphasize your administrative responsibilities.
* For Academic Administrators: Emphasize your administrative experience.
* For Academic Coordinators: Emphasize your coordination of academic programs.
* For Professional Researchers: Emphasize your independent research program/creative work.
* For Project Scientists: Emphasize your research/creative work.
* For Specialists: Emphasize your performance in research in specialized areas.

In general, structure your narrative to:

* Describe major themes and goals of your programs and your accomplishments in meeting last year’s goals.
* Refer to your Project Summary and Extension Activities Tables while writing this section. You do not need to duplicate the information included in these tables.
* Organize your program descriptions by themes, and consider including the following components when describing your activities under each theme.
* Clientele: People or groups of people that a program aims to serve.
* Goals: The purpose toward which an effort is directed.
* Inputs: What we invest: Faculty, staff, students, infrastructure, federal, state, and private funds, time, knowledge, etc. This step is often assumed and is not always articulated and is not required in DANRIS X.
* Methods (Activities/Outputs): Research, creative and extension activities to reach goals. Products created through such activities (meetings, trainings, extension programs, curricula, webinars, publications, etc.).
* Outcomes: Changed knowledge, attitudes, skills, behavior/practices resulting from the above efforts.
* Impacts (long term outcomes): Social/health, economic, environmental/physical benefits to individuals, behavioral changes, organizations, populations, communities. (You may want/need to include anticipated impacts, as well as immediate, short term, mid-term and longer term impacts associated with your ongoing efforts.)
* ANR has not adopted a strict logic model approach but encourages a program planning approach that allows the development of clear outcomes and impacts over time. It is your responsibility to summarize your work to best communicate what you have accomplished and what outcomes, results and/or impact(s) your work has produced.

Examples of Themes:

**4H Youth Development /CD**

Healthy Families and Communities

 Life skills

 Adolescent Development

* Volunteer Development

 Extension Education

 Science, Engineering and Technology

 Administrative Leadership

**Ag Productivity**

Sustainability and Viability of Agriculture

 Sustainable Food Systems

 Science and Agriculture Literacy

 Organic Crop Production

 Ag Productivity, Efficiency and sustainability

 Waste Management

**Natural Resources**

Sustainable Use of Natural Resources

 Sustainable Natural Ecosystems

 Sustainable Natural Resources

 Water Quality, Quantity and Security

 Water conservation and Irrigation Quality

**Nutrition Family Consumer Science**

**Healthy Individuals, Families and Communities**

 Prevention of Childhood Obesity

 Health Promotion

 Consumer Food Safety

 Food Security

 Administrative Leadership

**Example of a more narrowly focused Natural Resources Theme and goals**

**Landscape Management**

 Wildland Urban Interface

 Wildfire Education

**II. PROFESSIONAL COMPETENCE AND ACTIVITY**

 One to two paragraphs summarizing activities and evidence of professional competence.

**III. UNIVERSITY AND PUBLIC SERVICE**

 One to two paragraphs highlighting your contributions and activities in this area. Public Service should be related to your area of expertise or position.

* County Director/Supervisor roles are NOT University Service.

**IV. AFFIRMATIVE ACTION**

In one or two paragraphs, highlight specific efforts such as the following:

 Accomplishments in personnel or programmatic affirmative action.

 Document your **leadership role** in the county in affirmative action.

 Summarize your outreach efforts and accomplishments to reach underrepresented groups not previously in your program.

* Remember, all CE Advisors are required to enter AA into CASA.

**SABBATICAL LEAVE PLAN AND REPORT** (CE Advisors, CE Specialists)

Plans and reports for sabbatical leaves that have been completed during the review period must be uploaded.

**SECTION B: TABLES**

The format below is suggested although its use is optional. There are no page limits for the Tables section. Use 11-12 pt. font. For Professional Competence, University & Public Service, Bibliography, Project Summary, and Extension Activities, use either the table format below or a list format to document your activities. You can retrieve this information from DANRIS-X.

**I. PROFESSIONAL COMPETENCE--** List activities you have undertaken to improve your professional competence

a. Professional Development and Training

|  |  |  |
| --- | --- | --- |
| **Begin Date-****End Date** | **Location** | **Name and/or Description of Activity** |
|  |  |  |

b. Disciplinary Society/Professional Association – List disciplinary societies/professional associations

|  |  |
| --- | --- |
| **Disciplinary Society/Prof. Association Name** | **Membership/Meetings –****Attended/Activities** |
|  |  |

c. Evidence of Professional Competence – List awards, honors or recognition

|  |  |  |
| --- | --- | --- |
| **Begin Date-****End Date** | **Location** | **Name and/or Description of Award, Recognition,****Professional Presentation, Office or Activity** |
|  |  |  |

**II. UNIVERSITY AND PUBLIC SERVICE** – County/Local program, regional, state, national

a. University Service – List university service activities

|  |  |  |  |
| --- | --- | --- | --- |
| **Begin Date-****End Date** | **Activity** | **Org****Level** | **Your Contribution and Leadership Role** |
|  |  |  |  |

b. Public Service – List public service activities

|  |  |  |  |
| --- | --- | --- | --- |
| **Begin Date-****End Date** | **Activity** | **Org****Level** | **Your Contribution and Leadership Role** |
|  |  |  |  |
|  |  |  |  |

**III. BIBLIOGRAPHY (required for CE advisors and CE specialists)**

The bibliography table shall include only those publications developed during the year in review **and not previously listed**. Optional: You may load your complete bibliography if you prefer, highlighting those publications developed during the review period.

* Highly recommended new practice for bibliographies:
* Enter citations into ANR’s Online Bibliography software (part of the directory profile) at <https://ucanr.edu/portal/modules/dirbibliography.cfm> by either a) manually entering each citation OR by b) using the EndNote XML import process. Recorded webinar training can be found here: <http://ucanr.edu/sites/bibliographyproject/>
* Use the “Bibliography retrieval” link to download your citations into a Microsoft Word document for ANR Annual Evaluation. It will already be sorted by publication type and in chronological order.
* Format the retrieval as needed (i.e., delete publications that are not applicable).
* Update your bibliography listings annually for reporting purposes

|  |  |
| --- | --- |
| **Publication****Type**  | **Bibliographic Citation** |
|  |  |

 **Bibliography—Required Elements:**

* + *Peer Reviewed and Non-Peer Reviewed Sections:* Your bibliography should clearly describe peer reviewed efforts and non-peer reviewed efforts in separate sections in order to clearly assess academic growth. You do not have to rearrange your current bibliography other than having the required separate sections for peer reviewed and non-peer reviewed publications if you haven’t already done this. Be certain it is clear and reflects your program professionally.
	+ *Organizational Method:* Description of your organizational method (required at the beginning), including a Bibliography Summary that indicates the number of publications in each of your selected categories for this review period.
	+ *Peer Reviewed:* Examples of peer reviewed include scholarly journals; Cal Ag, ANR publications, UCIPM Pest Management Guidelines, curricula, Journal of Extension, and other peer-reviewed publications. (For the purposes of your PR, peer reviewed is defined as documents that are reviewed anonymously with the possibility of being rejected. Peer reviewed publications includes books that are anonymously reviewed even though there may not be a possibility of rejection.)
	+ *Non-Peer Reviewed:* Recommended format for non-peer reviewed Bibliography section is to designate type of publication within this section:
		- A – Popular (articles, newsletters, stories, UC Delivers, social media sites, etc.)
		- B – Technical (reports, curricula, and articles)
		- C – Abstracts, other outreach materials
	+ *Your Role:* For citations added during the current review period, describe each multi-author citation identifying your activity/role.
	+ *In Press:* You must scan and upload a letter of acceptance for any publication listed as “in press.”
	+ *Authorship:* While authorship of peer-reviewed publications is not currently required until Full Title rank, it is expected that Academic appointees will demonstrate academic growth and move towards balance in all criteria area over time, therefore peer reviewed publications remain increasingly important as you progress in rank and step. You need not be lead author but your academic role should be clarified, especially in collaborative efforts.

**IV. PROJECT SUMMARY TABLE**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project Title or****Creative****Activity/Duration** | **Role (PI, Co-PI, etc.)** | **Collaborators (with****affiliation)** | **Support (amount/duration)** | **Support****Source** |
|  |  |  |  |  |

* Support: Amounts listed are the funds directed to your program and do not include funds allocated to co-investigators and other research team members. Include in-kind and/or service value (volunteer time)

**V. EXTENSION ACTIVITIES**

a. Meetings Organized (Classes/Short Courses/Demonstrations/Field Days/Other)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Begin Date-****End Date** | **Meeting Name** | **Topic/no. of repetitions** | **Role** | **Location(s)** | **No. of****Attendees** |
|  |  |  |  |  |  |

b. Educational Presentations (including oral presentations and posters)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Begin Date-****End Date** | **Meeting Name/Event** | **Presentation Topic/****no. of repetitions** | **Location(s)** | **No. of****Attendees** |
|  |  |  |  |  |

1. Other(including websites, social marketing, blogs, collaborations with other agencies or organizations)

| **Begin Date- End Date** | **Description** | **No. of Instances** |
| --- | --- | --- |
|  |  |  |

1. Other (including TV and/or radio interviews/programs, newspaper/trade magazine interviews)

|  |  |  |  |
| --- | --- | --- | --- |
| **Begin Date-End Date** | **Interviewed/Written by****(Optional)** | **Topic** | **Media/Publication** |
|  |  |  |  |

**SECTION C: FOR ALL ACADEMICS - GOALS**

(Limit 6 pages, 11-12 pt. font)

This section is your opportunity to formulate goals for the next year. Provide a brief description of goals for the next review cycle and any barriers or obstacles to achieving these goals.

**I. GOALS FOR COMING YEAR: October 1, 2016 - September 30, 2017**

* Projects you intend to accomplish in the coming year under each criteria area, anticipated collaborators and anticipated outcomes.
* What needs to be accomplished to advance?
* You may want to organize your goals according to the themes you are going to use in your Program Review.

|  |  |  |
| --- | --- | --- |
| Specific Goals | Anticipated Collaborators | Anticipated Outcomes |
|  |  |  |
|  |  |  |

**II. BARRIERS/OBSTACLES IN ACCOMPLISHING YOUR PROGRAM GOALS**

Provide a brief description*.*

**Next Steps:**

Your supervisor will discuss his/her evaluation of your performance with you. You will see a section on the lower bottom of your screen that asks you to check a box to indicate that you discussed your Annual Evaluation with your supervisor.

As with all AEs, the employee has the opportunity to add their own comments.

**SECTION D: ADMINISTRATIVE REVIEW**

The AE is reviewed by the CD or Supervisor. There are three components of the administrative review which are shown as Section D in the AE template:

A. The CD or Supervisor will provide a narrative appraisal of what you have presented in Sections A, B, and C. This appraisal should address your performance in terms of balance and productivity and provide comments and constructive guidance to you. The CD or Supervisor will assess your annual evaluation and respond to the following comments:

 Indicate the areas in which the CD/Supervisor believes that the academic is meeting expectations for his/her level in each of the advancement criteria.

 Indicate areas of concern and suggestions for improvement.

 Approval or non-approval of your goals. If not, recommendations for revising your goals should be provided.

B. The CD or Supervisor will provide an assessment of your progress in terms of balance and productivity for your rank and step and your progress toward advancement to the next rank and step. The CD or Supervisor will discuss with you his/her assessment of your performance. The CD or Supervisor will select one of the following assessment statements:

 Demonstrates exemplary efforts beyond normal expectations

 Meets levels of expected program excellence

 Is Deficient in expected levels of program excellence

**Questions?**

**Question**: *Am I required to download information from DANRIS-X?*

 **Answer:** You are not required to use DANRIS-X. However, certain components of Section A and all of Section B Tables can be easily retrieved from DANRIS-X (for Advisors ). We are working on an integrated tracking system to better support academic performance reporting and ANR reporting goals.

**Question**: *Should the bibliography cover my entire career?*

**Answer**: **This is your choice.** (Optional). You may include your entire bibliography and highlight those publications developed during the year in review OR you must include publications developed during the time period covered in this annual evaluation year.

**Question**: *Can I defer submission of an annual evaluation?*

 **Answer:** You cannot defer the submission of an AE, the only reasons for not completing an Annual Evaluation are:

 An Academic is submitting a Program Review, although Section C is required annually and is now part of every PR.

 An Academic may defer an AE if he/she is on sick leave and/or family medical leave (FML).

 An academic may defer if he/she is on sabbatical leave.

**Common Mistakes**

* Summary paragraphs are important for each criteria, including Professional Competence, University Service, Public Service and Affirmative Action. A good summary paragraph “summarizes” your accomplishments; it does not just say “See Table.”
* The 4 required Criteria include: 1) Extending Knowledge and Information;

2) Applied Research and Creative Activity; 3) Professional Competence and Professional Activity; and 4) University and Public Service. (Affirmative Action is a required element but is not one of the 4 criteria).

* Not correctly categorizing ‘University Service’ and ‘Public Service’.
* Using the wrong form – if you are unsure, ASK. This includes County Directors and Supervisors not using the correct forms for Merits and Promotions – just reviewing Goals is not correct. There are supervisor review forms for specific actions (all found on the academic personnel website listed under the tab “Merit and Promotion Process and Trainings”) <http://ucanr.edu/academicpersonnel>
* County Directors not writing up their Administrative duties.
* In Project Summary Table – ‘Total Funding’ should be the total amount of the grant AND how much of that total you are responsible for.
* Do not list every individual ‘blog and tweet’ – summarize – ex. 6 UC Green Blog Stories; 25 Tweets.
* Articulate ‘Outcomes’ and ‘Impacts’ after each theme or program/project within the theme, not as one list at the end.

**APPENDIX A: 2016-2017 Timeline for Annual Evaluation**

|  |  |  |
| --- | --- | --- |
| Steps | Due Date | Action |
| Preparation of Annual Evaluation (AE) or Abbreviated AE/GoalsFor Full AE: Period of October 1, 2015 to September 30, 2016For Abbreviated AE: Period as indicated through September 30, 2016Goals: Period of October 1, 2016 – September 30, 2017 | **February 1, 2017**  | Completion and submission of sections A, B, and C of AE by Academic not seeking a merit or promotion and with more than 6 months.Completion and submission of sections A and C by Academic with less than 6 months service.Completion of section C by Academics who begin their career after the fiscal review period ending September 30th. |
| Review of AE by Supervisor |  **March 20, 2017** | Supervisor meets with Academic and completes Section D. |
|  Preparation of AE, Section C - Goals byAll Academics(part of AE, PR packets).  | On-going \* | All Academics will complete AE Section C  |

* **While the AE is due February 1st, it is critical that performance goals be developed and discussed frequently between Academics and their supervisor to avoid any “surprises” at merit/promotion cycles and to support success. This is especially critical for all academics in the term review process.**

**APPENDIX B: Instructions for Uploading your Position Description**

1. The Annual Evaluation/PR System offers the ability to maintain a library of position descriptions from throughout your ANR employment history.

2. You may electronically store as many approved Position Descriptions as you would like.

**To Upload Position Descriptions**:

 From the AE/PR system, click on ‘Position Descriptions’ from the list of files.

 Click on ‘Upload a new PD.’

* Enter the start date for the PD and end date if applicable. Use “08/10/2013” format.
* Name the position description. The PD can also be given a descriptive name, for instance: “Interim County Director – 2012.”
* Click ‘Browse’/’Choose File’ and locate the file on your computer. Files must be **Adobe Acrobat (PDF).**

 Click ‘Upload File.’

 The new file will be added to the list of Position Descriptions, and it will automatically be activated for the current action. Un-check the ‘Use PD this period’ box if this Position Description is not appropriate for this review period.

**To edit a Position Description in the system**

 Click on ‘Position Descriptions’ from the main menu

 From the PD menu, click on the date or name of the PD

 Modify text or upload a new document

 Click ‘update file’

**To delete a Position Description**

 From the PD menu, click on the date or name of the PD

 Click ‘Delete PD’

 Click ‘ok’ in the verification box

**APPENDIX C: Guide to Uploading AE Online Verification**

1. The Annual Evaluation/Goals process offers the online ability to check a box on your “PR page” indicating you have met with your supervisor, discussed the AE and your goals (a date will be displayed indicating you have done this). At this time, there is no expiration date for the academic to complete this.

2. OR; you have the option to include comments through a ‘Divergent File’ if you disagree with your supervisor’s evaluation.

* You may upload a divergent file into the online system any time after your supervisor has uploaded their evaluation/review. However, you only have 2 weeks after the supervisor deadline date to complete this task (so if due date is March 20th for the supervisor, your due date would be April 3rd).
* You will have a 2-day grace period to delete/edit/reload a divergent file/document into the online system, which allows you an editing option. Once this grace period expires, the supervisor will get an automated email notifying them that there is a document file for review from you.