

**Guidelines for Preparing**  
**ANNUAL EVALUATIONS**

*For*

**All Academic Titles**

**2017**

## Table of Contents

Introduction .....	2
Tips for Writing and Submitting an Effective AE.....	3-4
What Changed from Last Year? .....	4-5
General Directions .....	6
Position Description .....	7
Self-Assessment/Narrative .....	8-10
Tables .....	11-14
Goals .....	15
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.

The Annual Evaluation is composed of three sections: Narrative, Tables, and Goals. (Formally Section A, Section B, and Section C)

There are TWO templates for Annual Evaluations:

- Academics whose start date is before the fiscal review period ending of September 30<sup>th</sup>, will submit all three AE sections: Narrative, Tables, and Goals.
- Academics who begin their career after the fiscal review period ending September 30<sup>th</sup> will submit '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.

For more specific information on table and sections, see *2017-2018 PR Guidelines, E-Book for Academic Titles*:

[http://ucanr.edu/sites/anrstaff/Personnel Benefits/Academic Personnel/PR Dossier Examples/](http://ucanr.edu/sites/anrstaff/Personnel%20Benefits/Academic%20Personnel/PR%20Dossier%20Examples/)

## Tips for Writing and Submitting an Effective Annual Evaluation

- A. Completing a thorough Annual Evaluation should make your future PR assembly process less time consuming.
- B. Write for the intended audience: County Director or Immediate Supervisor. **Clearly describe your role(s) and make the impacts of your efforts obvious to the reader(s).**
- C. Write a concise, readable, and comprehensive document that explains your program to supervisors.
- D. 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.
- E. 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) should include documentation of your role and efforts to help guide new academics as they take on the complex and demanding job of developing an extension program. Sustained contributions to the personal and professional growth of the academic, successes, and outcomes should be highlighted.
  - 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.**

### What Changed From Last Year?

In a joint a meeting held on July 13, 2017 with the Academic Assembly Council Personnel Committee and the Peer Review Committee, changes to the annual evaluation process were recommended. Subsequently, Vice Provost of Cooperative Extension, Chris Greer, approved the recommendations and the following changes from 2016-2017 were continued and additional changes were made for 2017-2018.

#### Changes

- Annual Evaluation Sections A, B & C have been renamed, Section A is now referred to as Narrative; Section B is now referred to as Tables; and Section C is now referred to as Goals.
- The Abbreviated Annual Evaluation will no longer be used. Academics that begin their career after the fiscal review period ending September 30<sup>th</sup> (i.e. having worked only 4 months or less), will only submit Goals. Academics whose start date is before the fiscal review period ending of September 30<sup>th</sup> will submit all three sections: Narrative, Tables and Goals.

#### Reminders:

- The role of County Director, including Interim, is not considered 'University Service'. It should be emphasized up front in a separate 'Administrative' section of the Narrative
- Professional competence/ professional activity includes participation in training activities to enhance professional development, such as administrative trainings, professional conferences, or workshops. Professional competence also includes activities that reflect professional standing within the programmatic area, such as presenting at conferences or workshops, holding offices in professional societies, invited presentations, or reviewing/editing publications. State your role in professional competence activities.
- University service may occur at the local, division, state, national, or international level. Examples of potential University service activities include serving on a university committee or chair a workgroup, providing leadership in program teams, or advocacy efforts.

- 'Public Service' should involve activities and events in which the CE advisor uses their professional expertise to benefit groups or efforts outside the University. Examples may include serving on external boards or councils, participating in community events, and leadership of non-University collaborative groups.

## 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.
- The bibliography should highlight those publications developed during the period under review (October 1, 2016 – September 30, 2017) 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, Narrative and Tables.

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

Step	Who	Description	Deadline
<b>1</b>	Academic	<ul style="list-style-type: none"> <li>* Upload the current approved Position Description(s) that is associated with the review period.</li> <li>* If your Position Description has not changed since the most recent review then there is no need to re-upload it.</li> </ul>	<b>Requirement of AE or PR – February 1, 2018</b>
<b>2</b>	Academic	Upload the completed Annual Evaluation (Narrative, Tables and Goals) as one document* or Goals as assigned**	<b>February 1, 2018</b>
<b>3</b>	<b>Immediate Supervisor</b>	<ul style="list-style-type: none"> <li>* Review Academic's complete AE</li> <li>* Meet with Academic.</li> <li>* Complete and upload Administrator/Supervisor review</li> </ul>	<b>March 21, 2018</b>

\* Academics who began their career before the fiscal review period ending of September 30th

\*\* Academics who began their career after the fiscal review period ending September 30<sup>th</sup>

All Annual Evaluation Templates are available on the Academic Human Resources Website:

[http://ucanr.edu/sites/anrstaff/Personnel\\_Benefits/Academic\\_Personnel/Annual\\_Evaluation\\_Process/](http://ucanr.edu/sites/anrstaff/Personnel_Benefits/Academic_Personnel/Annual_Evaluation_Process/)

## Position Description

**It is the academics responsibility to keep their position description up to date in regards to duties and/or reporting authority.** Please work with your supervisor if you have any questions or concerns. You may also contact Academic HR. A current and accurate position description is an important piece of your merit and promotion dossier, and it is your responsibility to ensure the most current position description is uploaded in the PR system and that the relevant position descriptions for the period of review are added to your annual evaluation or merit/promotion package so they are available to PR reviewers. There is an updated position description template available at:

[http://ucanr.edu/sites/anrstaff/Personnel\\_Benefits/Academic\\_Personnel/Academic\\_Position\\_Description\\_Template/](http://ucanr.edu/sites/anrstaff/Personnel_Benefits/Academic_Personnel/Academic_Position_Description_Template/)

Along with the academic criteria, your PD provides the basis for evaluating your AE. Your PD must accurately reflect your assignment. **This is a required element of the annual evaluation process.**

- 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.
- Please refer to the AHR website ([http://ucanr.edu/sites/anrstaff/Personnel\\_Benefits/Academic\\_Personnel/Academic\\_Position\\_Description\\_Template/](http://ucanr.edu/sites/anrstaff/Personnel_Benefits/Academic_Personnel/Academic_Position_Description_Template/)) for information regarding the process for completing your PD.
- 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.

***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)

**I. 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: Document your administrative responsibilities and accomplishments.
- 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 (non-CE): 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, 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.

## 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, CE Specialists and other academic titles with research and extension responsibilities)

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 have not 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 publications may include scholarly journals (e.g. professional society journals, Cal Ag, Journal of Extension, etc.), UC ANR publications, UC IPM Pest Management Guidelines, books, curricula, professional society meeting abstracts (where peer reviewed and published), and other peer reviewed publications. For the purposes of your PR, "peer reviewed" is defined as documents that are reviewed anonymously (aka "blind review") with the possibility of being rejected. Peer reviewed journal articles included must be those

published in searchable, peer reviewed journals.

- *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, extensive/substantial blog posts similar in complexity to a newsletter article, 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 and Type	Topic/no. of repetitions	Role	Location(s)	Total 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

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

Begin Date- End Date	Description	No. of Instances

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

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

## 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, 2017 - September 30, 2018**

- 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.

## ADMINISTRATIVE REVIEW

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

- A. The CD or Supervisor will provide a narrative appraisal of what you have presented in your complete AE (or 'Goals' if assigned). 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 the Narrative and all Tables can be easily retrieved from DANRIS-X (for CE 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 Goals 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 where applicable. A good summary paragraph “summarizes” your accomplishments; it does not just say “See Table.”
- Identifying Affirmative Action as a criterion for advancement. Affirmative Action is a required element but is not one of the listed criteria. Please refer to the Ebook for the criteria required for advancement for each academic title.
- 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:  
[http://ucanr.edu/sites/anrstaff/Personnel\\_Benefits/Academic\\_Personnel/Merit\\_and\\_promotion\\_process/](http://ucanr.edu/sites/anrstaff/Personnel_Benefits/Academic_Personnel/Merit_and_promotion_process/)
- County Directors and other administrators not writing up their Administrative duties and accomplishments.
- 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: 2017-18 Timeline for Annual Evaluation**

<b>Steps</b>	<b>Due Date</b>	<b>Action</b>
<b>Preparation of Annual Evaluation (AE)</b> <b>For Full AE: Period of October 1, 2016 to September 30, 2017</b> <b>Goals: Period of October 1, 2017 – September 30, 2018</b>	<b>February 1, 2018</b>	<b>Completion and submission of AE by Academic not seeking a merit or promotion.</b>  <b>Completion of Goals by Academics who begin their career after the fiscal review period ending September 30<sup>th</sup>.</b>
<b>Review of AE by Supervisor</b>	<b>March 21, 2018</b>	<b>Supervisor meets with Academic and completes Administrative Review</b>
<b>Preparation of AE , Goals by All Academics-(part of AE, PR packets).</b>	<b>On-going *</b>	<b>All Academics will complete AE Goals</b>

**\* 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 21<sup>th</sup> for the supervisor, your due date would be April 4<sup>th</sup>).
  - 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.