

Annual Review Workflow User Guide: Reviewee

This guide is for faculty members who belong to schools participating in the Annual Review Workflow Pilot for the 2024 calendar year. Annual Review Workflow Pilot School's faculty will be using the Elements Workflow module to complete their Annual Reviews. The workflow module allows faculty to select and contextualize their activities with attachments within Elements.

Once the faculty member submits their exercise, Elements routes the exercise securely and directly to the reviewers, presenting them with a space for comments and attachments as needed. The exercise is locked to the reviewee after it's submitted, but the reviewee can continue view their exercise and any submitted reviews.

A separate User Guide is available on our website for those in Reviewer roles.

Accessing the Workflow

Once activated for your account, the Annual Review Exercise will then be available to you in Elements.



It will appear to you as an action in your action list, where "**Start**" or "**Continue**" will take you directly into the exercise.

My review	processes	
	showing 1 - 1 out of 1	
view: 10 🗸 p	er page	sort by: Created (newest first) 🗙
	2024 Faculty Annual Review (2-Step)	
	Stage: Faculty Submission	
	Started: 07 Jan 2025 • Updated: 07 Jan 2025	
		$CONTINUE \rightarrow$

You can also navigate to your reviews using the main menu. Using the drop-down menu , navigate to the "**Evaluation**" tab, selecting "**Review Processes**" from the "**My Submissions**" section. You will then arrive at the "**My Review Processes**" page, showing you the review exercise available to you. Your list should show you a single annual review exercise per year.

My Profile	Evaluation		
My Subm	issions		
> <u>Review Processes</u>			

Navigating the Workflow

When you first enter the exercise, you will land on an introduction page with basic instructions. The top row identifies the exercise you are working on as well as what stage the exercise is on. To enter and edit information into your exercise, it must be at the "Faculty Submission" stage. Once you "Submit" the exercise using the submit button in the top right, it will no longer be editable.

2024 Faculty Annual Rev	iew (2-Step) current stage: Faculty Submission	SUBMIT 🕦		
< EXIT EXERCISE				
Introduction	<pre> / Previous</pre>	NEXT >		
Overview	Please complete this exercise in accordance with your unit's annual review practices. You can save and return to the exercise as needed.			
Supporting Materials	As you navigate through the sections, Elements will automatically surface the activities you have logged in Elements for the review year. If you have used the Area of Excellence label scheme to tag activities, you can use the "Area Related" lists in each section to surface these items in the area you would prefer.			
Teaching Activities	Attachments can be attached through the "Supporting Materials" tab or on each section of the exercise.			
Research & Creative Works	Research & Creative Works When you have completed your exercise with the necessary activities and attachments, use the "Submit" button to send your exercise on for review. Once you submit your exercise, you will no longer be able to edit your responses.			
Service & Leadership	Service & Leadership For questions about the review process for your unit, please contact your academic leadership.			
	For questions about Elements @ IU, please contact the Elements Support Team at <u>elements@iu.edu.</u>			

You can navigate the exercise using the "**Previous**" or "**Next**" buttons at the top of each page or by clicking the section headers listed on the left.

	Introduction
Introduction	< PREVIOUS NEXT >
Overview	Please complete this exercise in accordance with your unit's annual review practices. You can save and return to the exercise as needed.
Supporting Materials	As you navigate through the sections, Elements will automatically surface the activities you have logged in Elements for the review year. If you have used the Area of Excellence label scheme to tag activities, you can use the "Area Related" lists in each section to surface these items in the area you would prefer.
Teaching Activities	Attachments can be attached through the "Supporting Materials" tab or on each section of the exercise.
Research & Creative Works	When you have completed your exercise with the necessary activities and attachments, use the "Submit" button to send your exercise on for review. Once you submit your exercise, you will no longer be able to edit your responses.
Service & Leadership	For questions about the review process for your unit, please contact your academic leadership.
	For questions about Elements @ IU, please contact the Elements Support Team at elements@iu.edu.

You can save, leave, and return to the exercise by using the toolbar available on the left side of the screen or by using the "Exit Exercise" button on the top left of the exercise page.

{//\}	John	
< EXIT EXERCISE		

Overview

The "**Overview**" section shows you a high-level overview of your entire exercise. You can review how many items and attachments have been saved in each section. By clicking on any section or sub-section of the exercise from the Overview page, you can navigate directly to that component of the exercise.

	Overview	
< PREVIOUS		NEXT >
	Test System Indiana University	
	Supporting Materials	
0	Overall attachments 0 overall attachments	>
Te	aching Activities	
Ø	Attachments 0 ottachments	>
2	Teaching Activities 2 items	>
	Teaching Related Scholarly & Creative Works 0 items	>
	Teaching Related Grants & Contracts 0 items	>
	Teaching Related Service & Leadership O items	>
E Re	search & Creative Works	
0	Attachments 0 ottochments	>
[GG]	Scholarly & Creative Works	

We recommend using the Overview section to track your progress and to confirm that you have entered and uploaded all your activities and attachments before submitting your review.

Supporting Materials

Supporting Materials	
REVIOUS	NEXT
Attachments	
Please use this space to upload supporting materials, such as a CV or personal narrative, for your Faculty Annual Review.	
For questions about the expected attachments for your unit, please contact your academic leadership.	
No attachments have been added for this review process. Add	
REVIOUS	NEX

The "**Supporting Materials**" section allows you to upload any general attachments to your exercise. By clicking the "+" button on the right-side of the section you can add an attachment, specifying a type and adding a description if you so choose.

Add an attachment	
Туре	
Annual Narrative	~
Choose a file *	
Annual Narrative.pdf	
Description	
This is my 2024 Annual Narrative.	
	CANCEL
	CANCEL SAVE

When specifying a type, the options are Annual Narrative, CV, Position Description, and Supplementary Information. Refer to your academic leadership's guidance regarding the attachment expectations for your unit.

Elements supports a variety of attachment types, however the system allows for seamless PDF viewing for reviewers.

Teaching Activities, Research & Creative Works, and Service & Leadership

The activities you have logged into Elements for the relevant calendar year will automatically be pulled into your Annual Review Exercise. Each activity will initially be listed in its original section: Teaching Activities in **"Teaching Activities**," Service & Leadership activities in **"Service & Leadership**," and Scholarly & Creative works and Grants & Contracts activities in **"Research & Creative Works**").

	Teaching Activities			
< PREVIO	us			NEXT >
	Attachments			
Plea	se use this space to upload supporting materials related to Teaching Activities.			
	1 attachment			F
	GEOL-F Syllabus 4242.pdf Uploaded on 07 Jan 2025 12:01 615 kB	0	⊻ 2	
1	Type Syllabus			
	Description This is my syllabus from my Spring 2024 section of GEOL-F 116.			
	Teaching Activities			
	3 items			
	10 v per page		1-3 (put of 3
	REMOVE ALL ORDER BY			
		VIEV	V ITEM DETA	NLS →
	FIRST YEAR SEMINAR - HOOSIERS ROCK!			÷
	COURSE TAUGHT Course title: FIRST YEAR SEMINAR - HOOSIERS ROCK! Course Subject & Class Number: GEOL-F 116 Number of Credit Hours: 4.00 Start date: 12.1aa 2024			
1	End date: 01 May 2024 Academic session: Spring Enrollment Total: 20 Instruction Mode: In-person Campus: Northwest	R	EMOVE	

Each section begins with a place for attachments, followed by the automatically surfaced list of Elements Activities. In Teaching Activities, you can designate a type for attachments you choose to upload; type options include Course Evaluations, Supplementary Information, and Syllabus. For the other sections, you can upload attachments and provide a description, but no types are available.

If you want to exclude an activity from your review, use the remove button to the right of the activity's description.

Activities Beyond Area

If you used the Area of Excellence Label Scheme to tag activities with an area differing from where it is automatically listed, you can pull those items into the section you prefer using the *"Area* Related..." sub-sections. Each activity can only be included on one list.

& Leadership activities that relate to the Teaching Area of Excellence.	
e: Teaching label, use the filter tools to select and populate the relevant activities.	
This list has no items Add	
	a Leodersing advinues that leade to the reaching area of Excemence. re: Teaching label, use the filter tools to select and populate the relevant activities.

For example, if you had completed a teaching-related service activity and wanted it considered as a part of your Teaching Activities during your review, you could navigate to the "**Teaching Related Service & Leadership**" list and select the "+." This will show you a list of your eligible Service & Leadership activities.

	0 items selected (0 or more required)	+ ADD NEW SERVICE & LEADERSHIP
10 v per pa	showing 1 - 1 out of 1 age sort by: Reporting date (new	vest first) 🗸
American S	tudies Individualized Major	Filters
	ADVISING Service Entity: American Studies Individualized Major Sub-Type: Academic Advising Position/Role: Core Academic Advisor Start date: 01 Jun 2022 End date: 01 Jun 2022 End date: 01 Jun 2024 Additional Information/ Explanation: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua Brief Description of Key Accomplishments: Advised 10 students seeking an individualized major in American Studies annually. Saw a growth in enrollment from 7 to 12 students seeking this individualized major plan.	Applied filters List Eligibility × Label × clear all filters List Eligibility © clear clear Eligible items only
SUMMARY	Ex-officio: False Reporting Dates: 01 Jun 2022 - 01 Jun 2024	Selected status
	2	Title
	Are you sure you wish to make this selection? This item will be removed from the following lists because they are configured to not allow items to overlap with this list: • Service & Leadership CANCEL	Type Non-research presentation Committee membership Leadership Event administration Editorial
		Label teaching

Using the filter tools on the right-side of the screen, search for the appropriate label – in this case "teaching." This will reduce the list of activities to only those items to which you have applied the Teaching label. Use the "**Add**" button to the right of the item description to move the activity from its initial spot on the Service & Leadership section to the Teaching Activities section. As items can only be included once per review, a pop-up will ask you to confirm that you would like to move the item.

Adding New Activities

You can add new activities into Elements via the Annual Review Exercises. These activities will reside on your full Elements profile just as activities entered from the Home page do.



Clicking the "+" button on any list will take you to a list of any entries for that activity category during the reporting period. In the upper right corner, there is an "+ Add New Activity" button.

Select items for Service & Leadership

< BACK TO LIST	1 item selected (0 or more required)	+ ADD NEW SERVICE & LEADERSHIP
10 v per page	showing 1 - 3 out of 3 sort by: Reporting date (newest first) 🗸	Filters
Add a new activity		
	*° C Select activity type	
Advising	Clinical Service Committee membership Community service	

Clicking "+ Add New..." will pop-up a menu of activities for that category. Once you select the activity type you need, you will arrive directly to the manual entry page for that activity type. Saving the activity adds it to the initial list and Elements will return you to the "Select items for..." screen.

Finalizing Your Review

Once you have attached all your attachments and ensured all your activities have been entered into Elements and added to your Annual Review exercise, you are ready to review and submit your exercise for review. If you forget to enter or attach something, you will need to work with your academic leadership to return your exercise to your level.

Once you submit your Annual Review, it will be locked for editing.

The Overview section will allow you to review your entire exercise on one screen; showing you the locations and counts of attachments and activities.



Selecting the **"Submit**" button in the upper right corner will trigger a summary pop-up, reminding you that your exercise locks after submission.

Summary
You are about to move this review process to Review.
You are now submitting this exercise for review. It will move to the next step in the review process and would need to be returned to you by an administrator in order for any changes to be made. Please ensure that you have fully completed your part of the exercise before submitting.
Please consider addressing the following issues:
Please consider addressing the following issues.
Supporting Materials
 Review process has no attachments
Teaching Activities
Appears complete

By hitting "**Confirm**" at the bottom of the summary pop-up, your exercise then moves to the Review stage and can no longer be edited. Your reviewer(s) can now see and begin reviewing your submission.

