FARES

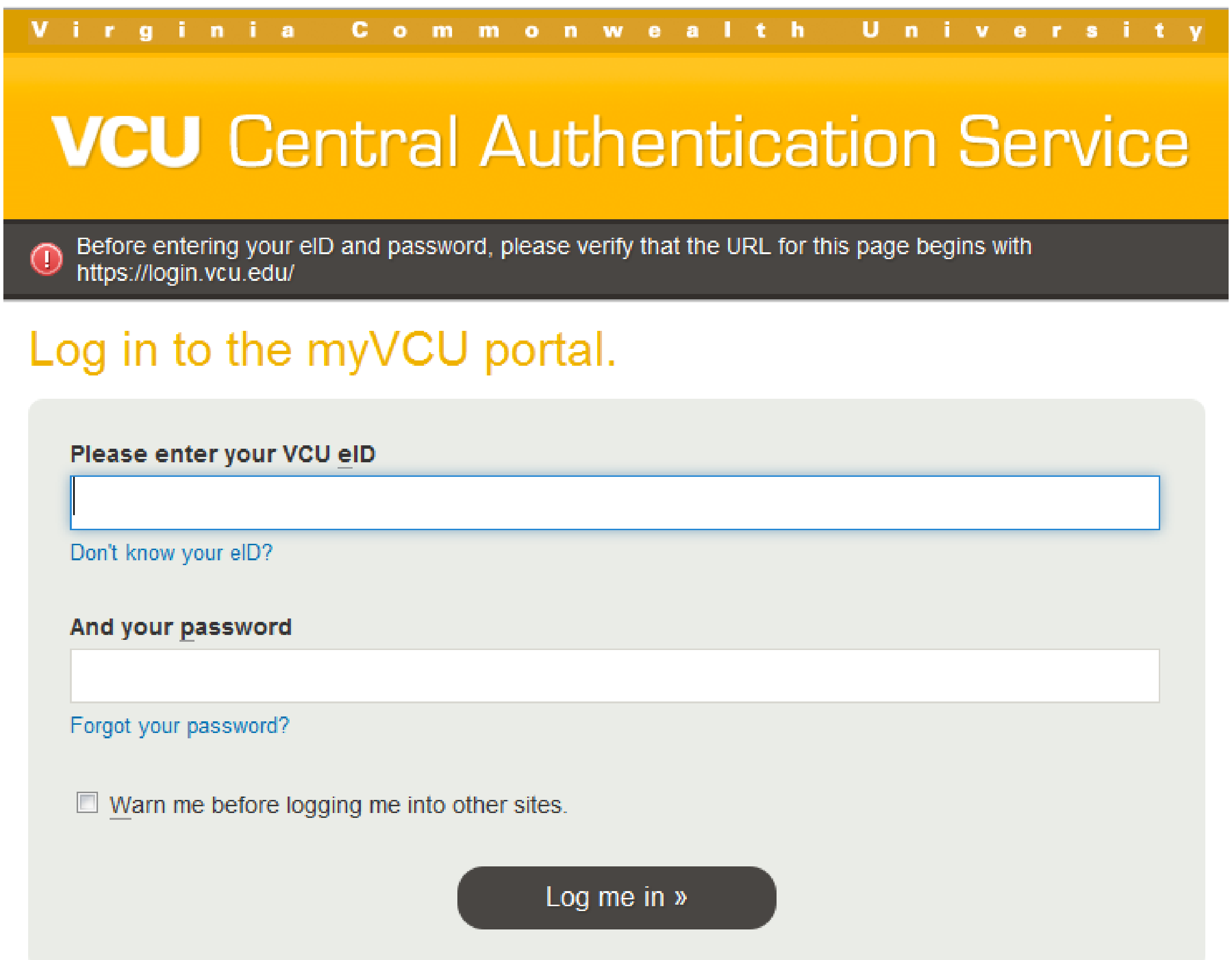
VCU School of Medicine

Faculty Activity Reporting & Evaluation System

Instructions for Department/Division Administrators

Getting Started

1. FARES can be accessed from myVCU Portal (http://my.vcu.edu) or directly from the following URL: [https://www.apps.som.vcu.edu/fares/.](https://www.apps.som.vcu.edu/fares/)
2. Before you can access the system, you will need to log in to VCU Central Authentication Service (CAS) using your VCU eID and password. [see screen capture below]
3. Enter your VCU eID and password and click **Log me in** to access FARES.
   [Call the VCU HelpDesk at 828-2227 if you have forgotten your eID password. You will need your VCUCard number to request a password reset.]



Browser Compatibility

The system is optimized for use with Mozilla Firefox 3.x. The latest version of Firefox can be downloaded for free from http://www.mozilla.com/en-US/. While the system can be used with other browsers including Safari, Internet Explorer (IE) 6.x and later, there may be minor page formatting issues due to rendering differences between different browsers.

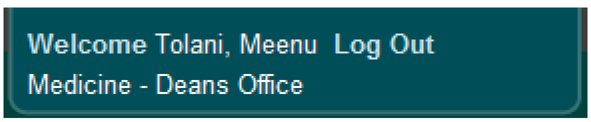
FARES Support

Department administration will be responsible for providing all necessary user support to the faulty in their department. The **Contact Us** feature in the system will now send emails directly to the department staff members listed in the system as "Department Administrator". Department staff can contact Office of Faculty Affairs (somofa@vcu.edu) if any help is needed to resolve issues listed below,

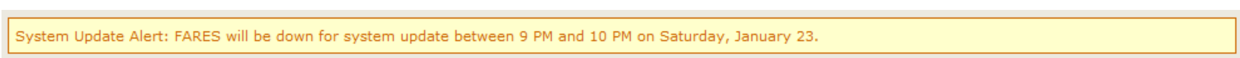
- Content, template, and deadline
- Technical and Data issues
- Comments and Feedback

FARES Home Screen

Your name, department and a link to logout of FARES will display in the top right corner of the screen. [see screen capture below]

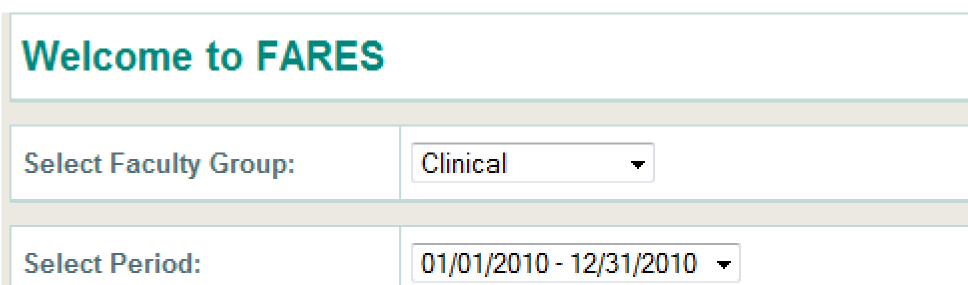


If there are any active alerts or announcements, a yellow **Message Bar** will appear at the top of the screen. Special notifications and alerts (such as scheduled system maintenance) will display in this message bar.



Welcome Message and Completion Status

Performance periods vary for Clinical and Teaching/Research faculty. Clinical Faculty are evaluated in the spring of each year for the previous *Calendar Year*. Teaching/Research and Administrative Faculty are evaluated in the summer/fall of each year for their performance in the last *Fiscal Year* (July-June).



Initially the system will display the Completion Status for Faculty Activity Report and Evaluations for your department and/or divisions for the current Reporting Period [see screen capture below]. To view the completion status for a different Reporting Period and/or Faculty Group, make the appropriate selections in the boxes provided. As you make different selections in the boxes, the Completion Status grid will update to show the status for the selected Faculty Group and Reporting Period [see screen capture below].

Completion Status by Organization

ACTIVITY REPORT	EVALUATION
Internal Medicine	
62.5% Not Started 37.5% In Progress 0.0% Completed, Not Submitted 0.0% Submitted	100.0% Waiting for Faculty Submission 0.0% Submitted by Faculty, Pending Division Chair Review 0.0% Submitted by Division Chair, Pending Chair Review 0.0% Evaluation Completed by Department Chair 0.0% Received by Faculty

To view the Completion Status by faculty name, click on the department or division link provided in the grid. By default the results are displayed alphabetically by faculty name [see screen capture below]. To sort by Activity Report status, click on the column header for Activity Report. Similarly, to view by Evaluation Completion Status, click on the Evaluation column header.

Completion Status by Submitter

Select Org: Internal Medicine - Cardiology | First | Previous | Next | Last

NAME	ACTIVITY REPORT	EVALUATION
Internal Medicine - Cardiology		
Faculty# 105	No Action 5/5/2010 4:35:13 PM	Waiting for Faculty Submission 5/5/2010 4:35:13 PM
Faculty# 11	No Action 5/5/2010 4:35:13 PM	Waiting for Faculty Submission 5/5/2010 4:35:13 PM
Faculty# 123	No Action 5/5/2010 4:35:13 PM	Waiting for Faculty Submission 5/5/2010 4:35:13 PM

Clicking on Faculty Name link will display the Approved Performance Evaluation and Plan for the selected faculty member. If the Evaluation has been completed and approved, then the completed Performance Evaluation and Plan details will be displayed. If the Evaluation is incomplete, the following message will appear:

Submitter has not yet released the report for review or review has not been completed.

Configuration Options

The configuration tools can be accessed by clicking on **Configuration** link on the navigation menu located at the top right [see screen capture below]. This link is only available to users who have been assigned to an administrator role (department administrator or Office of Faculty Affairs administrator) in FARES.

Home | Reports | **Configuration** | Contact Us

The list of available **Configuration Options** varies by role. By default, all department administrators have access to the following options:

Configuration Options

OPTION	DESCRIPTION
Activity Maintenance	Enter customized instructions by activity and update activity details
Set Deadlines	Set departmental deadlines for activity report and performance plan submissions
User Dataload Maintenance	Unlock user's dataload status.
User Maintenance	Assign/edit user roles to users
User Section Maintenance	Set user's access to activity sections.

Activity Maintenance

For each question on the Activity Report, the Office of Faculty Affairs (OFA) has included detailed instructions to provide guidance on accurately answering the question. However, in some cases departments may wish to customize the instructions to further clarify how the data should be reported. The customized instructions entered by department administrator are appended to OFA instructions on the Activity Report.

[NOTE: Customized instructions are automatically rolled over from the previous Reporting Period.]

Activity Maintenance

Activity Period:	January 1, 2010 – December 31, 2010
Select Department:	Internal Medicine
Select Section:	Clinical
Select Activity:	Time spent on Clinical Activities

Select the Section and Activity for which you wish to enter custom instructions. Enter department-specific instructions in the box provided. Click on Save. A preview of the combined instructions will appear in the section labeled **Combined Instructions**.

[NOTE: While department administrators can customize instructions for most activities, in rare cases, OFA may have blocked this access for an activity because of specific reporting requirements from VCU and SOM.]

Set Deadlines

The department administration is responsible for setting internal deadlines for completing the Activity Report and Performance Evaluations.

Submission Due Date For Submitters: (mm/dd/yyyy)	02/05/2011
Evaluation Due Date For Evaluators: (mm/dd/yyyy)	02/18/2011
Review Due Date For Reviewers: (mm/dd/yyyy)	03/04/2011

Separate deadlines can be set for Faculty Submitters, Evaluators, and Reviewers in order to meet the Dean's Office deadline for completing the Annual Faculty Evaluation process. Initially all three dates are set to the Dean's Office deadline.

To change the due date, enter a new date in the box provided or select a new date by clicking on the calendar icon that appears to the right of each textbox.

Faculty members who have not yet completed their Activity Report will see the following Alert message on the Activity Report screens after the Submission Due Date has passed. They will still be able to access and complete their report.

The deadline for submitting your Activity Report, and Self Evaluation has passed. The due date was: 1/26/2011 12:00:00 AM

A similar message will be displayed for Evaluators and Reviewers after their respective deadlines have passed.

User Dataload Maintenance

To facilitate the completion of Activity Report, faculty members have the option to load data from previous reporting period. This feature is available for activities where data does not change much from year to year. A department administrator can view the list of activities for which this feature is enabled by using the User Dataload Maintenance Configuration Option [see screen capture below]. To do this, select any User from the dropdown list and Section of the Activity Report. This will return a list of Activities for which the **Load Data from Previous Cycle** feature is enabled.

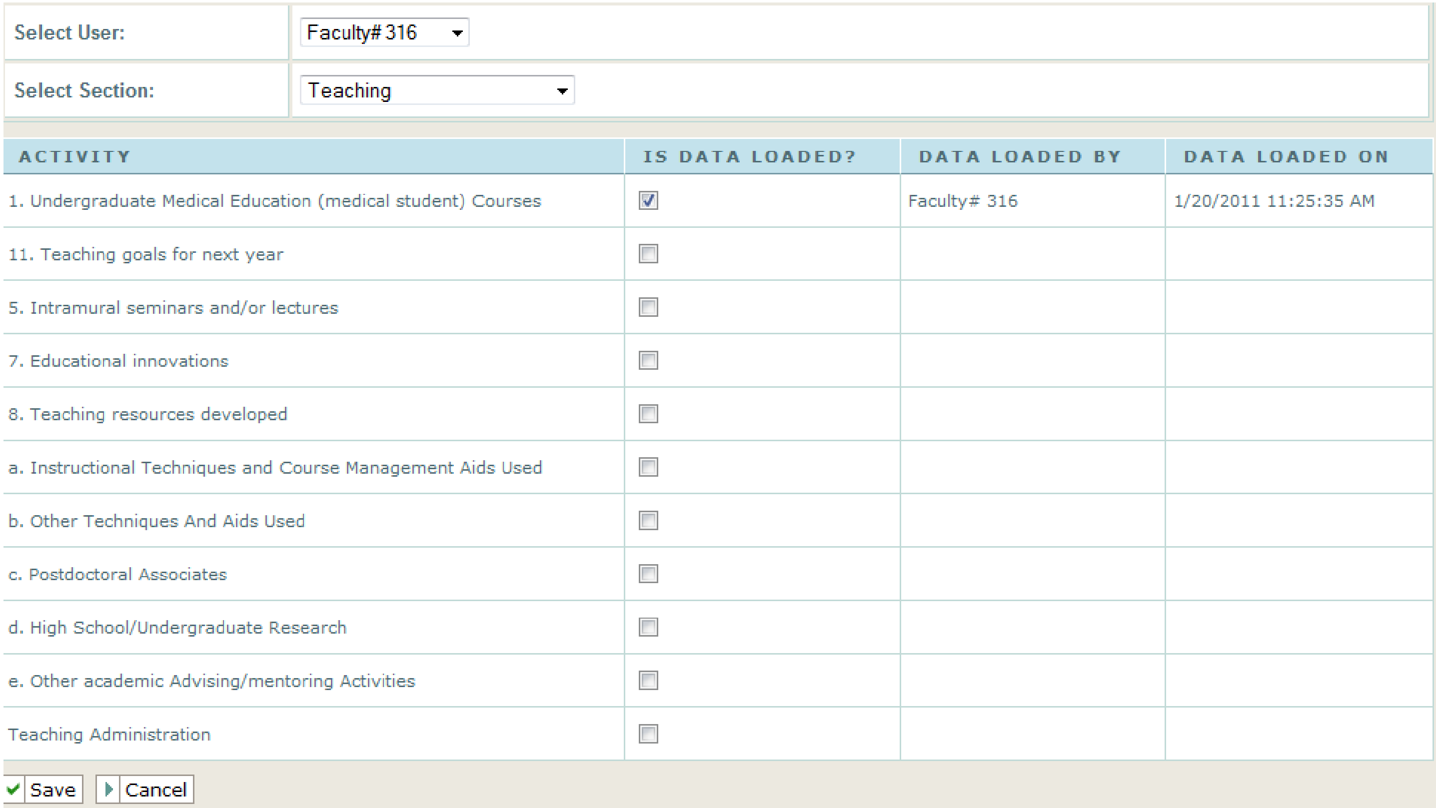
By default, the **Load Data from Previous Cycle** feature can only be used once by a faculty member for a given activity. Once the data is loaded from previous cycle for a particular activity, the link is replaced with this message:

The data was loaded from previous cycle on 1/20/2011 11:25:35 AM

Previous Cycle Dataload Maintenance

Select Period:	01/01/2010 - 12/31/2010
Select User:	[Select User]
Select Section:	Administration

In situations where a faculty member has loaded data from previous cycle but then inadvertently deleted or modified it and would like to restore data from last year, you can reset the **Load Data from Previous Cycle** link for them using this tool. To do this, select the Faculty Member name and the Section for which the Data load option needs to be reset. This will return a grid similar to the example shown below. In this case, the faculty member has loaded data from previous cycle for Activity **"1. Undergraduate Medical Education (medical student) Courses"**. To reset the data load status, clear the checkbox "**Is Data Loaded?"**, and then click the Save button available below the grid.



Select User: Faculty# 316

Select Section: Teaching

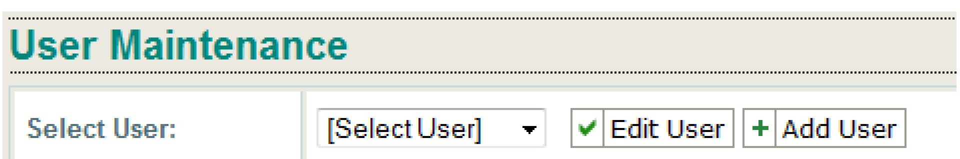
ACTIVITY	IS DATA LOADED?	DATA LOADED BY	DATA LOADED ON
1. Undergraduate Medical Education (medical student) Courses	☑	Faculty# 316	1/20/2011 11:25:35 AM
11. Teaching goals for next year	☐		
5. Intramural seminars and/or lectures	☐		
7. Educational innovations	☐		
8. Teaching resources developed	☐		
a. Instructional Techniques and Course Management Aids Used	☐		
b. Other Techniques And Aids Used	☐		
c. Postdoctoral Associates	☐		
d. High School/Undergraduate Research	☐		
e. Other academic Advising/mentoring Activities	☐		
Teaching Administration	☐		

Save Cancel

User Maintenance

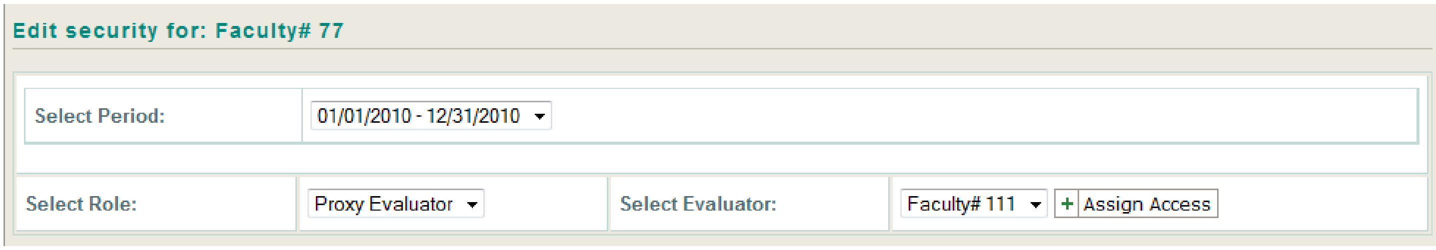
This **Configuration Option** can be used to assign users to one or more of the following roles in FARES:

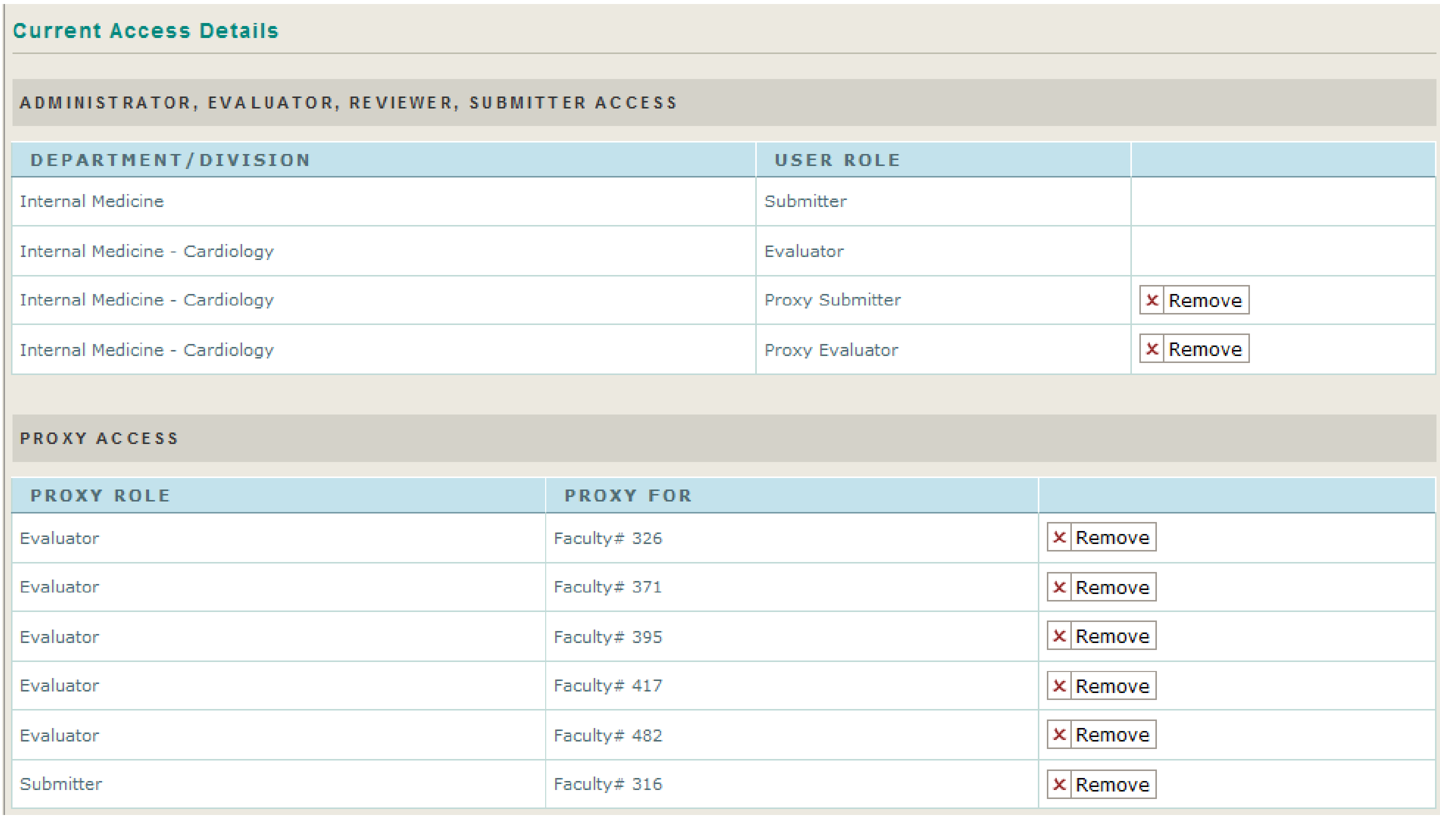
- Submitter (Faculty)
- Evaluator
- Reviewer
- Administrator
- Proxy Submitter
- Proxy Evaluator
- Proxy Reviewer



Editing User Access

To add or remove an existing user from a role, first select their name from the User dropdown list. This will open up two new sections on the page: **Edit Security** and **Current Access Details** [see screen capture below]. It is recommended that you review the user's current access details first before assigning to a new role.





In the Current Access Details section, the top grid lists all the roles to which the selected user is currently assigned. The second grid lists the details of the assigned Proxy roles. If a user is not assigned to any Proxy roles, the second grid will be empty. To remove a user from a Proxy Role or to selectively remove Proxy Access, use the corresponding **Remove** button in the grid. When a Proxy Role is removed from the top grid, all Proxy records associated with that Role are also removed.

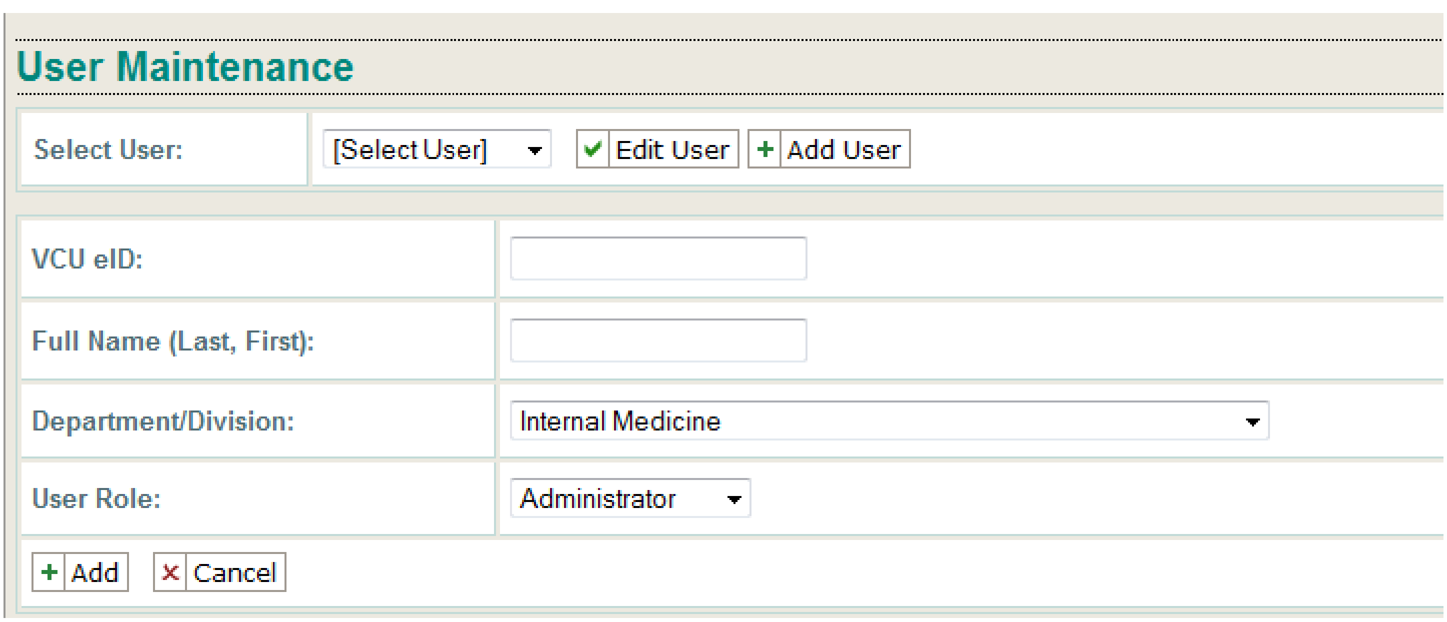
In the Edit Security section, **Submitter** is the default Role selection. To change to a different role, click on the Select Role dropdown. Depending on the Role selected, the dropdown box located next to it will change to match the Role. Refer to the table below for explanation of various Roles. Click on **Assign Access** button to add user to the selected Role.

Role	**Information needed to add a user to this Role**	**Role Description**
Submitter	Department/Division Name	All faculty members required to submit the Annual Activity Report and Performance Plan must be assigned to this role. The Department/Division name associated with Submitter role is used to appropriately route the completed forms to Evaluator and Reviewer (if applicable) for that area.
Evaluator	Department/Division Name	Department/Division Chairs or Faculty Supervisors who will be responsible for completing Performance

		Evaluations for faculty must be added to this role. The Department/Division name is used to match the Evaluator with Faculty Submitters.
Reviewer	Department/Division Name	Department Chairs responsible for reviewing Performance Evaluations completed by Division Chairs must be added to this role. This role is only applicable to departments that have divisions and, therefore two levels of approval for Faculty Evaluations and Performance Plans.
Administrator	Department/Division Name	Administrators can monitor completion status, set internal deadlines, manage users, run reports, and access other functions described in this document for the selected Department/Division(s).
Proxy Submitter	Submitter Name	Individuals who will be completing Activity Report and Performance Plan on behalf of a Faculty Submitter must be added to this role. Select the Faculty Member name from the dropdown to assign permissions.
Proxy Evaluator	Evaluator Name	Individuals who will be evaluating faculty members on behalf of an Evaluator must be added to this role. Select the Evaluator name from the dropdown to grant access to Faculty Activity Reports assigned to that Evaluator.
Proxy Reviewer	Reviewer Name	Individuals who will be reviewing completed faculty Evaluations and Performance Plans on behalf of the Department Chair or a Reviewer must be added to this role. Select the Reviewer name from the dropdown to grant access to completed Activity Reports and Approved Performance Plans and Evaluations assigned to that Reviewer.

Adding User

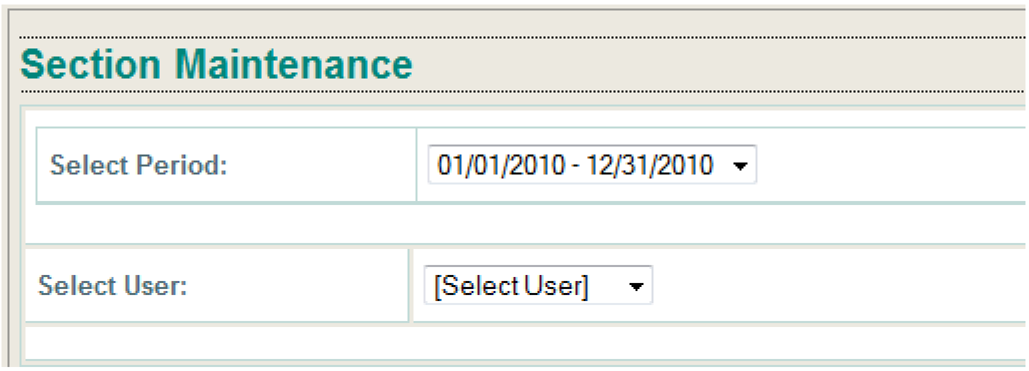
To add a new user to FARES, click on **Add User** button [see screen capture below]. Complete the information in the boxes provided. Click on **Add** button when done. This will add the user to the selected Role.



Keep in mind that users added to Proxy roles using this method will not have access to any records until you specifically assign them access to specific Submitter, Evaluator, and/or Reviewer using the steps described above in the section titled **Editing User Access**.

User Section Maintenance

This **Configuration Option** can be used to enable or disable sections of the Activity Report for a faculty member [see screen capture below]. First, select a user from the dropdown list. This will display a grid listing all available Activity Report Sections and a checkbox for whether or not they are applicable for the selected user.



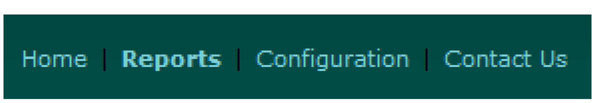
To hide a Section, clear the checkbox located to its right and click the Save button located below the grid. Similarly, to unhide or enable a Section, check the appropriate box and click on Save.

SECTION	IS APPLICABLE?
Appointment Information	☑
Teaching	☑
Research	☑
Clinical	☑
Service	☑
Administration	☑
Professional Development	☑
Honors	☑

Save | Cancel

Reports

Department administrators have access to several reports in FARES. The Reports option is located at the top menu bar on each screen [see screen capture below]



The Reports page includes a list of report titles and a brief description for each [see screen capture below]. Clicking on a Report Title will open a second page which allows the user to select report parameters. For example, the **Activity**

Report Status report requires these parameters: Reporting Period, Organization, and Sub-Organization (if applicable). The list of Organizations and Sub-Organizations displayed on the parameters selection page is determined by the level of access granted to you.

After selecting the parameters from dropdown lists, click on View Report button to run the report.

Reports

OPTION	DESCRIPTION
Activity Report	Print faculty activity report
Performance Plan Report	Print faculty performance plan report
Activity Report Status	Activity Report status
Actual and Projected Effort Report	Faculty's actual effort for the period selected and projected effort for the following period.
Actual Effort Report	Faculty's actual effort
Projected Effort Report	Faculty's projected effort (entered in selected period) for the following period.
Non-SOM Course Report	Non-SOM Course Report
SOM Course Report	SOM Course Report
UME Course Report	UME Course Report
Proxies List	Proxy Submitters, Evaluators, and Reviewers Detail Report.
FARES Users	Faculty user details including assigned evaluator and reviewer.
Evaluations	Lists evaluation scores for faculty
IRD and CP2 Form Status	Faculty who have not submitted either IRD or CP2 Forms for Fiscal Year

Initially the report will be rendered on the screen. With the exception of Activity Report and Performance Plan Report, all other reports can be exported to PDF, Word, or Excel.

To print the Activity Report and Performance Plan Report, use the Print function in your browser. Please note that only complete Activity Reports and Performance Evaluations can be printed. The system will generate a message

For all other reports, click on the Disk icon (last icon on the right in the screen capture below) on the Reports Viewer toolbar, and select PDF to generate a printer-friendly version of the report. Use the Print function of Adobe Reader to send the report to printer.