

This guide outlines the primary tasks a reviewer might complete within the Elements Faculty Reporting Tool – Stage 2 Review. Additional resources and documentation regarding Optimizing the Elements Profile, Claiming and Rejecting Items, and more can be found on the Faculty Affairs Elements Training page located at [Faculty Resources>Purdue Elements>Training Resources and QRGs](#). Please contact your [Purdue Elements College Success Managers](#) for further assistance and guidance.

## Contents

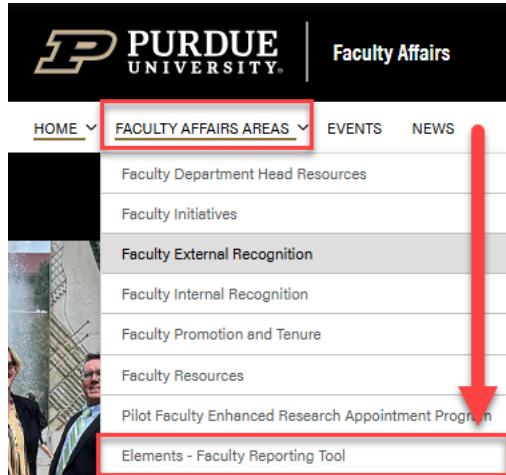
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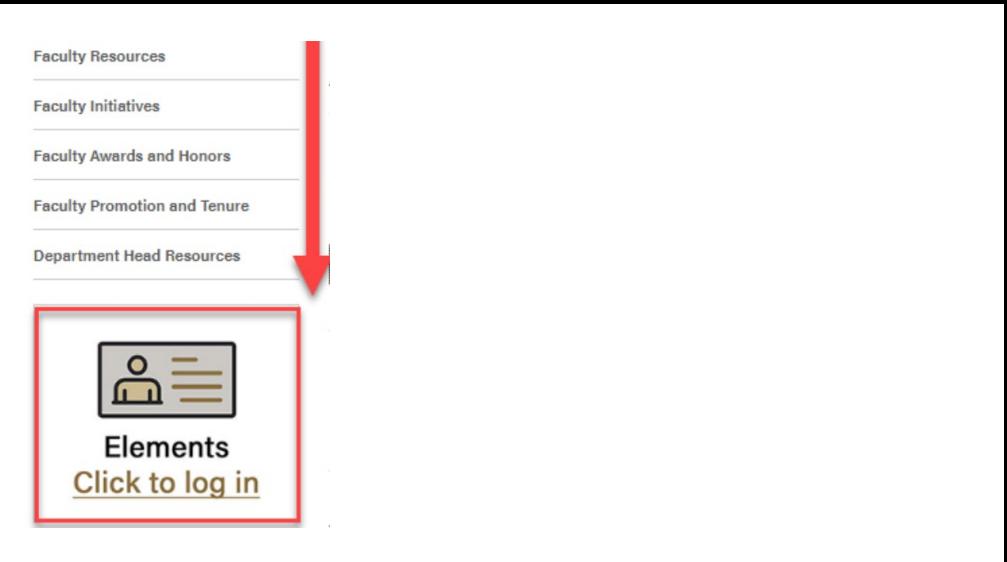
### Accessing Elements Faculty Reporting Tool

To access the Elements platform, navigate to the Faculty Affairs website and **click the 'Faculty Affairs Areas' tab**.

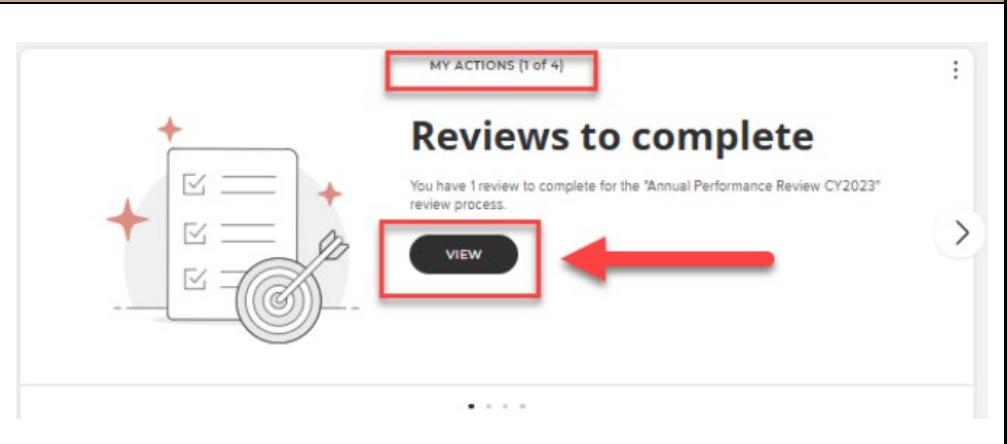


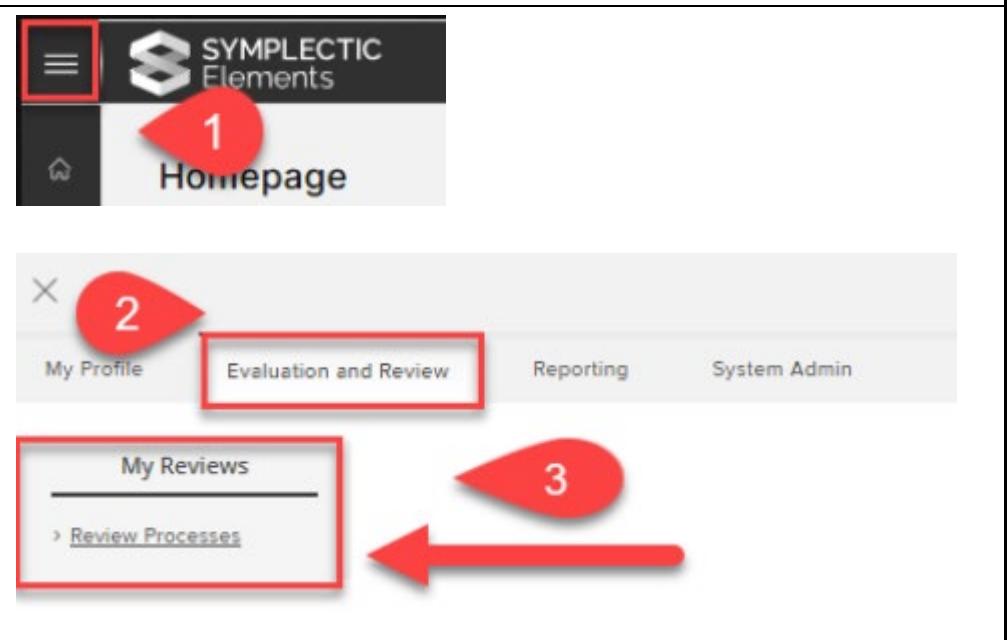
Select the '**Elements - Faculty Reporting Tool**' from the drop-down menu.

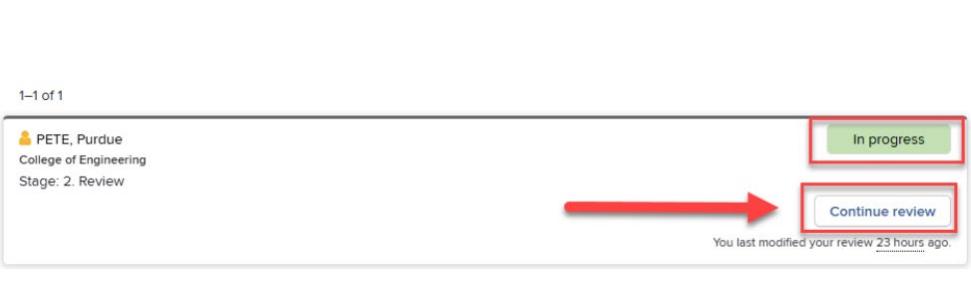
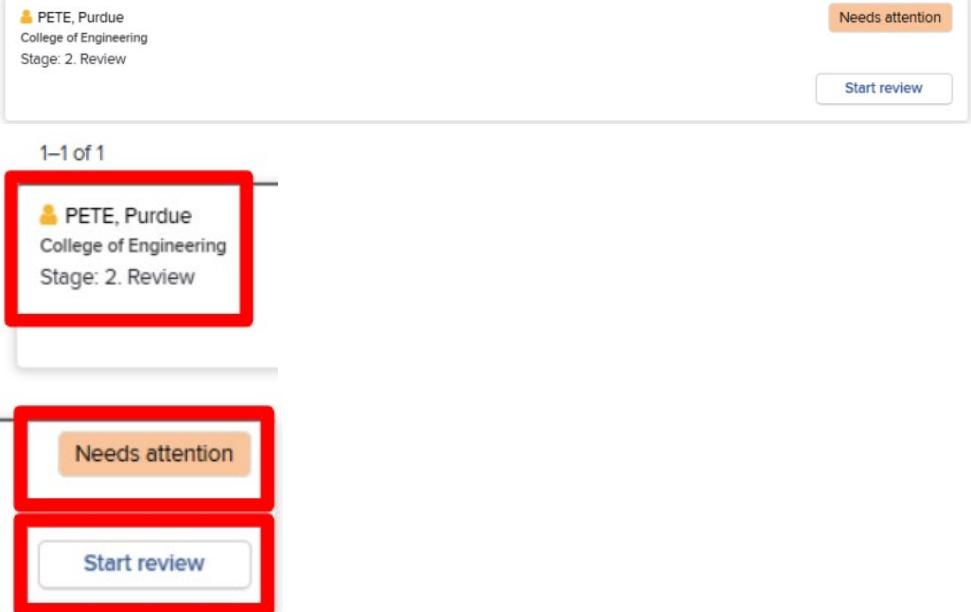
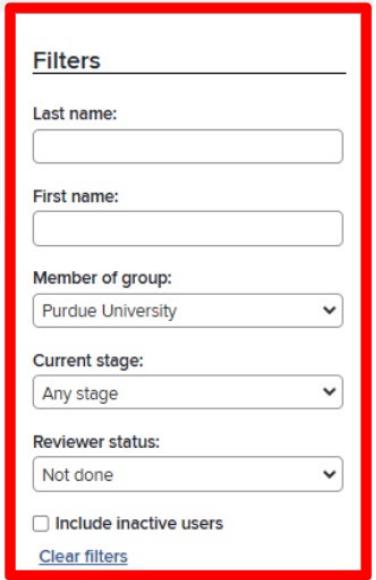


<p>Scroll to the Elements icon and <b>click to open</b> the tool.</p>	
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### Accessing Stage 2: Review

<p><b>Click 'VIEW'</b> to open the <b>Annual Performance Review</b> exercise and the Annual Performance Review Cycle page will display.</p>	
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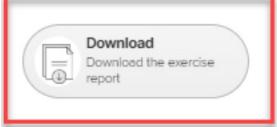
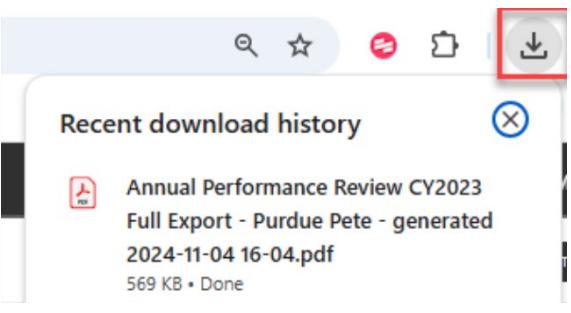
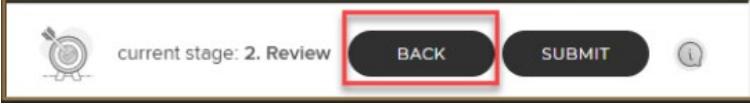
<p>An alternative is to click the three lines located at the top left of the screen.</p> <p>Then navigate to the <b>'Evaluation and Review'</b> tab.</p> <p>Navigate to <b>'My Reviews'</b> and click <b>'Review Processes'</b>.</p>	
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<p>While it is recommended to complete the review in one sitting, you may save your work and return later.</p> <p>When you return, it will state that your review is <b>'In progress'</b> and you will <b>Click Continue Review</b>.</p>	
<h3>Faculty Record Access</h3>	
<p>The 'Reviews for Annual Performance Review' screen allows you to select the faculty member you have been assigned to review.</p> <p>The faculty name is listed on the <b>left side</b> of the screen.</p> <p>On the <b>right side</b>, it states, '<b>Needs attention</b>'.</p> <p><b>Click 'Start review'</b> to open the record and begin the review process.</p>	
<p>You may utilize <b>Filters</b> located on the far right to search for a missing record.</p> <p><b>Input the last name and first name</b> of the faculty member and their record should display.</p> <p>If the record does not display, contact your College Success Manager for assistance.</p>	

**Elements Section Navigation**

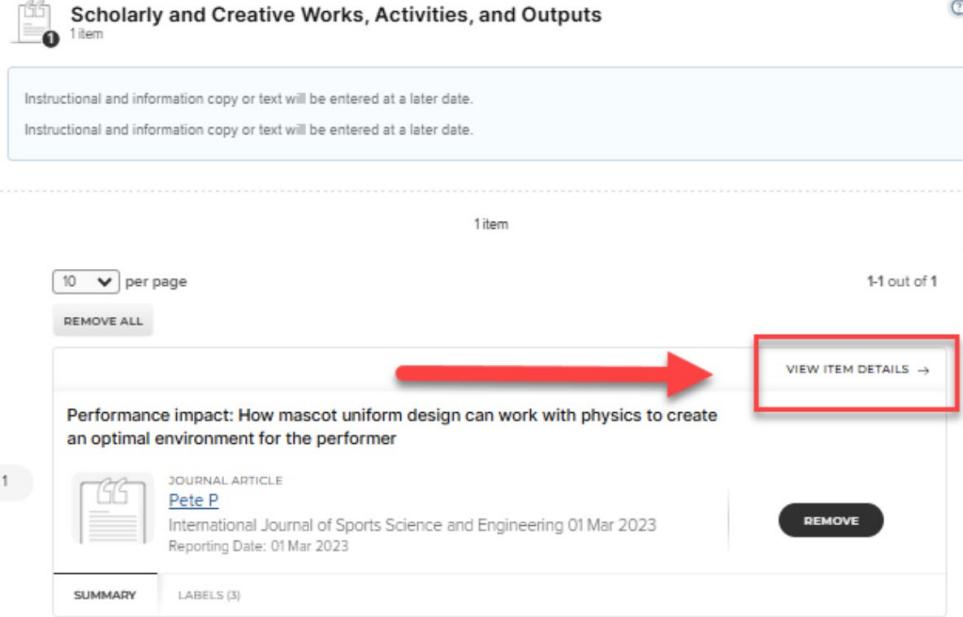
<p>To view a section from the <b>Elements homepage</b>, use the left-hand menu and <b>click the title of the section</b> you wish to view.</p>	<p>Introduction Overview   <b>Scholarly &amp; Creative Works, Activities, and Outputs</b>  <b>Learning &amp; Teaching Activities and Outputs</b>  <b>Grants, Funding, and Expenditures</b>  <b>Service &amp; Engagement Activities and Outputs</b>  <b>Honors, Awards, and Recognitions</b>  <b>Reflection &amp; Moving Forward</b>  <b>Extension &amp; Impact</b>  <b>Nominate Colleague</b>  <b>Personnel Information</b>  <b>Attach CV</b> </p>
<p>You may also utilize the '<b>PREVIOUS</b>' or '<b>NEXT</b>' buttons located at the top or bottom of the page to navigate sections.</p>	<p style="text-align: center;">   <b>Scholarly &amp; Creative Works, Activities, and Outputs</b>  </p>
<p>Use the '<b>SAVE</b>' feature to save your work while in progress.</p>	<p style="text-align: center;">  </p>
<p>Please <b>DO NOT HIT 'SUBMIT'</b> until you are ready to fully submit the exercise back to the faculty member for a response.</p> <p>Submit pushes the exercise into Stage 3: Respond.</p>	<p style="text-align: center;">  </p>

**Download Data**

<p>If you would like to download a PDF of the annual performance review, navigate to the menu located on the left-hand side of the screen and scroll to the bottom of the list.</p> <p><b>Click the 'Download' button and the export window will display.</b></p>	<p>Introduction Overview  Scholarly &amp; Creative Works, Activities, and Outputs  Learning &amp; Teaching Activities and Outputs  Grants, Funding, and Expenditures  Service &amp; Engagement Activities and Outputs  Honors, Awards, and Recognitions  Reflection &amp; Moving Forward  Extension &amp; Impact  Nominate Colleague  Personnel Information</p> 
<p>Select 'PDF' and then click 'DOWNLOAD'. The system will respond with a 'rendering' notification.</p>	
<p>Once the download is complete, a pop up notifying you that it is ready to download will appear on the upper right-hand corner of your screen.</p>	
<b>Send Back a Review</b>	
<p>To send a review back to Stage 1, click the 'BACK' button at the top right of the screen.</p>	

<p>A summary page for Stage 2 appears. <b>Click the acknowledgement check box.</b></p>	<p>Summary</p> <p>You are about to move this review process to 1. Record.</p> <p>Please click the "Confirm" button to push this back to the Record Stage, where a faculty member can edit the exercise again before sending it back to this stage, Review.</p> <p>Please check the following box to proceed:</p> <p><input type="checkbox"/> I acknowledge that this will move the exercise back to the Record Stage.</p> <p></p> <p> Scholarly &amp; Creative Works, Activities, and Outputs</p> <p> Section needs review</p> <p> Learning &amp; Teaching Activities and Outputs</p>
<p>Scroll to the bottom of the page and <b>click 'CONFIRM'.</b></p>	<p> CANCEL  CONFIRM</p>
<p>A message will appear at the top of the page confirming the Review has moved back to Stage 1: Record.</p>	<p>09:31 Purdue Pete's Review process moved to '1. Record'. </p>
<h3>Segment Navigation: Activities &amp; Outputs</h3>	
<p>Once you have accessed a section of the record, navigate to the item you want to review, <b>click on the title</b>, and scroll down to the '<b>Activities and Outputs</b>' segment.</p>	<p><b>COPY FOR TRAINING - Annual Performance Review CY2023</b></p> <p> EXIT EXERCISE</p> <p> PREVIOUS </p> <p> Scholarly + Creative Works, Activities, and Outputs</p> <p>Introduction</p> <p>Overview</p> <p>Personnel Information</p> <p><b>Scholarly + Creative Works, Activities, and Outputs</b> </p> <p>Learning + Teaching Activities and Outputs</p> <p>Grants, Funding, and Expenditures</p> <p>Service + Engagement Activities and Outputs</p> <p>Extension + Impact</p> <p>Honors, Awards, and Recognitions</p> <p>Reflection + Moving Forward</p> <p> Narrative, Future plans + support needed, and Works in progress</p> <p>No narrative, future plans + support needed, and works in progress fields have been added for this section. <a href="#">Add...</a></p> <p> Attachments</p> <p>Please see specific instructions from your college, school, department, primary committee, or similar for what attachment, if any, is expected here and the format of it.</p> <p>No attachments have been added for this section. <a href="#">Add...</a></p> <p> Scholarly and Creative Works, Activities, and Outputs </p> <p>1 item</p>

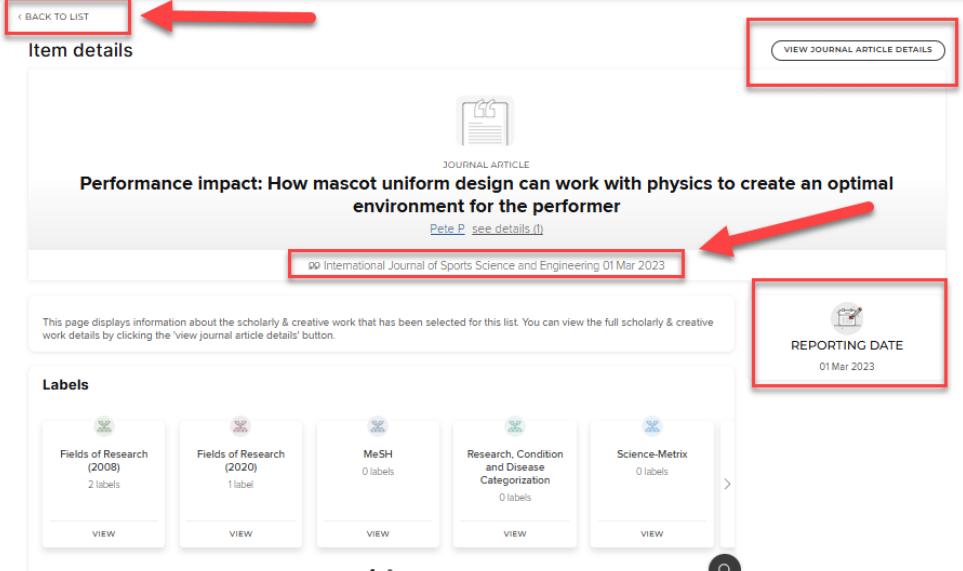
Scroll to the first item listed and click 'VIEW ITEM DETAILS' to open the record.



When you are ready to review the next item click 'BACK TO LIST' located in the upper left-hand corner of the screen.

Click into other records in the list to access them.

If there are missing items for the calendar year, please check that the information and dates in your Elements homepage profile are accurate and revise as needed.



### Segment Navigation: Narrative & Future Plans

To view the '**Narrative, Future plans & support needed, and Works in progress**' segment, scroll to the top of the page.

There are no character limits for these text boxes, and no formatting capability.



#### Narrative, Future plans & support needed, and Works in progress

4 narrative, future plans & support needed, and works in progress fields

##### Narrative

This year has been a great year for growth and learning new ways to communicate non-verbally.

##### Plans for the Future and Support Needed

I will continue to find new ways to engage the fans to keep them excited for our team and the game.

##### Other

I enjoy the students' engagement in the game.

##### Works in Progress

Next year I have been invited to join other mascots in the first annual walk like a mascot convention. It is sure to be an event like no other.

### Segment Navigation: Attachment Segment

Scroll to the '**Attachments**' segment and then click the '**download arrow**' to download a copy to view in Adobe Acrobat.

You will notice that different file types may be attached (e.g., Word, Excel, PDF) and are available for review.



#### Attachments

Please see specific instructions from your college, school, department, primary committee, or similar for what attachment, if any, is expected here and the format of it.

1 attachment

1 Event Schedule Sample.docx  
Uploaded on 02 Dec 2024 16:20 | 15 kB

Description  
Agenda for Walk Like a Mascot Convention



Download this attachment

### Review Segment

Scroll to the '**Review**' segment, navigate to the open text box, and provide your comments.

You will **click 'SAVE'** to store the information.



YOUR REVIEW (0)

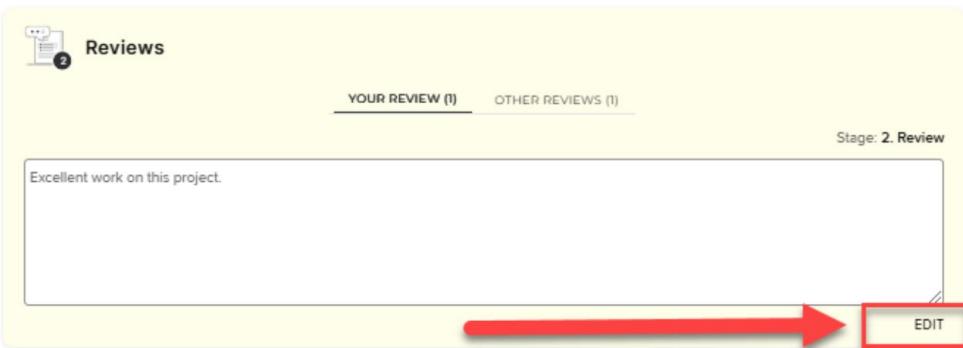
OTHER REVIEWS (1)

Stage: 2. Review

Excellent work on this project.

Input Feedback and then "Click Save"

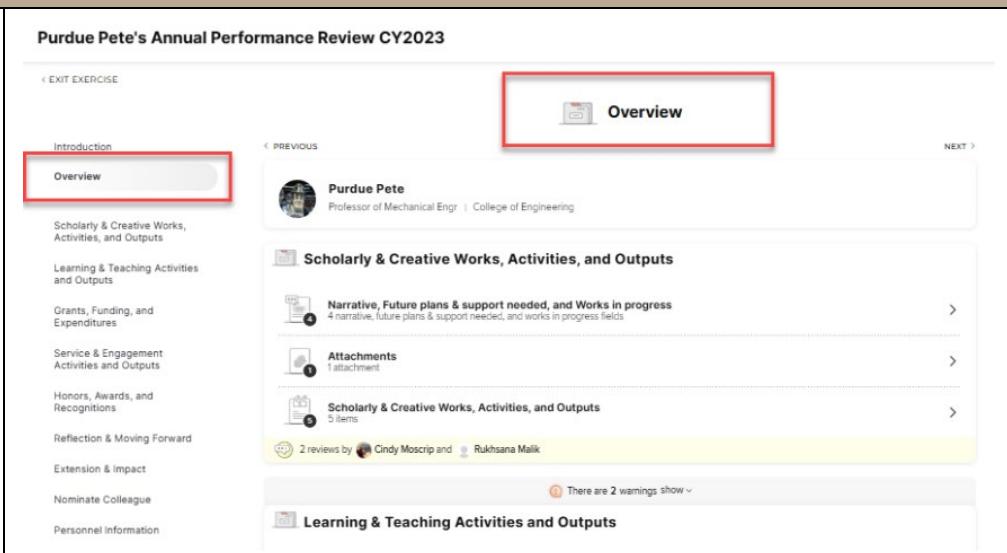
SAVE

<p>You may also return to a review box and <b>click 'EDIT'</b> to make additions or corrections and then click <b>'SAVE'</b> if you do this prior to pressing <b>'SUBMIT'</b>.</p>	
<h3>Multiple Reviewers</h3> <p>When there are multiple reviewers, to see if comments have been left by another reviewer, navigate to the review box. If a review has been written, the <b>'OTHER REVIEWS'</b> tab will display.</p> <p><b>Click 'OTHER REVIEWS'</b> to view the comments left and identify the reviewer.</p> <p>If multiple reviewers are in the same faculty's annual performance review record, you may experience a lag as to when comments from other reviewers become visible.</p>	
<p>You may <b>toggle</b> back and forth between your review and the comments left by other reviewers. This feature provides you with the ability to calibrate your review with the feedback provided by other reviewers.</p>	
<h3>Optional Sections</h3> <p>There are several sections later in the Elements system that are not used by all departments/schools. All faculty are asked to <b>attach a recent copy of their CV in the 'Attach CV' section</b>. Please refer to your Department/School Head for guidance on what was asked of faculty and expectations for reviewing these sections.</p>	<p>The <b>'Reflection &amp; Moving Forward Section'</b> allows faculty to briefly summarize and evaluate the degree to which they achieved their goals during the last calendar year. Faculty may share how they plan to sustain or improve performance in this area during the next calendar year. They may also articulate what support, resources, or changes would facilitate sustained or improved performance in this area.</p>

The ‘**Extension and Impact**’ section will only be completed by faculty that had activity within Purdue Extension. Reviewers within Extension will follow the process we articulated for the previous sections. If the faculty member under review did not perform any extension activities, then this section may be left completely blank.

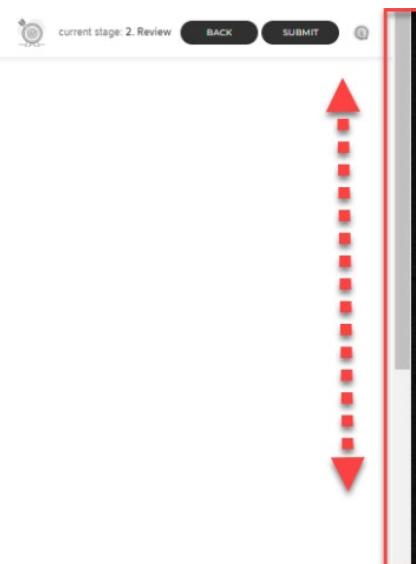
The ‘**Nominate Colleague**’ and ‘**Personnel**’ sections do not have any segments to review in Stage 2, and therefore there is no option for reviewers to leave any feedback.

## Overview Navigation

<p>Click ‘<b>Overview</b>’ located on the menu on the left-hand side of the screen.</p>	
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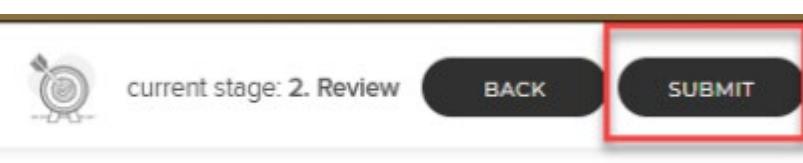
Use the scroll bar located on the right-hand side of your screen to navigate down to view all sections that were required to be reviewed.

You may use this feature to ensure the accuracy of your review process.



## Submit

To finalize a review and move the record to Stage 3, navigate to the top right-hand side of the Elements screen and click ‘**SUBMIT**’.



<b>Check the acknowledgement box</b> stating that you understand that you will not be able to edit or provide more written feedback.	
Scroll to the bottom of the summary and <b>click 'CONFIRM'</b> .	
The status will change, and a message will appear at the top of the screen stating that the process moved to Stage 3: Respond.	