

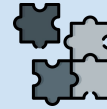
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[GO.VCU.EDU/SOMPORTFOLIOHELP](https://go.vcu.edu/somportfoliohelp)

6 STEPS

TO COMPLETE YOUR
SELF-EVALUATION
IN PORTFOLIO



ADD ACTIVITIES



ATTACH REPORT



SET EXPECTATIONS



CREATE GOALS



**ADJUST
DISTRIBUTION**



SUBMIT

2024 EVALUATION TIMELINE

APR

MAY

JUN

JUL

AUG

Review activities from last year. If they are ending, update the activity with an end date. If they continue, no end date is necessary.

Complete self-evaluation



Self
evaluation
Due 6/30



Supervisor
evaluation
Due 7/31



Chair
evaluation
Due 8/31



ADD ACTIVITIES

ADD YOUR ACTIVITIES FROM 7/01/2023 THROUGH 6/30/2024

1. Select Activities

- Select an activity tile for work completed during the academic year.

Example

2. Select Publications

3. Select the + Add button

- Add the publication activity information (dates, role, publisher, etc.)
- Review and add activities to relevant activity tiles.

4. Select Profile

5. Select Activity Report

6. Name your report and select Save to Documents

Need more help?
See this [guide](#).



The screenshot shows the VCU Portfolio website interface. The main dashboard displays various activity categories with counts: EDUCATION (3), CERTIFICATION & LICENSURE (0), HONORS & AWARDS (0), MEMBERSHIPS (0), PRESENTATIONS (0), TEACHING (1), SERVICE (0), PUBLICATIONS (3), and PROFESSIONAL DEVELOPMENT (0). A red arrow points to the 'PUBLICATIONS' tile, which is labeled with a yellow box containing the number '2'. A second screenshot shows the 'Publications' import page with a red arrow pointing to the '+ Add' button, labeled with a yellow box containing the number '3'. A third screenshot shows the 'Profile' page with a red arrow pointing to the 'Activity Report' tab, labeled with a yellow box containing the number '5'. A fourth screenshot shows the 'Activity Report' dialog box with a red arrow pointing to the 'Save to Documents' button, labeled with a yellow box containing the number '6'. A yellow box with the number '4' is also present on the 'Profile' page, pointing to the 'Profile' link in the sidebar. A yellow box with the number '1' is on the 'Activities' link in the sidebar. A yellow box with the number '3' is on the 'Add' button in the 'Publications' import page.



ATTACH REPORT

Your self-evaluation must have an Activity Report attached. The Activity Report highlights all the work you've done over the past evaluation period. Your supervisor and chair will have access to this document.

1. Select **Performance** then **Evaluation**.
2. Below the Subject header, Select **pencil icon** to Edit.
3. Select the **link** button to Attach your Activity Report.
4. The Activity Report is now attached and ready for your supervisor to review.

Performance >

- Evaluation **1**
- Expectations
- Goals
- Performance Improvement Plan
- Work Distribution

Attach an Activity Report

Choose from your available Activity Reports below. To create a new option, use your Profile to generate an Activity Report and save it to the Documents section.

Show 10 entries Search:

Name (click filename to open)	Upload Date	
Activity Report.pdf	02/28/2023 02:29 PM	
SECOND Activity Report.pdf	02/28/2023 02:29 PM	

Showing 1 to 2 of 2 entries Previous 1 Next

3 Close

Subject Henderson, Katherine

Evaluation Status: Self-evaluation in progress
 Supervisor: Aamer Syed
 Department Chair: System Administrator

2

Subject Henderson, Katherine

Evaluation Status: Self-evaluation in progress
 Supervisor: Aamer Syed
 Department Chair: System Administrator

[Activity Report.pdf](#) 2/28/2023 9:06:46 PM

4

Need more help?
See this [guide](#) or [video](#).





SET EXPECTATIONS

Faculty and their supervisors have the ability to actively participate in setting up expectations for the faculty member throughout the year. Each section of the evaluation can have expectations associated with them. Expectations can be school level, department level, or faculty level.

1. Select **Performance**, then **Expectations**.
2. To add or edit an expectation, select the **+ Add** button or **Pencil icon** to display details. To delete, select the **trash icon**.
3. Use the **Role field** to select the faculty member's role/s. This will reduce the list of expectations to only those associated with that role.
4. Select the **fiscal year**, then review the selected list.
5. Scroll down to the bottom of the expectations list. Select **Assign Selected**.
6. To comment, select the **pencil icon** at the right of that goal to display the expectation's details.

FY	Area of Work	Title	Details	Status	Comments	Add
← 2023	Teaching	SOM Required: Apply adult learning principles to enhance learning		--- New		[Add] [Pencil] [Trash]
← 2023	Teaching	SOM Required: Communicate session learning objectives		--- New		[Add] [Pencil] [Trash]
← 2023	Teaching	SOM Required: Exhibit professional behavior towards learners		--- New		[Add] [Pencil] [Trash]
← 2023	Teaching	SOM Required: Facilitate learning using active learning strategies		--- New		[Add] [Pencil] [Trash]
← 2023	Teaching	SOM Required: Implement teaching tools, methods, materials, modules		--- New		[Add] [Pencil] [Trash]
← 2023	Teaching	SOM Required: Participate in professional development activities to enhance teaching and learning		--- New		[Add] [Pencil] [Trash]
← 2023	Teaching	SOM Required: Prepare for teaching activities		--- New		[Add] [Pencil] [Trash]
← 2023	Teaching	SOM Required: Promote a positive learning environment		--- New		[Add] [Pencil] [Trash]
← 2023	Teaching	SOM Required: Provide feedback to learners		--- New		[Add] [Pencil] [Trash]

Assign optional standardized expectations

Role: Fiscal Year: 2023 + Add custom expectation

Search:

Area	Category	Expectation	Details
<input checked="" type="checkbox"/>	Teaching	Teaching & Learning	SOM Required: Promote a positive learning environment
<input checked="" type="checkbox"/>	Teaching	Teaching & Learning	SOM Required: Exhibit professional behavior towards learners
<input checked="" type="checkbox"/>	Teaching	Teaching & Learning	SOM Required: Communicate session learning objectives
<input checked="" type="checkbox"/>	Teaching	Teaching & Learning	SOM Required: Implement teaching tools, methods, materials, modules
<input checked="" type="checkbox"/>	Teaching	Teaching & Learning	SOM Required: Prepare for teaching activities
<input checked="" type="checkbox"/>	Teaching	Teaching & Learning	SOM Required: Facilitate learning using active learning strategies
<input checked="" type="checkbox"/>	Teaching	Teaching & Learning	SOM Required: Apply adult learning principles to enhance learning
<input checked="" type="checkbox"/>	Teaching	Teaching & Learning	SOM Required: Participate in professional development activities to enhance teaching and learning
<input checked="" type="checkbox"/>	Teaching	Teaching & Learning	SOM Required: Provide feedback to learners
<input checked="" type="checkbox"/>	Teaching	Supporting Learners	Basic Health Sciences Faculty: Mentor trainees, learners
<input checked="" type="checkbox"/>	Teaching	Supporting Learners	Clinical Faculty: Mentor trainees, learners

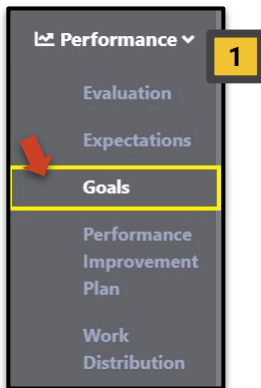
Need more help?
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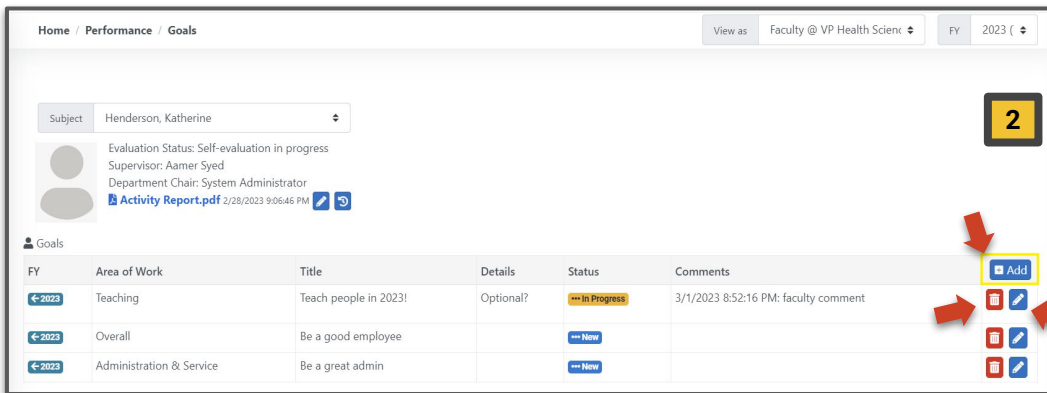
CREATE GOALS

The Goals section is open year round. Make sure all goals are up to date, review their status, and add any comments on your progress that you'd like. You may also add new goals both for the year you are being evaluation on and the upcoming year.

1. Select Performance, then Goals.



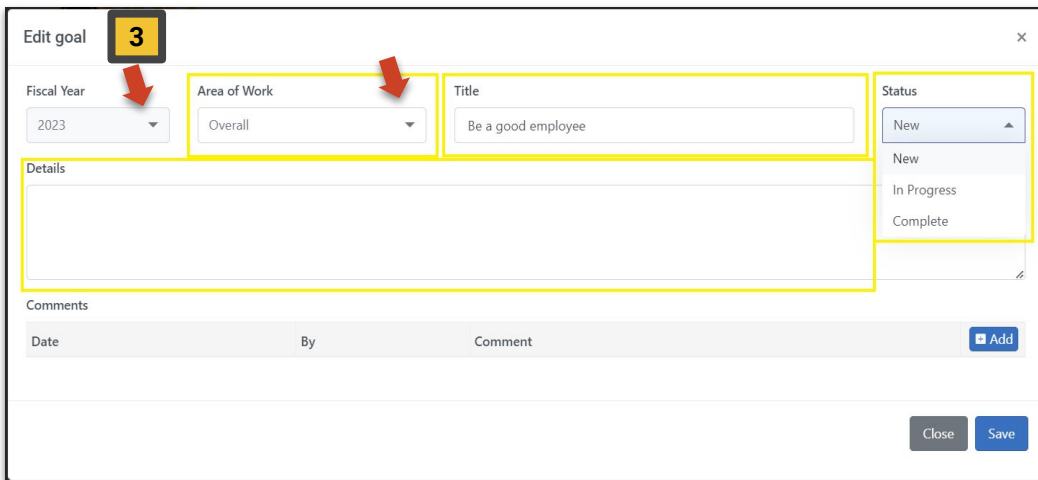
2. To add or edit an goal, select the + Add button or Pencil icon to display details. To delete, select the trash icon.



3. To enter a goal,

- Select a Fiscal year (the year being evaluated or period you are about to begin). **Note: Once goal is saved, the FY will not be changeable.**

- Choose an Area of Work, Title the goal, Set your goal status. **Note: All goals will automatically be set to "New" unless you take action. Add an optional Description.**



4. To comment on a goal, click the blue Edit button at the right of that goal.

Need more help?
See this [guide](#) or [video](#).





ADJUST DISTRIBUTION

Work Distribution lets your supervisor know how much of your work was spent in each area over the past year. It tracks Research, Teaching, Clinical Service, and Service and Administration; and is measured in percentages. The "Faculty Proposed" column must total to 100%.

1. Select **Performance**, then **Work Distribution**.
2. Select the **pencil icon** to edit an area of work. A pop-up menu will appear.
3. Review the approved percentage from the last fiscal year.

- If your column numbers differ, you will need to add a comment.
- Propose your work effort for the new fiscal year.
- This may be the same number in the Approved column from last fiscal year.

4. Ensure the numbers in your "Faculty Proposed" column will need to add up to 100% or you will not be able to submit your self-evaluation.

Need more help?
See this [guide](#) or [video](#).



Performance ▾

- Evaluation **1**
- Expectations
- Goals
- Performance Improvement Plan
- Work Distribution**

Home / Performance / Work Distribution

View as Faculty @ VP Health Scienc FY 2023

Subject: Henderson, Katherine

Evaluation Status: Self-evaluation in progress
Supervisor: Amer Syed
Department Chair: System Administrator
[Activity Report.pdf](#) 2/28/2023 9:06:46 PM

Work Distribution — adjusted at annual review

Area of work	← FY 2023		→ FY 2024		
	Approved	Faculty-Reported	Administration-Approved	Faculty-Proposed	Supervisor-Approved
Teaching	0.00%	0.00%	0.00%	0.00%	0.00%
Research	0.00%	0.00%	0.00%	0.00%	0.00%
Clinical Service	0.00%	0.00%	0.00%	0.00%	0.00%
Administration & Service	0.00%	0.00%	0.00%	0.00%	0.00%
Overall	0.00%	0.00%	0.00%	0.00%	0.00%

Edit Work Distribution: Teaching

← FY 2023		→ FY 2024		
Approved	Faculty Reported	Administration Approved	Faculty Proposed	Supervisor Approved
0.00%	25.00 %	0.00%	0.00 %	
	Comment Comment necessary		Comment	

Close Save

→ FY 2024

Faculty-Proposed	Supervisor-Approved
25.00%	
25.00%	
25.00%	
25.00%	
100.00%	

3

2

4



SUBMIT

The Self-Evaluation is the place where you can discuss your progress over the past year in each area of work, in professionalism, and overall. You can speak to your successes, your challenges, and give yourself a review rating for each.

1. Select **Performance**, then **Evaluation**.
2. Review your areas of work.
3. Rate the area of work.

The Rating fields in these four sections are required. Select between **Excellent**, **Very Good**, **Satisfactory**, **Needs Improvement**, **Unsatisfactory**, or **N/A**.

Only use **N/A** if your job and role within your school does not require any work within this area. If you select **Needs Improvement** or **Unsatisfactory**, a comment will be required before you can submit your evaluation.

4. Provide a comment.
5. Submit your evaluation.

Need more help?
See this [guide](#) or [video](#).



Performance ▾

Evaluation 1

Expectations

Goals

Performance Improvement Plan

Work Distribution

Showing 1 to 8 of 8 entries
Administration & Service Self-Evaluation by Kate Jones, MD

Select...

Excellent

Very Good

Satisfactory

Needs Improvement

Unsatisfactory

N/A 3

Showing 1 to 8 of 8 entries
Administration & Service Self-Evaluation by Kate Jones, MD

Select...

Cancel Save 4

Evaluation Summary 2

Evaluations by Work Area

Teaching

Research

Clinical Service

Administration & Service

Professionalism

★ Overall

Submit

Administration & Service

Administration & Service Goals

Title	Details	Status	Comments	Add
Be a great admin		New		Submit Edit

Administration & Service Expectations

Search:

FY	Title	Details	Status	Comments	Add
2024	SOM Required: Accept and participate in appropriate share of service assignments		New		Submit Edit
2024	SOM Required: Actively support departmental and institutional goals		New		Submit Edit
2024	SOM Required: Attend committee and faculty meetings regularly		New		Submit Edit
2024	SOM Required: Positively contribute to assigned committees		New		Submit Edit
2023	SOM Required: Accept and participate in appropriate share of service assignments		New		Submit Edit
2023	SOM Required: Actively support departmental and institutional goals		New		Submit Edit
2023	SOM Required: Attend committee and faculty meetings regularly		New		Submit Edit
2023	SOM Required: Positively contribute to assigned committees		New		Submit Edit

Submit 5