Screen Instructions for Annual Review & Professional Development Plan (PDP)

In order to complete your Annual Review & PDP, you must login to the system and interact with several screens. Not all screens pull data for the annual review – some are used to populate CVs and other reports. While you’re encouraged to complete all fields on a screen, only those fields in the instructions below are required for the annual report and PDP.

**Step 1. Login to the system:** [https://oie.mercer.edu/digital-measures/](https://oie.mercer.edu/digital-measures/)

**Step 2. Create Records.** Open the screens listed below and follow the instructions to create records that will pull into the annual review and PDP. Note that some screens have imported data. Your task on those screens is to review the information for accuracy. Contact Ellen Byron ([byron_em@mercer.edu](mailto:byron_em@mercer.edu)) if there are errors or omissions in your imported data.

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<thead>
<tr>
<th>SCREEN</th>
<th>FACULTY INSTRUCTIONS</th>
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<tbody>
<tr>
<td><strong>GENERAL INFORMATION</strong></td>
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</table>
| Personal Contact Information | 1. Review for accuracy  
2. Add preferred first and last name (if needed), endowed position (if any), office room number, and website. |
| Yearly Data | 1. Review for accuracy. |
| Administrative Assignments | Complete the following fields:  
• Position/Role  
• Unit  
• Responsibilities/Brief Description  
• Dates |
| Awards, Honors, and Honor Societies | Identify the Type of award and complete the following fields:  
• Award Name  
• Organization/Sponsor  
• Dates |
| Consulting and Outside Practice | Select Consulting or Outside Practice and complete the following fields:  
• Client/Organization/Employer Name  
• Client/Organization/Employer Type  
• Location (City, State, Country)  
• Brief Description  
• Dates |
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| **Academic Certificates**  <br>
*Only certificates completed during the reporting year will appear in the annual review.* | Complete the following fields:  
- Dates  
- Institution  
- Title  
- Additional Details |
| **Non-Degree Coursework**  <br>
*Only coursework completed during the reporting year will appear in the annual review.* | Complete the following fields:  
- Term and Year  
- Institution  
- Coursework Title, Prefix, Number and Credit Hours |
| **Faculty Development Activities**  <br>
*Faculty Development Activities are reported by focus (e.g., teaching, research, or service).* | Select the **Activity Type** and complete the following fields:  
- Title  
- Sponsoring Organization  
- Location (City, State, Country)  
- Primary Focus of Activity  
- Brief Description  
- Dates |
| **Media Appearances and Interviews**  <br>
*Media Appearances that relate to your area of expertise are reported as scholarship.* | Complete the following fields:  
- Article/Segment Title  
- Program/Media Outlet Name  
- Description  
- Publication/Air Dates |
| **Professional Memberships** | Complete the following fields:  
- Name of Organization  
- Description of the Organization  
- Dates |
| **Academic Advising** | Open each yearly record from your summary screen and review for accuracy. Complete the following fields:  
- Approximate Number of Hours Spent for the Year  
- Description of Advising Activities  
- List and describe your mentoring activities beyond regular advising  
- List and describe your registration activities and any issues you encountered |
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| Directed Student Learning | **Identify your Involvement Type** (e.g., master’s capstone advisor, dissertation committee member) and complete the following fields:  
- Course Name, if applicable  
- Student Information (Name, Type, Title, Stage of Completion)  
- Comments about faculty member involvement  
- Dates |
| Non-Credit Instruction | **Select the Instruction Type** and complete the following fields:  
- Sponsoring Organization  
- Number of Participants  
- Description  
- Dates |
| Scheduled Teaching | Open each course record on the summary screen and review for accuracy. Complete the following fields:  
- Did this course incorporate service-learning?  
- Service Category (if you had service learning in the course)  
- Optional: upload syllabus and course evaluation |
| Teaching Innovation and Curriculum Development | **Select the Activity Type** and complete the following fields:  
- Course or Program Name  
- Description of Activity  
- Dates |
| Contracts, Grants and Fellowships | **Select the Type** and complete the following fields:  
- Focus  
- Title  
- Sponsoring Organization  
- Awarding Organization Is  
- Current Status  
- Total Amount  
- Investigator Information  
- Dates |
| Exhibits, Performances, and Productions | Complete the following fields:  
- Type of Work  
- Work/Exhibit Title  
- Sponsor  
- Venue  
- Location  
- Brief Description  
- Performers/Exhibitors  
- Was this academic or non-academic?  
- Dates |
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<tr>
<td>Presentations</td>
<td>Complete the following fields:</td>
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<tr>
<td></td>
<td>• Presentation Title</td>
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<tr>
<td></td>
<td>• Conference/Meeting Name</td>
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<tr>
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<td>• Sponsoring Organization</td>
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<td>• Location</td>
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<td></td>
<td>• Presenter Information (name, role and if student)</td>
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<tr>
<td></td>
<td>• Date</td>
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<tr>
<td>Publications (Imported)</td>
<td>You don’t need to manually enter publications. You can import your published works with either a BibTeX file or via PubMed, Crossref or Web of Science.</td>
</tr>
<tr>
<td></td>
<td>Crossref: <a href="http://www.digitalmeasures.com/activity-insight/docs/crossref.html">http://www.digitalmeasures.com/activity-insight/docs/crossref.html</a></td>
</tr>
<tr>
<td></td>
<td>Web of Science: <a href="https://www.digitalmeasures.com/activity-insight/docs/wos.html">https://www.digitalmeasures.com/activity-insight/docs/wos.html</a></td>
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<td>Once you have loaded your publications, check them for accuracy and complete the following fields:</td>
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<td>• Current Status – those with accepted, in press or published status will appear in one of the Publications sections; any other status will appear in a section called Other Intellectual Contributions.</td>
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<tr>
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<td>• Was this peer-reviewed/refereed?</td>
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<td>• Web Address</td>
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<tr>
<td></td>
<td>• Author Information (name, institution, role, and if student)</td>
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<td>• Dates – complete at least the date associated with the current status of the publication. If the last date in the list falls within the report year, the entry will appear in your review.</td>
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<tr>
<td>Publications (Manually Entered)</td>
<td>If you don’t elect to import your publications, ensure that the following fields are completed (if applicable):</td>
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<tr>
<td></td>
<td>• Contribution Type</td>
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<tr>
<td></td>
<td>• Current Status – accepted or in press or published status will appear in Publications; any other status will appear in a section called Other Intellectual Contributions.</td>
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</table>
| **Publications** (Manually Entered) | • Title of Contribution  
• Title of Larger Work (if applicable)  
• Journal Name  
• Publisher  
• Location of Publisher (City, State, Country)  
• Issue Number/Edition  
• Page Numbers  
• Was this peer-reviewed/refereed?  
• Web Address  
• Author/Editor/Translator Information (name, institution, role, and if student)  
• Dates – complete at least the date associated with the current status of the publication. If the last date in the list falls within the report year, the entry will appear in your review. |
| **Research Activity**  
*This screen captures on-going research activity for which funding has not been sought.* | Complete the following fields:  
• Title  
• Description  
• Status  
• Dates |
| **University Service**  
*Service is reported by Scope (i.e., service to the University, College or Department; Department also means Site for most of you).* | **Select the Scope** and complete the following fields:  
• Position/Role  
• Organization/Committee  
• Responsibilities/Brief Description  
• Dates |
| **Professional Service**  
*This screen captures service to your profession (e.g., editor of journal). Your membership in an organization should be captured in the Professional Membership screen.* | Complete the following fields:  
• Position/Role  
• Organization/Committee/Journal  
• Responsibilities/Brief Description  
• Dates |
| **Public Service** | Complete the following fields:  
• Position/Role  
• Organization/Committee  
• Location (city, state, country)  
• Responsibilities/Brief Description  
• Dates |
### PCM Faculty Activity Report Supplement

The records you enter on this screen are pulled into the Teaching and Professional Development portions of your annual review. Enter the calendar year that is under review and then answer the reflective questions on teaching and professional development. **Complete all fields.**

### Professional Development Plan Goals

The records you enter on this screen are pulled into two reports that supplement the annual review:

1. **Penfield College Professional Development Plan Follow-Up** – this shows the status of the previous year’s PDP with your comments.
   a) Open the record that you created for the year in review.
   b) Update the status and provide comments, if necessary.

2. **Penfield College Faculty Professional Development Plan** – this shows your plans for the upcoming year.
   a) Enter the calendar year for the upcoming year and then enter the goals for your next PDP.
   b) Enter at least Goal Type, Goal Description, Plan of Action, Resources Needed, Time Frame, Anticipated Outcomes and/or Impact on Student Learning, and Status (either Planning or Implementing).

### Run Reports

The annual review in Penfield includes three different reports in Activity Insight:

1. **Penfield College Annual Faculty Report** – this pulls all of your activities for the year in review in one document.
2. **Penfield College Professional Development Plan** – this reports your PDP for the upcoming year.
3. **Penfield College Professional Development Plan Follow-Up** – this reports the status of the previous year’s PDP.

Once you have entered your activities and plans (or anytime while you are in the process of entering them), you can run your reports to see how things will display. To do this, follow these steps:

1. Click **Run Reports** link in the left menu on your Activity Insight main screen.
2. Select one of the Penfield reports:
   a. Penfield College Annual Faculty Report
   b. Penfield College Professional Development Plan
   c. Penfield College Professional Development Plan Follow-Up
3. Choose the appropriate start and end date. The PCM Annual Faculty Report and the Follow-Up should be run for the calendar year of review. The PCM Professional Development Plan should be run for the next calendar year.

4. Under Report Options, leave (a) and (b) as they are, but change (c) from Hide to Show. This will let you see the entire report, whether you have anything entered for a section or not; Hide allows you see what the chair/dean will see – only those sections in which you have activities to report.

5. Click Run Report. The system will generate and download a Word document. Review it. If anything looks off, let us know. You can contact us by clicking the Help button in the left sidebar or send an email to merceroieai@mercer.edu.