Step-by-Step Guide for Department Heads
AY 23-24 Promotion and Tenure

Access at Department Head’s Review Step

Reading the Candidate’s Case
You will receive an email notification to access the candidate’s case for review.

To review the different ways of accessing a candidate’s case in Interfolio, please see the Step-by-Step Interfolio Log In Guide.

At this step, you will be asked to review the materials in the candidate’s dossier, listed under the Candidate Packet section. To do this, you select the “Read Case” button, boxed in orange below:
You will be brought to a page that looks like this:

From here, you can click on the Candidate Packet section titles located on the left to review the candidate’s materials.

You can also access the Candidate Packet information by scrolling through and expanding each tab. To expand a tab, click on the “>” button located on the left of the section title you would like to review.

To view the documents within the section, click on the blue title of the document. This will bring you to the packet view above.
Completing the Department Head’s Recommendation Form
Once you have completed your review of the candidate, you will be required to fill out the Department Head’s Recommendation.

This form can be located by clicking “Case Details” on the candidate’s case home page, boxed in orange below.

If there is a required form that you must fill out, you will have a “1” indicated next to the “Case Details” button as pictured below:

After clicking on “Case Details,” scroll down until you see the “Required Items” section as shown below and then click on “Fill Out Form,” boxed in orange.
This year, we are giving the Department Heads the option to complete their narrative either using the fields of the Department Head’s Recommendation Form or by uploading a separate file, as has been done in past years.

Regardless of how you choose to submit their narrative, you must complete all of the fields of the form marked as required in Interfolio (designated by a red *) before the case can be moved forward.

If you choose to submit the narrative using the fields in the Interfolio form, all fields designated with a black * are also required.

The form looks as follows:
Department Head's Narrative
The department head's narrative can be submitted using the form fields below or it can be uploaded as a separate file from the Candidate Packet screen in the appropriate block under "Internal Sections." Note that you can edit this form as many times as you would like while the case is with the department head - just make sure you press save responses at the bottom of the page each time you work on it. The review will be final when you move the case to the next step. Recommended fields are marked with a black asterisk. 

Please select one option below:

- [ ] I will upload my narrative as a separate file.
- [ ] I will submit my narrative using the form fields below.

Candidate Accomplishments
Please provide an assessment of the candidate's accomplishments in each of the areas listed below.

Teaching*

Research/Scholarship/Creative Work*

Service*

0 / 8000 characters
**Annual Performance and Planning Reviews (APPR) and Retention Reviews**

*Annual Performance & Planning Reviews and Retention Reviews*

Provide a brief overview of the candidate's performance and progression towards promotion and/or tenure as reflected in the Annual Performance and Planning Reviews and/or Retention Reviews.

<table>
<thead>
<tr>
<th>Field</th>
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**External Reviews**

*External Reviews*

Provide an overview of the external reviews and your interpretations of these reviews. Be careful to maintain the anonymity of the external reviewers.

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<thead>
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<th>Field</th>
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Internal Reviews

Departmental Review Committee Recommendation*
Provide a summary and interpretation of the departmental review committee's conclusions and recommendations, as well as any minority reports and/or candidate responses.

Other Observations and Comments

Additional Information
Use the space below to provide additional information not accommodated in the boxes above, if needed.

Department Head's Overall Assessment and Recommendation

Assessment and Recommendation*
Please state your recommendation and summarize the major factors impacting your recommendation.

Next Steps Acknowledgement

Please read the instructions below and complete the acknowledgement.*
In order to fully complete your review, you will need to forward the case to the Faculty Affairs step. To do this, you will need to select "Submit Form" below. You will then select "Send Case" from the upper right-hand corner of your screen. From the dropdown, you will select "Forward to Faculty Affairs." From the resulting box, you will need to enter a subject for the message. We recommend “(Faculty Last Name) P&T/Promotion Only Case”. Select "Continue" on the box to fully forward the case.

Got it!

Submit Form  Save Responses  Return to Case
Once all required fields of the form have been completed, click the “Submit Form” button, boxed in orange.

This will bring up a confirmation box, on which you will click “Yes” to fully submit the form. *Note – you can continue to edit the form until the case is advanced to the next step.*

![Confirm](image)

**Uploading Department Head’s Narrative though a Separate Document**

Keep in mind that if you choose to submit a separate document containing your narrative, you will still have to complete the required fields (any question marked with a red asterisk “*”) within the Department Head’s Recommendation Form in Interfolio.

Once you have written your narrative, you will need to upload it to the Department Head’s Recommendation Section located within the Internal Sections area.

Internal Sections is located underneath all of the candidate packet information on the case’s home page so you will need to scroll down to reach it.
To expand the section, click on the “>” button, boxed in blue above. To upload a file, click on “Add File” boxed in orange below.

*Note, you can click “Add File” without expanding the section as well.*

Follow the same procedure for uploading a file as outlined in the “Uploading a File” subsection of the *Administrator’s Guide*.

Once you have completed all your requirements, you will move the case forward to the next step, “Faculty Affairs.” To do this, select “Send Case” located at the top of the candidate’s case home page. From the drop-down that appears, select “Forward to Faculty Affairs.”

After clicking “Forward to Faculty Affairs,” an email template will pop up that will look like this:

You can leave the default message but change the default subject to “P&T Case” before selecting “Continue,” boxed in orange above, to send the message and send the case.
Once the case has been moved forward to Faculty Affairs, it will be forwarded on to the next step.