Step-by-Step Guide for College/Intercollegiate Review Committee Members and Committee Managers AY 23-24 Promotion and Tenure

Access at College/Intercollegiate Review Committee Review Step

Reading the Candidate's Case

All committee members 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 <u>Step-by-Step</u> <u>Interfolio Log In Guide</u>.

As a committee member, 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:

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	Candidate Packet			
	Any materials added to the candidate packet will be files in an unlocked section before they submit	visible to the candidate and available for them to use in their car	nent case. The candidate will be able to replace or delete any	
	 Start Here: Click the 'Packet' tab all 	bove and complete Instructions and Guidelines Sec	tion (mote) 0 Lock	
	GENERAL INSTRUCTIONS			
	started. Once you've reviewed these instructions,	er? You are now ready to assemble your dossier for review. Plan you will need to complete the acknowledgement form found at institutive support staff to learn about internal workfows, exper-	t the bottom of this section. After you've done this, you	

You will be brought to a page that looks like this:

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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.

Statement of Responsibilities, Criteria Statements, and Other Documentation (Provided by Administrator)	Unlocked 🧲	Lock

To view the documents within the section, click on the blue title of the document. This will bring you to the packet view above.

Details Added by Megan Gast Mar 3, 2023	Actions Edit	
	Edit	
		Add
Details	Actions	
	Details Added by Megan Gast	

For Committee Managers: Completing the Committee Narrative

Once the committee has completed its review of the candidate, the Committee Manager will be required to fill out the College/Intercollegiate Review Committee Recommendation.

This form can be located by clicking "Case Details" on the candidate's case home page.

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:

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	Blake Stokes		Send Case 🗸 Case Options 🗸	
	Unit Provost Office	Template 1 - AY 23-24 Promotion Only Template (Colleges w/	Status Select Status	• [
	Provide Girle	Departments)	APPEND A CONTRACT	
	Case Material Case Details			
	Search case materials by title	Q Read Case		

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 .

✓ Required Items		1 missing
All required items must be completed before the case can advance to the next ste omit the form as a requirement for a user.	∋p. Forms must be completed by the as	signed user, however a Committee Manager or Administrator can select to
Forms		
Form Name	Assignee	Actions
AY 22-23 Promotion and/or Tenure - College/Intercollegiate Review Committee Recommendation 13 required questions	Committee Managers	Manage Respondents
AY 22-23 Promotion and/or Tenure - College/Intercollegiate Review Committee Recommendation 13 required questions	Blake Stokes (You)	Fill Out Form

This year, we are giving the College/Intercollegiate Review Committee the option to complete their narrative either using the fields of the College/Intercollegiate Review Committee Recommendation Form or by uploading a separate file, as has been done in past years.

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

The form looks as follows:

Y 22-23 Promotion and/or Tenure - College/Intercollegiate Review Comr ecommendation	nittee
ate of review committee discussion "	
ate "	
an additional meeting was held, please enter the date. ate	
	8
Thy was a second meeting needed?	
otes	
er a number for each. If none, enter 0, do not leave blank. If your departmental or college bylaws do not allow for abstensions or absentee voting, then enter 99.	
for *	
Against *	
Abstain *	
Recuse	
Neart*	
Absent *	

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Explanation of conflict of interest for recusal(s) *	
according to your bylaws, does this constitute a positive vote?	
O Yes	
O No	
iome units have two separate votes for tenure and promotion cases while others have one vote for both actions. Are the votes above for: "	
Both Tenure and Promotion	
) Tenure Only	
Promotion Only	
otes on Second Action (if needed)	
units that conduct two separate votes for tenure and promotion, record the results of the second vote below. If your unit does not conduct two separate votes, then you can skip this secti er a number for each. If none, enter 0, do not leave blank. If your departmental or college bylaws do not allow for abstensions or absentee voting, then enter 99.	n.
Which action is associated with these votes?	
○ Tenure	
O Promotion	
For	
Against	
Abstain	
Recuse	
Absent	
Explanation of conflict of interest for recusal(s)	

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issenting/M	inority Report	
s there a dissent	ng / minority report? *	
	with committee report or include in the form fields below.	
O Yes		
O No		
issenting State	vents	
The box below can I	e used to provide any disserting statements from committee members, if applicable. Disserting statements can also be uploaded separately	
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low was the form low are ballots st or electronic voting ommittee N committee's name this form as many en you move the ca ou plan to use the fi dis to submit the na Please select one	al vote taken (e.g., paper ballots, Zoom poll)?" pred and preserved (e.g., Where are they stored? Who maintains the file?)?" consider attaching a screen shot or other display of the ballots in the section where the departmental review committee chair uploads the narrative. arrative we can be submitted using the form fields below OR it can be uploaded as a separate file from the Case Details page (the same place you accessed this firms as you would like while the case is with the committee - just make sure you press save responses at the bottom of the page each time you work on et to the ment step. m fields below, take note that all required fields are marked with a black asterisk. However, interfolio will not flag these items as missing if they are left b rative is optional, so please track this if you use the form. (Only items with a red asterisk will be flagged by interfolio).	it. The review will be

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andidate Accomplishments are provide an assessment of the candidate's accomplishments in each of the areas listed below.	
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Research/Scholarship/Creative Work*	
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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 as reflected in the Annual Performance and Planning Reviews and/or	Retention Reviews.
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nternal Reviews	
Departmental Review Committee Recommendation*	
Provide a summary of the committee's discussion of the departmental review committee's conclusions and recommendations, as well as any minority reports and/or	candidate responses.
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Department Head Recommendation*	
Intercollegiate Review Committee can skip this item.)	
Provide a summary of the committee's discussion of the department head's recommendation, as well as any dissenting reports and/or candidate responses.	
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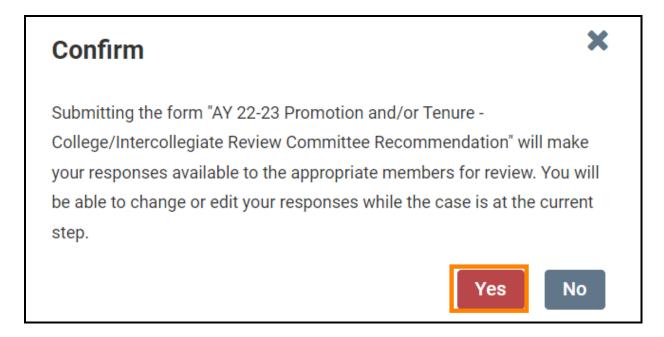
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udditional information the the space below to provide additional information not accomodated in the boxes above, if needed.	
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Assessment and Recommendation* Please state the committee's recommendation and summarize the major factors impacting the recommendation.	0 / 8000 characters

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.



Uploading College/Intercollegiate Review Committee's Narrative though a Separate Document

Keep in mind that if you choose to submit a separate document containing the committee's narrative, you will still have to complete the required fields (any question marked with a red asterisk "*") within the College/Intercollegiate Review Committee's Recommendation Form in Interfolio.

Once you have written your narrative, you will need to upload it to the College/Intercollegiate Review Committee'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.

For colleges with departments, the College/Intercollegiate Review Committee will be the College Review Committee and will upload their narrative to the "College or Intercollegiate Promotion and Tenure Committee Recommendation" section, boxed in orange below.

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For colleges without departments, the College/Intercollegiate Review Committee will be the Intercollegiate Review Committee and will upload their narrative to the "Intercollegiate Promotion and Tenure Committee Recommendation" section, boxed in orange below.

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	Internal Sections These sectors are exalisize to consistent mentions reasoning the sale and connective viewed by the candidate. Please note that some materials added to internal cectors can be shared with the candidate by an administration or connective internale.			
	Extensil Evaluations: General Instructions Edit Add File			
	External Evaluations: Materials Provided to External Reviewers Edit Add File			
	External Evaluations: Template Letter Edit Add File			
	External Evaluations: Log of Communications Edit Add Prix			
	External Evaluations: Method of Selection and Qualifications Edd Add File			
	> External Evaluations Add File			
	> College Review Committee Report Edit Add File			
	> IntercoTegiate Promotion and Tenure Committee Recommendation			• 18

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.

College or Intercollegiate Promotion and Tenure Committee Recommendation	Edit Add File
College or Intercollegiate Promotion and Tenure committee namative; Any minority report from the College or Intercollegiate Promotion and Tenure committee; Any candidate response to the College or Intercollegiate Promotion and Tenure committee report and/or minority report.	
Materials	
No files have been added to this section.	
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Intercollegiate Promotion and Tenure Committee Recommendation I. Intercollegiate Promotion and Tenure committee narrative; 2. Any minority report from the Intercollegiate Promotion and Tenure committee; 3. Any candidate response to the Intercollegiate Promotion and Tenure committee report and/or minority report.	Edit Add File
intercollegiate Promotion and Tenure committee narrative; Any minority report from the intercollegiate Promotion and Tenure committee;	Edit Add File
 Intercollegiate Promotion and Tenure committee narrative; Any minority report from the intercollegiate Promotion and Tenure committee; Any candidate response to the Intercollegiate Promotion and Tenure committee report and/or minority report. 	Edit Add File

Within the resulting pop-up, select "Browse To Upload," boxed in orange below, to view files saved on your device or from another storage location to which you have access.

Add File				×
Upload	Video	Webpage		
		Drag & Drop your files anywhere or Browse To Upload		
			✓ Save	Cancel

Choose the document that you would like to upload and select "open" to continue upload. As an example, a successful upload will look like this:

1

Add File			×
Add New File	Previous F	eviews	
Upload	Video	Webpage	
Name			
Interfolio T	est		×
			Save Cancel

Select "Save" to save your upload. The saved and uploaded document will now appear under the section to which it was uploaded. For example, in the picture below, Megan Gast successfully uploaded "Interfolio Test" to the "Statement of Responsibilities" section.

		_
tatement of Responsibilities 1 required		Add
itle	Details	Actions
Interfolio Test	Added by Megan Gast Mar 3, 2023	Edit
partment and College Statements of Criteria and Exped	tations 1 required	Add
itle	Details	Actions

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."

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Megan Gast			Send Case 🗸	Case Options 🗸
Unit	Template	Forward to Foculty Affairs		
Provost Office	1 - AY 23-24 P&T Template (Colleges w/ Depai	Backwards to Faculty Atlains		
Case Materials Case Details				
Search case materials by title				

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

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Great job to the ca	If You're sending the case forward to the next step, Faculty Affairs. The following reviewers will lose accurate the sendence of the senden	ess
	set 0 members	
Dept Ca	se Facilitator 0 members	
College	Case Facilitator 0 members	
The follo	wing reviewers will gain access to the case:	
VPFA C	mmillee 2 members	
Ser.	I a message to the reviewers gaining access.	
If rec	ipients respond to this message, their response will come directly to your email inbox.	
Subject		
		-
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8.0	$ 8 \mathbf{I} \mathbf{I}_{\mathbf{k}} \equiv \equiv \pm \pm \pm \pm \pm 2 \mathbf{\Omega} $	
Dearc	omnilise members.	
The ci	se is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you	
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Megar	Gent	

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 forward.

Once the case has been moved forward to Faculty Affairs, it will be forwarded on to the next step in accordance with the time periods allocated within the Faculty Handbook.