Step-by-Step Guide for Deans AY23-24 Promotion and Tenure Access at Dean'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:

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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.

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

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Completing the Dean's Recommendation Form

Once you have completed your review of the candidate, you will be required to fill out the Dean'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:

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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.

 Required Items 		1 missing			
All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can sele omit the form as a requirement for a user.					
Form Name	Assignee	Actions			
AY 23-24 Promotion and/or Tenure - Dean's Recommendation 3 required questions	Committee Managers	Manage Respondents			
AY 23-24 Promotion and/or Tenure - Dean's Recommendation 3 required questions	Megan Gast (You)	Fill Out Form			

This year, we are giving the Deans the option to complete their narrative either using the fields of the Dean'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:

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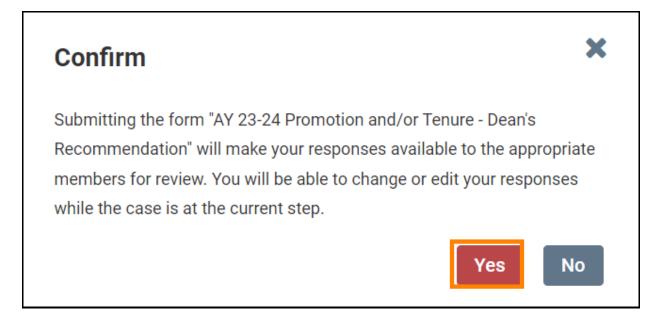
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External Reviews*	
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Please state your recommendation and summarize the major factors impacting your recommendation.	
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Once all required fields of 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 Dean'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 Dean's Recommendation Form in Interfolio.

Once you have written your narrative, you will need to upload it to the Dean'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.

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		Departmental Review Committee Report		Edit	Add File	
		Department Head's Recommendation		Edit	Add File	
		College or Intercollegiate Promotion and Tenure Committee Recommendation		Edit	Add File]
		Dean's Recommendation		Edit	Add File	
		Chief Academic Officer's Recommendation		Edit	Add File	

To expand the section, click on the ">" button.

To upload a file, click on "Add File" boxed in orange below. Note - you can click "Add File" without expanding the section as well.

Pean's Recommendation	Edit Add File
Dean's recommendation; Any candidate response to the dean's recommendation.	
Materials	
No files have been added to this section.	

Follow the same procedure for uploading a file as outlined in the "Uploading a File" subsection of the Administrators 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."

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

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The fo	lowing reviewers will gain access to the case:	
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Se Se	nd a message to the reviewers gaining access.	
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The sign	case is coming your way for review. You'll be able to see the documents and deadlines in Review. Promotion & Tenure when you in	
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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.