Step-by-Step Guide for Unit Review
# Committee Members and Committee Managers
AY23-24 Promotion and Tenure
Access at Unit Committee Review Step

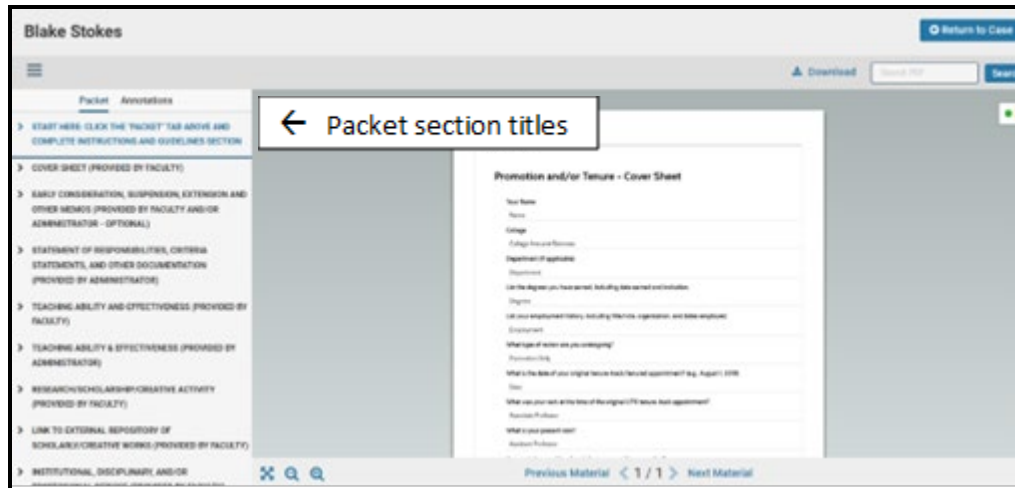**Reading the Candidate's Case**

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 Step-by-Step Interfolio Log In Guide.

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:
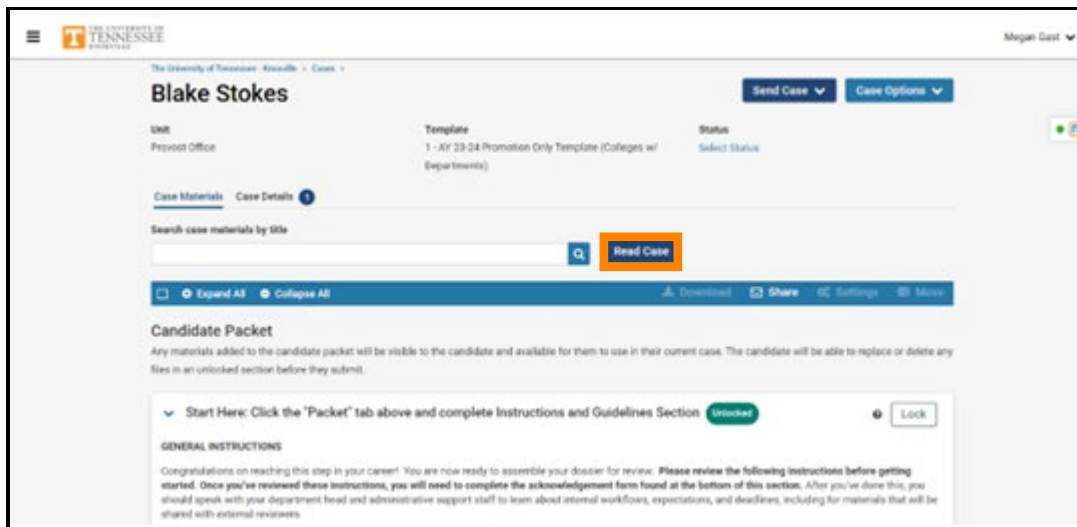

You will be brought to a page that looks like this:

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.
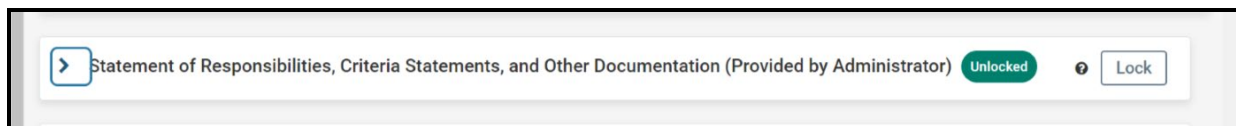
To view the documents within the section, click on the blue title of the document. This will bring you to the packet view above.
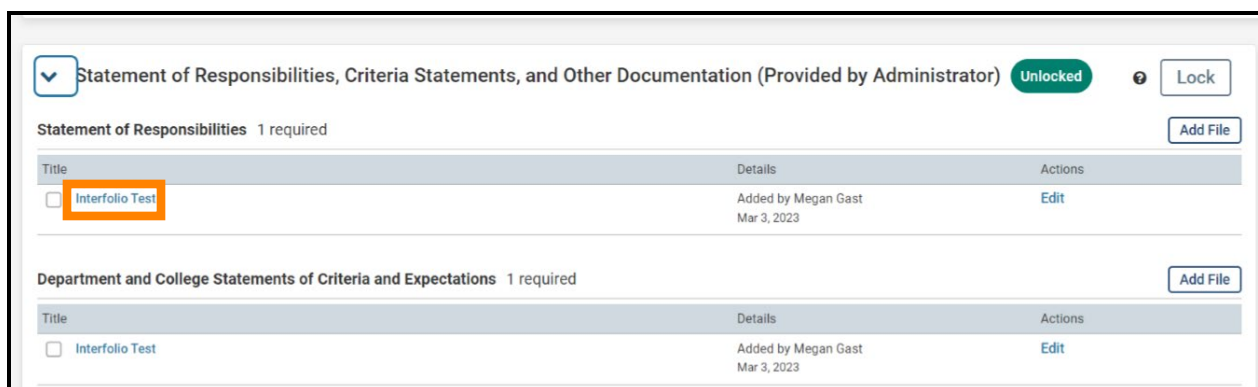
For Committee Managers: Completing the Committee Narrative
Once the committee has completed its review of the candidate, the Committee Manager will be required to fill out the Unit Review Committee Recommendation.

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:

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 Unit Review Committee the option to complete their narrative either using the fields of the Unit 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:

AY 23-24 Promotion and/or Tenure - Unit Review Committee Recommendation

Date of unit discussion *
Date *

[   ] 📅

If an additional meeting was held, please enter the date.
Date

[   ] 📅

Why was a second meeting needed?

[   ]

Votes

Enter 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 *

[   ]

Absent *

[   ]

Explanation of conflict of interest for recusal(s) *

If no recusals, please put N/A.

According to your bylaws, does this constitute a positive vote? *

○ Yes

○ No

Some 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

Votes on Second Action (if needed)

For 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 section.

Enter a number for each. If none, enter 0, do not leave blank. If your departmental or college bylaws do not allow for abstentions or absentee voting, then enter 99.

Which action is associated with these votes?

○ Tenure

○ Promotion

For

Against

Abstain

Recuse

Absent

Explanation of conflict of interest for recusal(s)

Dissenting/Minority Report

Is there a dissenting / minority report? *
If yes, please attach with committee report or include in the form fields below.

○ Yes

○ No

Dissenting Statements
The box below can be used to provide any dissenting statements from committee members, if applicable. Dissenting statements can also be uploaded separately.

Manner of Taking and Recording Votes

How was the formal vote taken (e.g., paper ballots, Zoom poll)? *

How are ballots stored and preserved (e.g., Where are they stored? Who maintains the file?)? *

Committee Narrative

The committee's narrative 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 form). Note that you can edit this form as many times 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 it. The review will be final when you move the case to the next step.

If you plan to use the form 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 blank since use of these fields to submit the narrative is optional, so please track this if you use the form. (Only items with a red asterisk will be flagged by Interfolio).

Please select one option below: *

○ The committee narrative will be uploaded as a separate file.

○ The committee narrative will be submitted using the form fields below.

Candidate Accomplishments

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

Teaching*

0 / 8000 characters

Research/Scholarship/Creative Work*

0 / 8000 characters

Service*

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.

External Reviews

External Reviews*

Provide a summary of the committee's discussion and conclusions regarding the external reviews. Be careful to maintain the anonymity of the external reviewers.

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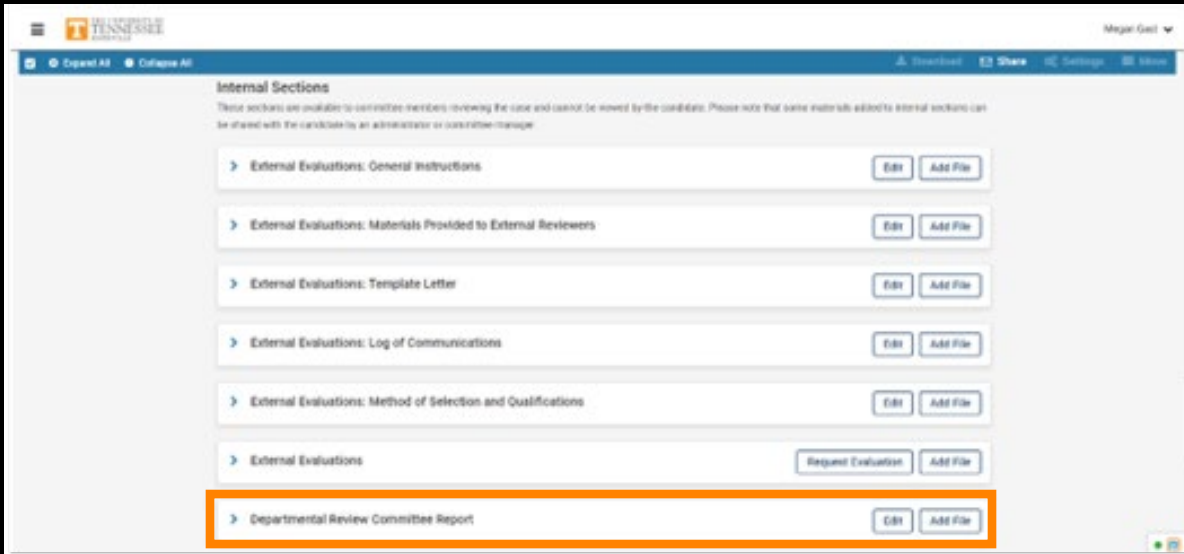
Uploading Unit Review Committee's Narrative though a Separate Document
Keep in mind that if you choose to submit a separate document containing the committee's narrative, you will still have to complete the required fields (any question marked with a red asterisk "*") within the Unit Review Committee's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

Once you have written your narrative, you will need to upload it to the Unit 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 Unit Review Committee will be the Departmental Review Committee and will upload their narrative to the "Departmental Review Committee Report" section, boxed in orange below.

For colleges without departments, the Unit Review Committee will be the College Review Committee and will upload their narrative to the "College Review Committee Report" section, boxed in orange below.
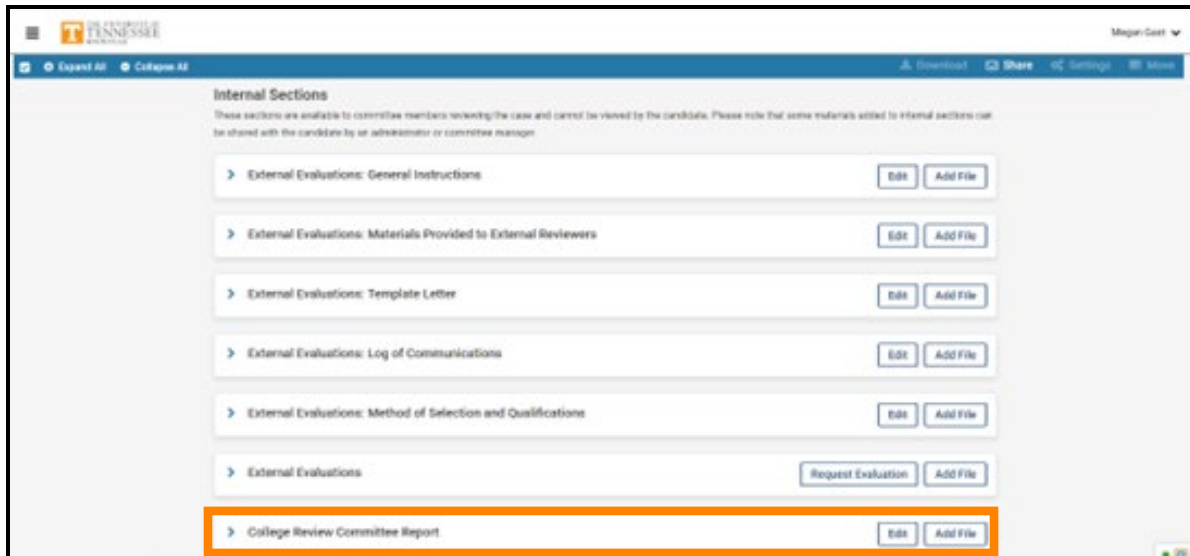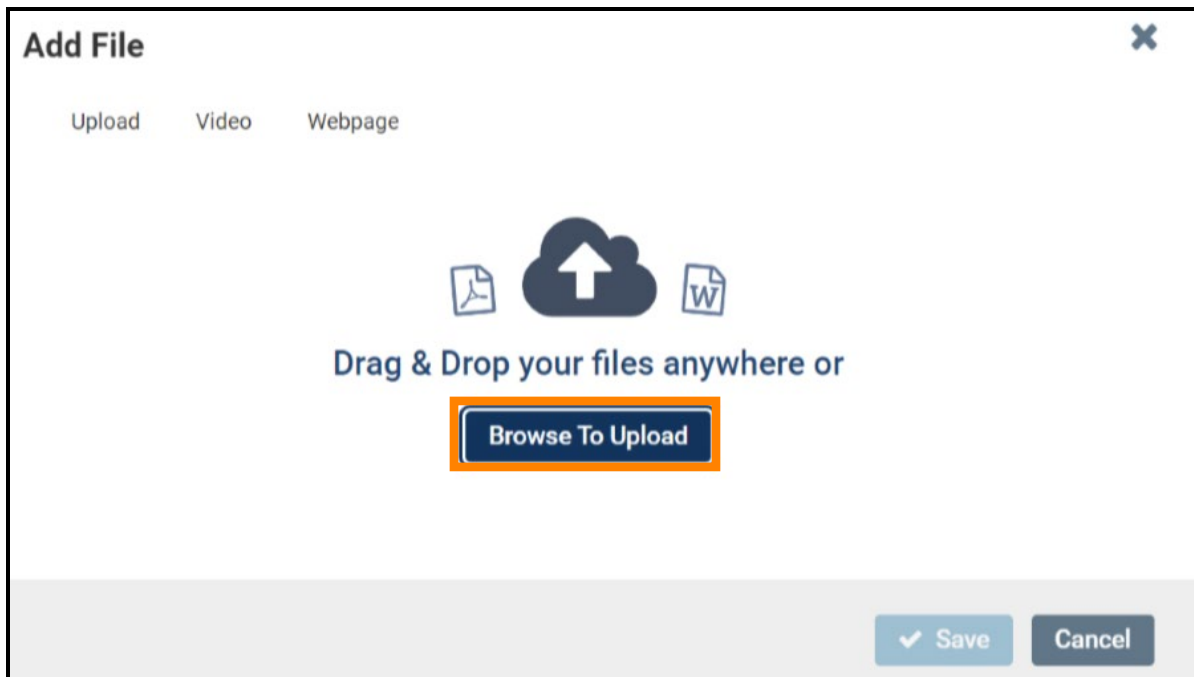
To expand the section, click on the ">" button, boxed in blue above.

To upload a file, click on "Add File" boxed in orange below.
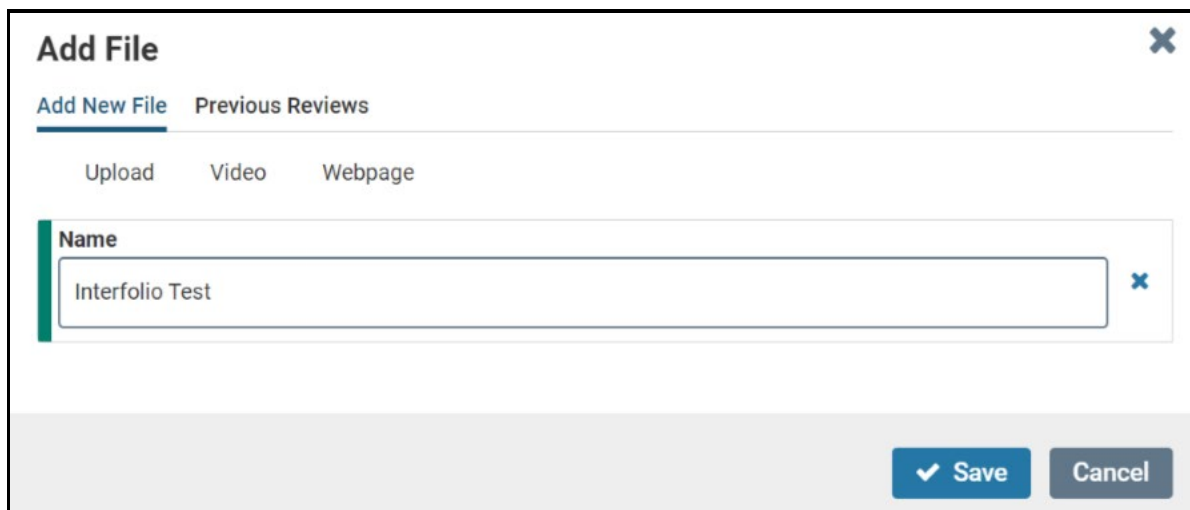*Note - you can click "Add File" without expanding the section as well*.
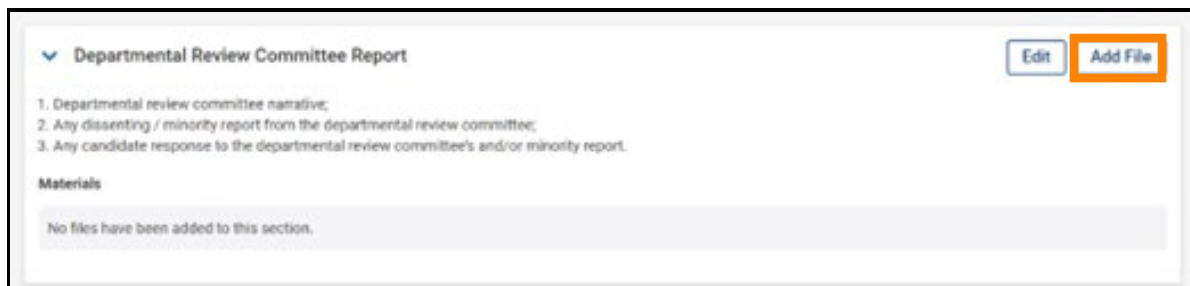
Within the resulting pop-up, select "Browse To Upload," boxed in orange below, to view files saved on your device or from another storage location to which you have access.

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:

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.

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 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.