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 <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 our	rent case. The candidate will be able to replace or delete any	
	 Start Here: Click the 'Packet' tab ab 	ove and complete instructions and Guidelines Sect	tion (tricese) O Lock	
	GENERAL INSTRUCTIONS			
	started. Once you've reviewed these instructions,	et You are now ready to assemble your dossile for review. Plea you will need to complete the acknowledgement form found at institutive support staff to learn about internal workform, exper-	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.

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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:

The University of Tennessee - Knowlife > Cases >			
Blake Stokes		Send Case 🗸 Case Opt	ions 🗸
Unit	Template	Status	
Provost Office	1 - AY 23-24 Promotion Only Template (Colleges w/ Departments)	Select Status	
Case Materials Case Details			
Search case materials by title			

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 missir			
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 sel omit the form as a requirement for a user.					
Forms					
Form Name	Assignee	Actions			
	Committee Managers	Manage Respondents			
AY 23-24 Promotion and/or Tenure - Unit Review Committee Recommendation 13 required questions	-				

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:

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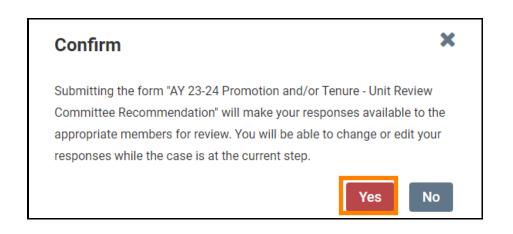
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Once all required fields of the form have been completed, click the "Submit Form" button, boxed in orange.

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.*



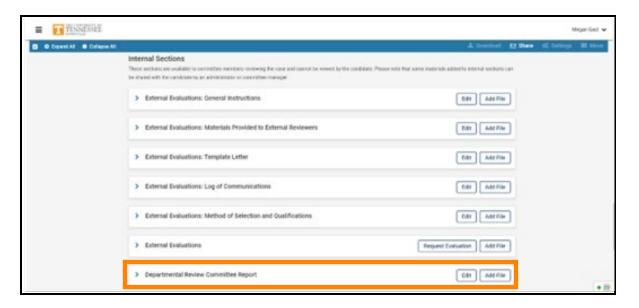
Uploading Unit Review Committee's Narrative though a Separate Document

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.

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	Internal Sections These sectors are evaluate to convertise members weaking the case and carrot be viewed by the candidate to showed with the candidate by an administrator or converting manager	. Phase role but some mularary added to Hamal sectors can
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	> External Evaluations	Request Evaluation Add File
	> College Review Committee Report	Eds Add File

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.

Departmental Review Committee Report	Edit Add File
 Departmental review committee narrative; Any dissenting / minority report from the departmental review committee; Any candidate response to the departmental review committee's and/or minority report. 	
Materials	
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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:

Add File				×
Add New File	Previous R	Reviews		
Upload	Video	Webpage		
Name Interfolio T	est			×
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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.

Statement of Responsibilities 1 required		(Add F
Title	Details	Actions	
Interfolio Test	Added by Megan Gast Mar 3, 2023	Edit	
epartment and College Statements of Criteria and Expec	tations 1 required	(Add i
Title	Details	Actions	
Interfolio Test	Added by Megan Gast	Edit	

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."

The University of Tennessee - Knowfile -> Cases ->				
Megan Gast			Send Case 🗸	Case Options 🗸
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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:

Send Case Forward	×
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Dear committee members,	
This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign is,	
Best, Megan Gast	
	4
@ Preview Continue Canc	-

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.