

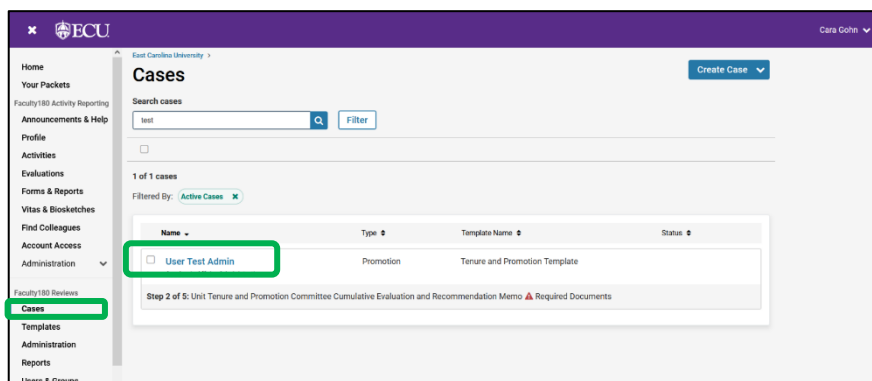
Step 2 – Unit Promotion & Tenure Committee Complete Evaluation and Recommendation Memo

In this guidance you will learn how to:

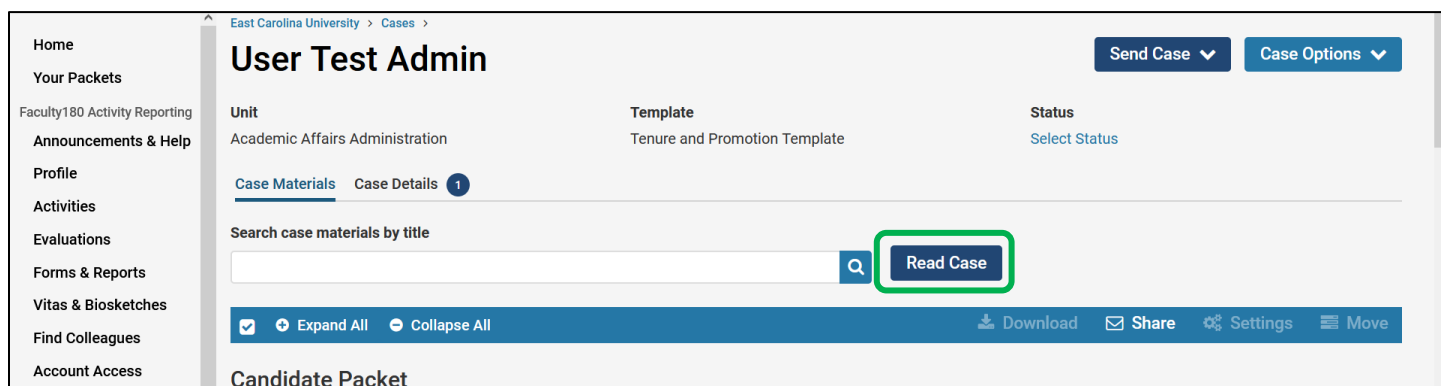
1. Access the case
2. Review the PAD
3. Upload the Cumulative Evaluation
4. Complete the Recommendation
5. Share the Cumulative Evaluation and Receive the Candidate Response
6. Send the case forward to the Unit Administrator

When the chair/unit administrator completes Step 1 of the case it will be forwarded to Step 2 and the Unit Promotion & Tenure Committee will receive an email.

1. Committee members can access the case from the emails, Faculty180 home screen, or by navigating to the “Cases” menu under the Faculty180 Reviews section. Use the search bar to search by name, if needed. Navigate to the case by clicking on the faculty member’s name.



2. Committee members can choose “Read Case” to see all attached documentation from the faculty member and recommendations and letters uploaded by previous reviewers.



Documents can be read using the left-hand navigation menu and can be exported by clicking on the “Download” button. Exit this screen by clicking on “Return to Case.”

The screenshot shows the 'User Test Admin' interface. On the left is a navigation menu with a 'Packet' tab selected. The menu items are: EXTERNAL REVIEWERS: LIST AND SELECTED DOCUMENTS, CANDIDATE'S SUMMARY (FROM PART X.I.A), CUMULATIVE REPORT, RECORDS OF EVALUATION (FROM PART X.I.C), SUPPORTING MATERIALS (FORMERLY IN PART D), OTHER MATERIAL (FORMERLY IN PART E), DISAGREEMENTS AS TO INCLUSION OR REMOVAL OF DOCUMENTS (FORMERLY IN PART F), PERSONNEL SUMMARY ACTION FORM, EXTERNAL EVALUATIONS, and CUMULATIVE EVALUATIONS (FORMERLY IN PART B). The 'Download' button is in the top right, and the 'Return to Case' button is in the top right corner. A search bar is also present.

3. Committee chairs should navigate to the “Case Details” tab to complete the required documents. A number will appear next to the “Case Details” tab that indicates how many tasks require completion.

The screenshot shows the 'User Test Admin' interface with the 'Case Details' tab selected. The 'Case Details' tab has a '3' next to it, indicating three tasks require completion.

Note – If a case is routed to you and you do not see a number next to “Case Details” then you are a committee member. Only committee managers have the ability to submit documents and forms and move the case forward. At the bottom of the Case Details screen you can also see a list of members and managers.

Scroll down to the “Required Items” section and **upload the Cumulative Evaluation** by clicking the “Add” button.

The screenshot shows the 'Required Items' section. It has a '3 missing' indicator. Below the title is a description: 'All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.' Below this is a section titled 'Unit Promotion and Tenure Committee Cumulative Evaluation' with an 'Add' button. Below the 'Add' button is a text box: 'Please include this document in the “Cumulative Evaluations (formerly in Part B)” Section. Please share this document with the candidate so that the candidate may provide a response if desired within 7 working days. Responses must be considered prior to committee recommendation.' Below the text box is a message: 'No files have been added to this section.'

Choose “Cumulative Evaluations (formerly in Part B)” as the section and click “Add.”

The screenshot shows the 'Add Unit Promotion and Tenure Committee Cumulative Evaluation' dialog box. It has a title bar and a close button. Below the title bar is a section for uploading a file. Below this is a text box: 'Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.' Below the text box is a form with two fields: 'Name' and 'Section'. The 'Name' field contains 'Test Document' and the 'Section' dropdown menu is set to 'Cumulative Evaluations (formerly in Part B)'. Below the form is an 'Add' button and a 'Cancel' button.

4. Next, complete the recommendation form. Click “Fill Out Form.” Select the recommendation and then click “Submit Form.”

Form Name	Assignee	Actions
Indicator of Candidate Response 1 required questions	Committee Managers	Manage Respondents
Indicator of Candidate Response 1 required questions	Cara Gohn (You)	Fill Out Form
Tenure and Promotion Recommendation 1 required questions	Committee Managers	Manage Respondents
Tenure and Promotion Recommendation 1 required questions	Cara Gohn (You)	Fill Out Form

Tenure and Promotion Recommendation

Tenure and Promotion Recommendation *
Consistent with Part IX of the Faculty Manual, this Committee met to consider the award of tenure to and promotion of this candidate. After reviewing the candidate's materials, a majority of the Committee _____ (see below) that the candidate be awarded tenure and promoted.

Recommends

Does Not Recommend

Submit Form Save Responses Return to Case

5. The cumulative evaluation must be shared with the candidate within Faculty180 Reviews. Navigate back to the “Case Materials” tab, scroll down to the “Cumulative Evaluations (formerly in Part B)” section, open the section using the arrow in the left corner, click the checkbox next to the evaluation document, then click “Share” > “With Candidate.”

Home **User Test Admin** Send Case ▼ Case Options ▼

Your Packets

Faculty180 Activity Reporting

Announcements & Help

Profile

Activities

Unit: Academic Affairs Administration Template: Tenure and Promotion Template Status: Select Status

Case Materials Case Details 3

Home Your Packets Faculty180 Activity Reporting Announcements & Help Profile Activities Evaluations Forms & Reports Vitas & Biosketches Find Colleagues Account Access Administration

Expand All Collapse All Download **Share** Settings Move

Personnel Summary Action Form With Candidate With Committee Members

External Evaluations Request Evaluation Add File

Cumulative Evaluations (formerly in Part B) Edit Add File

Title	Details	Actions
<input checked="" type="checkbox"/> Test Document	Added by Cara Gohn Mar 1, 2022	Edit

After clicking “Share” > “With Candidate”, a new screen will appear with the evaluation attached at the bottom.

Enter a subject line and message to the candidate. The recommendation of the committee is not automatically shared with the candidate when the form is completed. **The committee chair may want to include the recommendation in the email message** when sharing the Cumulative Evaluation with the faculty member. Then, click the checkbox next to “Enable” file response.

Message Reason = Candidate Response

Deadline = Today + 7 Working Days

Section for Response = Candidate Responses

Message to Candidate

To: User Test Admin (faculty180@ecu.edu)

Subject *
Test Cumulative Evaluation

Message *
Hello Candidate,
Please review the committee's evaluation. Provide comments within 7 days.

File Response:
 Enable

Message Reason
Candidate Response

Deadline
Mar 7, 2022

Section for Response *
Candidate Responses

After the candidate responds to the evaluation, the committee will receive an email notification that a response was received.

The response can be viewed in the “Read Case” window or at the bottom of the “Case Materials” page under the “Candidate Response” section.

If the candidate response is received outside of Faculty180, then the response can be uploaded to the “Candidate Responses” section on the “Case Materials” tab.

If there is no response from the candidate, it is recommended that the candidate still upload a response including the statement – “No Response.”

User Test Admin

Unit
Academic Affairs Administration

[Case Materials](#) | [Case Details](#) 3

When the candidate comments have been received or uploaded, the committee chair will fill out the “Indicator of Candidate Response” forms on the “Case Details” tab of the case.

Form Name	Assignee	Actions
Indicator of Candidate Response 1 required questions	Committee Managers	Manage Respondents
Indicator of Candidate Response 1 required questions	Cara Gohn (You)	Fill Out Form

After answering the form question, click “Submit Form.”

Indicator of Candidate Response

Does the candidate have a response to the cumulative evaluation? *

According to Part IX of the Faculty Manual, candidates shall receive copies of cumulative evaluations and to have 7 working days to respond. Does the candidate have a response to the cumulative evaluation? If yes, upload the response to the Candidate Responses internal case section. [Internal note: discrepancy between FM and guidelines about whether to wait 7 days for response prior to sending the recommendation and cumulative evaluation to the unit administrator.]

Yes

No

Submit Form Save Responses Return to Case

6. After all required components are completed, the committee chair will forward the case by clicking on the “Send Case” button and choosing “Forward to.”

East Carolina University > Cases >

User Test Admin

Unit: Academic Affairs Administration | Template: Tenure and Promotion Template

Case Materials | Case Details

Reviewing as: Unit Promotion Committee

Instructions

Send Case Case Options

Forward to: Unit Administrator Cumulative Evaluation, Recommendation Memo, and Personnel Action Summary Form

Backwards to: Unit Administrator Adds External Reviews

The committee manager will be prompted to enter an email subject and click “Continue” to email the appropriate party in the next workflow step.

Send Case Forward

Great job! You're sending the case forward to the next step, Unit Administrator Cumulative Evaluation, Recommendation Memo, and Personnel Action Summary Form. The following reviewers will lose access to the case:

Unit Promotion Committee | 1 members

The following reviewers will gain access to the case:

Unit Administrator | 1 members

Send a message to the reviewers gaining access.

If recipients respond to this message, their response will come directly to your email inbox.

Subject *

Step 2 Evaluation Completed

Message *

Preview **Continue** Cancel

The unit committee’s evaluation and recommendation must be submitted by the 4th Tuesday in October. **Faculty180 does not automatically notify candidates when a recommendation is recorded. Please notify the candidate, committee chair, and the unit administrator (if applicable) as required by the Faculty Manual. This notification must be sent outside of Faculty180.**