Reappointment for Tenure Track Faculty in Faculty180 Reviews

1. Standard P&T Faculty180 Review Workflow Steps (Page 1)
2. Workflow Step, Reappointment Schedule Comparison (Page 2)
3. Workflow FAQs (Page 3)
4. Step 0 – Candidate Completes PAD Requirements (Page 5)
5. Step 1 – Unit Administrator/Chair Confirms PAD is Completed (Page 8)
6. Step 2-4 – Committees, Unit Administrator and Dean Complete Recommendation Memo (Page 12)
7. Final Step – Division Personnel Representatives Close Case (Page 16)

1. Standard Reappointment Faculty180 Reviews Workflow Steps

Promotion & Tenure Case is opened by an Administrator

Step 0 – Faculty member submits required sections.

   Note: Submitting a section will lock that section to the faculty member and no further editing will be available within that section.

Step 1 – Chair/Unit Administrator Confirms PAD is Completed
   - Unit administrator completes electronic form confirming PAD is completed
   - After completing the form, the chair/unit administrator forwards the case to the Unit Tenure Committee

Step 2 – Unit Tenure Committee Completes Recommendation Memo
   - After completing the memo, the committee forwards the case to the chair/unit administrator

Step 3 – Chair/Unit Administrator Completes Recommendation Memo
   - After completing the memo, the chair/unit administrator forwards the case to the Dean
     (or BSOM Personnel Representatives for Brody School of Medicine faculty)

Step 4 – Dean Completes Recommendation Memo
   - After completing the memo, the Dean forwards the case to the Division Personnel Representatives
   - BSOM Only – College level HR representatives will extract documents to continue the process outside of Faculty180 Reviews.

Step 5 – Division Personnel Representatives Close Case
   - Representative(s) will extract materials and share them with the Provost and continue the process outside of Faculty180 Reviews.
2. Workflow Step, Reappointment Schedule Comparison

Reappointment of Probationary-Term Faculty Members Timeline

<table>
<thead>
<tr>
<th>Action</th>
<th>9 Month Faculty Deadline</th>
<th>12 Month Faculty Deadline</th>
<th>Approx. Time Allotted for Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAD due to Tenure Committee for reappointment decision</td>
<td>3rd Tuesday in January</td>
<td>4th Tuesday in February</td>
<td></td>
</tr>
<tr>
<td>Committee recommendation to unit administrator</td>
<td>2nd Tuesday in February</td>
<td>3rd Tuesday in March</td>
<td>3 weeks</td>
</tr>
<tr>
<td>Unit administrator recommendation to Dean (if applicable)</td>
<td>1st Tuesday in March</td>
<td>2nd Tuesday in April</td>
<td>3 weeks</td>
</tr>
<tr>
<td>Dean recommendation to VCAA or VCHS</td>
<td>Last Tuesday in March</td>
<td>1st Tuesday in May</td>
<td>3 weeks</td>
</tr>
<tr>
<td>VCAA or VCHS decision</td>
<td>Last Tuesday in April</td>
<td>1st Tuesday in June</td>
<td>4 weeks</td>
</tr>
</tbody>
</table>

Case is started in December and Step 0 is initiated.

As each section of the PAD is submitted the Chair/Unit Administrator will be notified. The Chair or Unit/Admin should complete the electronic form confirming the PAD is completed in Step 1 and forward the case to Step 2 by the 4th Tuesday in February.

Step 2 - Tenure Committee completes recommendation and forwards the case to Step 3.

Step 3 – Unit Administrator completes recommendation and forwards the case to Step 4.

Step 4 – Dean completes recommendation and forwards the case to Step 5.

In the last case step, Division level (or College level for BSOM) personnel representatives will extract materials from the case to share with the appropriate leadership and all further reviews and decisions will occur outside of Faculty180 Reviews. Division/College level personnel representatives will close the case.
3. Workflow FAQs

- **How do I know if something is in my queue for review?** The system will generate an email to you when an evaluation or review hits the step in which you are named a committee member or manager.

- **How do I know which documents or forms to complete within my workflow step?** When you open a case, go to the “Case Details” tab to see required documents and forms. The number displaying next to the tab indicates the number of required documents or forms.

- **What if a previous reviewer needs to make a correction?** Using the “Send Case” button, administrators or case managers in the current workflow step can send a case backwards to the previous reviewer.

- **What if a required form appears blank?** Clear your browser cache and cookies, close and re-open the browser, and then navigate back to the case form.

- **As a reviewer, how do I share the documentation without moving the case forward?** You can (1) download documents from the “Read Case” screen and email it to the faculty member or (2) from the case materials screen, scroll down to the appropriate section, open the section using the arrow to the left of the section, and check the box next to the document to be shared. Then click “Share” at the top of the screen and choose the appropriate recipient. You will be prompted to complete a subject line and message, click “Send.”
As a reviewer, what if I have additional documents to attach that are not part of the required tasks in my step? On the case landing page, the “Case Materials” tab, you can scroll down to the “Internal Sections” portion and click “Add File” within the appropriate category.
4. Step 0 – Candidate Completes PAD Requirements

When the case is opened and sent to the candidate, the candidate will receive an email notification.

Navigate to the case from the email, from the home page of Faculty180, or from “Your Packets” menu in Faculty180.

Navigate to the “Packet” tab and begin uploading documents to each of the PAD sections by clicking the “Add” button.
When adding documents, the candidate can select “Add New File” to upload from their local computer or “Choose Existing” to locate files within the materials and collections saved in Dossier.

The candidate can continue clicking “Add” in each section to add multiple documents.

The sections are defined at the template level and can not be reordered. However, attachments within a section can be reordered. The default order of attachments is the order in which you upload them and the order that they appear on the screen. Reorder attachments by clicking and holding your mouse over the attachment in which you want to move. Drag it to the new location.
When all documents are attached to a particular section the candidate will click “Submit” for that section. The system will automatically notify the unit administrator in the next step. The candidate can continue to work on other sections and submit them individually or all at one time before the deadline.

Note: Submitting sections will lock that section to the candidate and no further editing will be available within that section. However, candidates can submit sections prior to the deadline to give their unit administrator/Chair access to the files. The section can easily be unlocked by a College Coordinator or the Faculty180 Coordinator if additional editing is required prior to the deadline. Unlocking sections after the deadline will require additional approval. See Dossier Guidance for additional ways to share PAD documents prior to submitting the final version in the case.
5. Step 1 – Unit Administrator/Chair Confirms PAD is Completed

When the candidate submits any section of the PAD, Step 1 will automatically be initiated with an email.

Unit administrators can access the case from the email, Faculty180 home screen, or by navigating to the “Cases” menu under the Faculty180 Reviews section. Use the search bar to search by candidate name, if needed. Navigate to the case by clicking on the faculty member’s name.
Unit administrators can choose “Read Case” to see all attached documentation from the candidate.

Documents can be viewed 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.”
Note: Unit Administrators will not see documents within the case unless the PAD section is submitted by the candidate. Candidates can submit sections prior to the deadline. Sections can easily be unlocked for the candidate as long as the deadline has not passed. Contact your College Coordinator or the Faculty Coordinator to request a section be unlocked. Requests to unlock a section after the deadline will require additional approvals.

When all PAD sections are completed and submitted, the Unit Administrator/Chair should navigate to the “Case Details” tab and complete the Reappointment Unit Admin Confirms PAD Completion form by clicking on “Fill Out Form.”

Complete the question to confirm PAD completion and click “Submit Form.”
Next, the unit administrator will send the case forward to Step 2. Click “Send Case” at the top of the screen and “Forward to.”

The unit administrator will be prompted to enter an email subject and click “Continue” to email the appropriate party in the next case step.
6. Step 2-4 – Committees and Unit Administrator Complete Recommendation Memo

The following guidance is applicable for steps 2 through 4. The same actions will be required of the committees and unit administrator in each of these steps.

When the Unit Administrator/Chair completes Step 1 of the case it will be forwarded to Step 2 and the Unit Tenure Committee will receive an email. Each time the case is forwarded, the reviewers in the next step will be notified by email.

Committee members/Unit Administrators can access the case from the email, 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.
Committee members/Unit Administrators can choose “Read Case” to see all attached documentation from the faculty member and recommendations made 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.”
Committee chairs/Unit Administrators 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.

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 complete the “Reappointment Committee Recommendation”

Answer the question and click “Submit Form.”
Then, forward the case by clicking on the “Send Case” button and choosing “Forward to.”

![Send Case Forward](image)

The committee manager/unit administrator will be prompted to enter an email subject and click “Continue” to email the appropriate party in the next case step.
7. Division Personnel Representatives Close Case

In the last step of the workflow, either after the Dean or Unit Administrator (for BSOM) complete their case step, the case will end with the Division Personnel representatives. An email will be sent notifying the individuals in the final case step.

Navigate to the case directly from the email or log in to Faculty 180 directly. Cases assigned to a reviewer will appear on their Home Screen.

*Note: You may have access to other cases in other workflow steps because of the security role you are assigned. If you utilize the “Cases” menu, make sure you are only editing, forwarding and closing cases that are in your queue. Cases in your queue will appear on your home screen.*
Choose “Read Case” to see all attached documentation from the candidate and reviewers.

This is the final case step, and all future reappointment steps, and document sharing will exist outside of Faculty180 Reviews. The entire packet, or individual packet components, can be downloaded by clicking on the Download button in the “Read Case” screen. Click “Download Packet” and you will have the option to choose some, or all, of the components to download to a PDF. Click “Return to Case” to exit this screen.
The Division/BSOM personnel representatives will close the case by clicking on the “Case Options” button and choosing “Close Case.”

Choose the appropriate “20XX-20XX Academic Year” status, then click “Save.”

Be mindful of the deadline for the next reviewer when extracting and sharing the documentation.