Instructions for Uploading Promotion & Tenure Casebooks 2022-2023 promotion cycle

Required technology

MS Word, Adobe Acrobat 10.0 Professional or higher, MS Excel, Dropbox Note: Unit should have a dedicated space on its server to store documents confidentially

Steps in the Process

Responsibility

Step 1: Preparation of files

- Create a unique PDF* file for each promotion casebook labeled with the faculty Unit member's last name/first name and includes:
 - Bookmark and label the different sections of the promotion casebook, including a page count for each section (please do not list the last page of each section). Additionally, include a last page bookmark, along with the last page number (last page - 100) of the casebook.
 - After the bookmark with the External Reviewers' credentials (see Attachment G in the guidelines), also bookmark each external review letter and include the reviewer's credentials/bio from Attachment G (place the bio in front of the review letter as a separate page). For example: Reviewer A bio and letter (# pages), Reviewer B bio and letter (# pages), etc.
 - Note: All pages in the promotion casebook are to be in portrait position.
 - \circ Note: A table of contents and a cover sheet for each section is not necessary.
- Create an Excel "metadata" file containing the following information for EACH Unit casebook:
 - o Last Name, First Name
 - Employee ID
 - o Track
 - o School/College/Unit
 - Department and/or Division
 - Current Title (including tenure status)
 - Promotion Title (including tenure status)
 - Joint/Additional Appointments (including tenure status)
 - \circ Dean(s)/Director(s)
 - Department Chairs
- Create a unique PDF file containing the Unit Criteria for each promotion track Unit (Instructional Tenure Track, Clinical Instructional Track, Research Professor Track).
- Create a unique PDF file of the signed Summary Memorandum from the Dean/Director Unit and any attachments.

Step 2: Upload files to Dropbox by February 8, 2023

- Upload the PDF casebook file(s) (both positive and negative mandatory tenure): Unit
 - Select the folder named "Your Unit Name" Promotions
 - Select the appropriate folder (Instructional/Clinical/Research)
 - \circ Place the PDF file(s) within the appropriate folder(s)
 - Upload the Excel "metadata" file
 - Upload the PDF Unit Criteria file
 - o Upload the signed PDF Summary Memorandum from the Dean/Director file

Step 3: Preliminary review of casebooks by Academic HR

٠	Email Academic HR (trendell@umich.edu) that the files are available and uploaded to	Unit
	Dropbox.	
•	Academic HR reviews the PDF casebooks for completeness:	Academic
	• If complete, update status sheet of promotion cases.	HR
	• If incomplete, Academic HR to notify the unit of missing information.	
	Unit is responsible for, re-uploading completed file(s)	
٠	Once all casebooks have been uploaded into Dropbox and reviewed, please email a list of	Academic
	names and EMPLIDs to Provost.Fac.Acad.Affairs.Admins@umich.edu certifying that the	HR
	electronic cases have been reviewed and are complete as of a certain date.	
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Step 4: Transfer of files from the Unit to Academic HR

• Upload signed Promotion Recommendations (Instructional Tenure Track only) by the Unit deadline of February 8, 2023 to Dropbox

If you have questions or need someone added to your unit's Dropbox folder, please contact: <u>Provost.Fac.Acad.Affairs.Admins@umich.edu</u>

If you have questions on how to use Dropbox, please contact the ITS Service Center or go to: <u>https://its.umich.edu/communication/collaboration/dropbox/training</u>