

Checklist for Promotion & Tenure Materials 2025-2026 promotion cycle

METADATA

- Each School, College, or Unit will have their own customized Metadata Template with dropdowns lists for consistent reporting.
- Do not download and make a copy unless you re-upload that same day. Please work directly within the web version of Excel when possible, as any master edits and updates to the 2026 spreadsheet will be made directly to that template version.
- Note that where the data has a dropdown list, you should choose from one of those options and not type (or copy/paste) over it.
- Check information for accuracy. Pay close attention to EmplID, Unique Name, and current and recommended titles.
 - The wrong EmplID will pull in data for the incorrect faculty member from the HRRIS system when we merge two data sources.
- Fill in required information for each candidate:
 - Employee ID (check to see that it matches the correct name)
 - UniqName
 - First Name (must match the name in the PR memo)
 - Last Name (must match the name in the PR memo)
 - Case Type (select from dropdown list)
 - Track (select from dropdown list)
 - School/College/Unit (pre-filled)
 - Department (and/or Division for LSA)
 - Joint/Additional Appointments (including tenure status if applicable)
 - Full Current Title(s) (including tenure status)
 - Recommended Rank
 - Recommended Tenure (if applicable)
 - First time with tenure, where applicable (Y/N)
 - Full Promotion Title(s) (including tenure status)
 - Dean(s)/Director(s) (e.g. J. Doe)
 - Department Chairs (e.g.. J. Doe)
- Update the Excel “metadata” file in your appropriate dropbox folder
- DRAFT METADATA Due October 1, 2025
- FINAL METADATA Due January 7, 2026

UNIT CRITERIA

- Unit criteria for each track (tenure, clinical, research) must be provided by all units and uploaded to the Dropbox folder

- Naming Convention: Unit Track Criteria 2025-26 (e.g. Dentistry Clinical Track Criteria 2025-26)
- Upload the PDF to the unit's Dropbox folder by January 7, 2026.

SUMMARY MEMORANDUM

- One summary memorandum from the dean/director to the provost listing all promotion recommendations for all three tracks (clinical, research, tenure).
 - Information to include: Name, Empl ID, Hire Date, all current appointments
- Naming Convention: Unit Summary Memo 2025-26 (e.g. Taubman Summary Memo 2025-26)
- A final signed PDF should be uploaded to your unit's Dropbox folder by January 7, 2026.

PROMOTION RECOMMENDATION

- The purpose of the promotion recommendation is to provide a high level overview of the casebook and should be kept to a minimum of three pages and a maximum of five pages.
- In the recent and significant publications section, please refrain from including footnotes, asterisks, etc. from the citations.
- The external reviewers should be listed chronologically (A, B, C...).

CASEBOOK FILE

- Create a unique bookmarked PDF file for each promotion case labeled with the faculty member's last name/first name - school/college
- All pages are to be in portrait position.
- A table of contents and a cover sheet for each section is not necessary.
- The sections to bookmark are as follows:
 - PR (if a tenure track promotion)
 - Dean's cover letter
 - Chairs letter (if applicable)
 - Promotion and Tenure Review Committee Report (if applicable)
 - Curriculum Vitae
 - Documentation of Teaching
 - Documentation of Research
 - Documentation of Service
 - Solicitation Letter
 - Credentials of External Reviewers
 - Individual External Reviewer Bios and Letter (Reviewer A bio and letter (# pages), Reviewer B bio and letter (# pages), etc.)

- Internal Review Letters (if applicable)
- Last Page - (enter number)

- Upload the PDF casebook file(s) (both positive and mandatory negative tenure):
 - Select the folder named "Your Unit Name" Promotions
 - Select the appropriate folder (Instructional/Clinical/Research)
 - Naming Convention: Last Name, First Name - School/College