

Promotion & Tenure Case Checklist

AY26–27 | Interfolio Dossier

Candidate Name	
School/College (CSU)	
Department/Unit	
Action	☐ Tenure ☐ Promotion ☐ New Hire ☐ Other:
Current Rank	
Proposed Rank	
Date Prepared	
Date Released to CSU	

Packet Contents Checklist (for

✓	Candidate Packet (Submitted by Candidate)	Notes / File Name(s)
☐	CV (Required)	
☐	Research/Creative Activity Statement	
☐	Citation Counts for Each Published Article Publication Journal Summary (Required; document 2 of 2; e.g., JIF, indexing, Q1–Q4, journal h-index, acceptance rate)	
☐	Record of Grant Activity (If applicable)	
☐	Research/Creative Work Appendices (Optional)	
☐	Teaching Statement (Required; separate document from Research Statement)	
☐	Teaching Appendices (Optional)	
☐	Service Activities Statement (Required)	
☐	Selection of Scholarship/Creative Work (Required; no fewer than 4 items; additional items allowed)	
✓	Internal Case Sections (Submitted by Department AP / Dean's Office / OFS)	Notes / File Name(s)
☐	Standards of the Unit (Department/Division P&T guidelines)	
☐	Original Appointment Letter (Salary redacted; CandidateLastName_Appointment Letter)	
☐	Third-Year Review Letter (Salary redacted; CandidateLastName_TYR Letter)	
☐	Annual Review Letters (CandidateLastName_YEAR_Review Letter)	
☐	Documentation of External Review Process (includes full list of suggested reviewers; indicates candidate vs. committee suggestions; timeline of outreach/communications)	
☐	Sample External Review Request Letter	
☐	External Reviewer Letters (LastName, F_External Review Letter)	
☐	External Reviewer CVs (LastName, F_External Review CV)	
☐	Teaching: Course List & Evaluations (Submitted by OFS: PeopleSoft course list; EvaluationKit evaluations)	OFS confirmed: ☐ Yes ☐ No

☐	Peer Evaluations (each evaluation as separate file; LastName, F._Peer Evaluation)	
☐	Student Letters: Process Summary + Sample Request Letter	
☐	Student Letters (each as separate file; LastName, F._Student Letter)	
☐	Department P&T Committee Recommendation (individual letters or one signed letter; LastName, F._Internal Letter)	
☐	Department/Unit Chair Recommendation (if applicable; LastName, F._Internal Letter)	
☐	CSU P&T Committee Recommendation (individual letters or one signed letter; LastName, F._Internal Letter)	
☐	Dean's Recommendation (LastName, F._Internal Letter) – Due by January 5, 2027	

Confidentiality/Access Notes: Internal letters are confidential. Once the department releases the case to the CSU review committee, the candidate cannot edit/add materials without permission from the Office of Faculty Success.