

# Case Review Steps

These steps are already set up in all Interfolio cases.

*\*You MAY need to adjust committee members within individual cases.*

## 1. Department Preliminary (Administrative Professional)

The department administrative professional is responsible for uploading the following initial materials:

- Standards of the Unit
- Initial Appointment Letter (salary redacted)
- Third-Year Review Letter (salary redacted)
- Annual Reviews
- Documentation of External Review Process
- External Reviewer Letters
- External Reviewer CV's
- Peer Evaluations of Teaching
- Summary of Process of Gathering Student Letters
- Student Letters

## 2. Department P&T Committee (Faculty and/or assigned review committee)

- Department P&T Committee will review the case via Interfolio.
- Department/Unit Chair will schedule meeting to vote on recommendations for promotion.
- Department P&T Committee and/or Unit Chair will submit *\*either\** individual letters of recommendation *\*or\** a single letter signed by all committee members to the Administrative Professional for uploading.

## 3. Department Final (Administrative Professional)

The department administrative professional will upload the following material at this step:

- Recommendation of Department/Unit Chair (if applicable)
- Recommendation of Department P&T Review Committee (if applicable)

## 4. Dean's Office Review (Dean's Executive Administrative Professional)

The Dean's Office Executive Administrative Professional will review all materials in the case for any missing materials and/or necessary corrections prior to being sent to the CSU P&T Review Committee.

## 5. College/School P&T Committee (CSU)

- CSU P&T Committee will review case via Interfolio.
- CSU Chair will schedule a meeting to vote on promotion
- Committee will submit *\*either\** individual letters of recommendation *\*or\** a single letter with committee signatures to the Dean's executive administrative professional for uploading.

# Case Review Steps (continued)

## 6. Dean's Office Final Review

The Dean's Office Executive Administrative Professional will upload letters of recommendation from the CSU P&T Review Committee (if applicable).

- Please use this naming convention:
  - LastName, F\_Internal Letter
- Dean's Office EAP will send the case forward to the Dean of School for final review.

## 7. Dean of School Final Review

The Dean of College/School will upload their final letter of recommendation, by January 5, 2027.

## 8. CSU Notifies OFS for Final Review

When all required materials have been uploaded, the CSU designated administrative professional will contact Mandy Graham ([mtgraham@smu.edu](mailto:mtgraham@smu.edu)) for moving forward to the review stage of the process.

## Digital Binder Requirements

**The following items will be downloaded from the Interfolio case and included in the Provost P&T Advisory Committee Digital Binder.**

(Details/processes are subject to change and will be finalized by December 31, 2026.)

### Standards of the Unit

- Department/Division Guidelines for Promotion & Tenure

### Internal Review

- Recommendation of Department/Unit Level (if applicable)
- Recommendation of CSU P&T Review Committee (if applicable)
- Recommendation of the Dean

### External Reviews

- Documentation of External Review Process – including list of solicited reviewers
- External Letters

### Candidate CV

- CV

### Research/Creative Activity Dossier

- Research/Creative Activity Statement

### Teaching Activity Dossier

- Teaching Statement

### Service Activities

- Service Activities Statement