

Directions (Quick Start)

Who uses this (and what to do)

Role	Primary responsibilities in this packet
Candidate	Uploads required candidate materials (CV; Research/Creative Activity Statement; Teaching Statement; Service Activities Statement; Citation and Journal Publication Summary; scholarship/creative work files). Confirms Research and Teaching statements are separate documents. (For promotion in AY26-27, one document which includes research/creative activity and teaching is permitted.)
Department AP	Builds the internal case record: unit standards; redacted appointment/TYR/annual review letters; external review documentation; external letters + CVs; peer evaluations; student letter process summary + student letters; uploads department-level committee and chair letters at the appropriate review step.
Department Chair / Committee Chair	Coordinates department-level review and vote; provides either individual letters or a single signed committee letter for upload.
Dean's Office EAP	Completeness check before CSU review; uploads CSU committee letter(s) and routes the case to the Dean; ensures naming conventions are followed for internal letters.
CSU Chair / CSU Committee	Reviews the case, coordinates vote and provides either individual letters or a single signed committee letter for upload.
Office of Faculty Success (OFS)	Provides institutional teaching records (PeopleSoft course list; EvaluationKit evaluations). Assists with Interfolio access/formatting issues and controls re-opening a case for candidate edits after release.

Quick-start workflow (recommended order)

1. **Start with the Cover Sheet.** Fill in case metadata and use the checklists to track completion.
2. **Candidate uploads candidate materials.** Candidate should complete uploads early enough for committee review – following CSU deadlines.
3. **Department AP uploads internal case materials (Department Preliminary step).** Include unit standards, redacted formal letters, external review documentation, and teaching support materials (peer/student letters). Note: Coordinating/requesting external reviewer letters is the responsibility of the committee.
4. **Department committee review and vote.** Chair schedules vote; letter(s) are provided to the AP for uploading.
5. **Department Final step.** AP uploads department chair and/or department committee recommendation(s) (if applicable).
6. **Dean's Office Review.** Dean's Office EAP checks completeness and routes to CSU committee.
7. **CSU committee review and vote.** CSU letter(s) provided to Dean's Office EAP for uploading.
8. **Dean's final review.** Dean uploads final recommendation letter.
9. **CSU notifies OFS for final review.** CSU designated AP contacts OFS to move the case forward.

Key reminders

- **Confidentiality:** Internal letters are confidential and should be stored/uploaded according to CSU guidance.
- **Naming conventions matter:** Use the file naming conventions shown in this packet (especially for internal letters, external letters/CVs, peer evaluations, and student letters).
- **Edit lock after release:** Once the department releases the case to the CSU review committee, the candidate cannot edit/add materials without OFS permission.