

# Faculty Promotion and Tenure Portal

Fall 2024

# Personnel Dossier Submission Guidelines

- Personnel Case information and all forms can be found on the Provost's website under the "Personnel Cases" tab: <https://www.binghamton.edu/academics/provost/faculty-resources/index.html>
- For each case, **the original paper version** should be submitted to your dean's office, in addition to uploading the case into the new Faculty Promotion and Tenure Portal
  - Larger files such as publications, manuscripts, and student work examples should still be submitted via flash drive

# Electronic Files

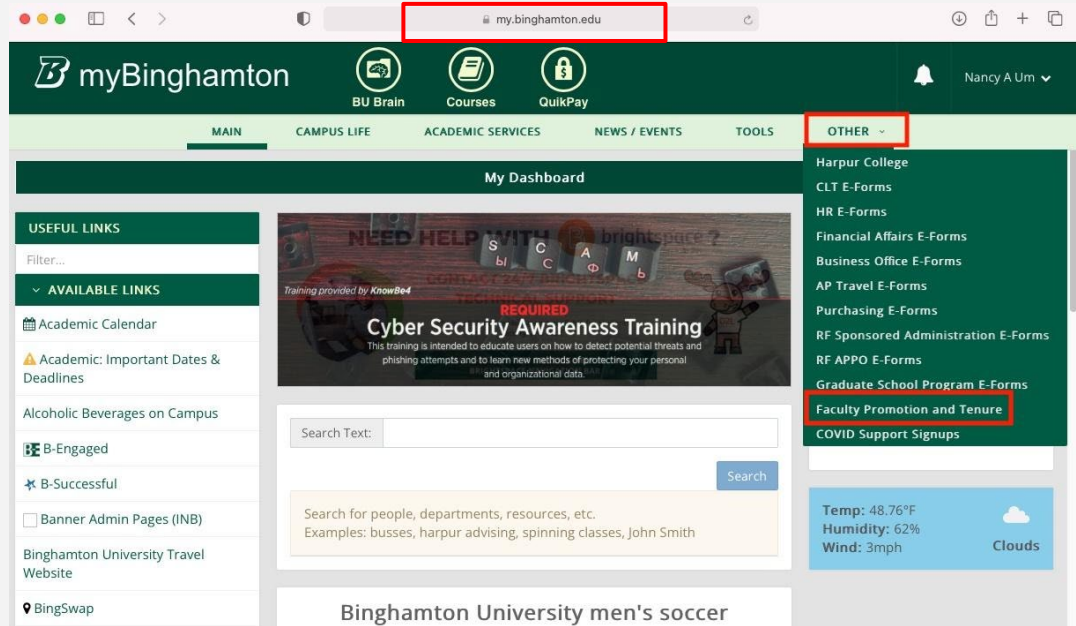
- Departments and Dean's Offices should maintain electronic files for every case
- The electronic copy should mirror the physical copy, except that the section checklist should not be included in the upload to the portal
- The Personnel Action Summary page does not need to be included in the portal, as the information is uploaded into the portal within the case
- You can download the complete package through the portal

# Case Setup

- Laura Kipfer will reach out to the Dean's Assistant to confirm which cases are coming up for review. This information will include:
  - Name
  - Present Title
  - Date Present Appointment Expires
  - Personnel Action: Renewal or Tenure
  - Is this case mandated? Yes or No
- Upon receipt of this information, the case will be created in the portal and the Dean's Assistant's will receive an email that they have received "Admin" access
- The Dean's Assistant will then give "Admin" access to those will be adding users, recording votes, uploading files, etc; "Write" access to those who will be uploading files only; "Read" access to those who will only review the files

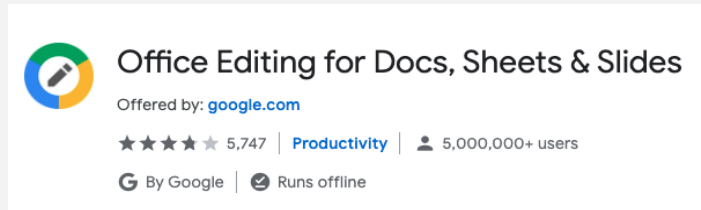
# Electronic Portal Access

- The portal is only visible to those who have been granted access
- If you do not see the “Faculty Promotion and Tenure” option under the “Other” tab in myBinghamton, contact your Dean’s office or Laura Kipfer, 7-2 154



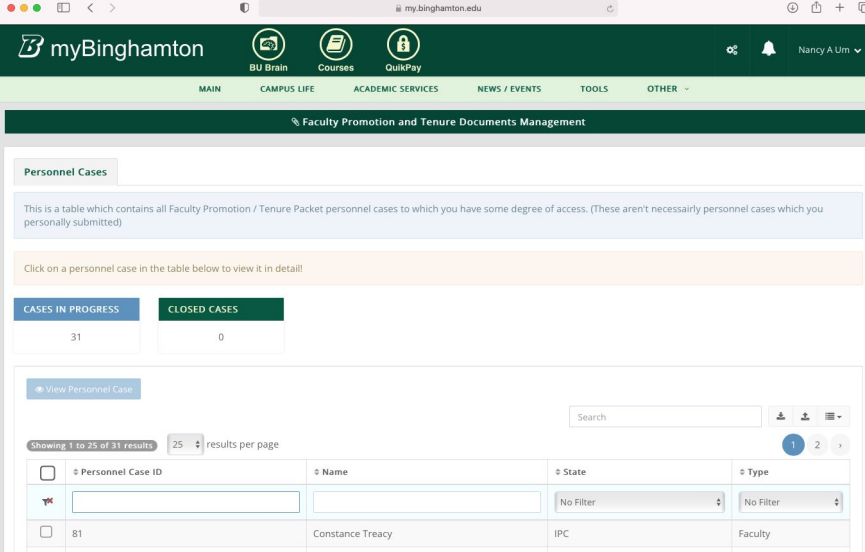
# Technical Specifications

- If possible, use Google Chrome. You may use another browser, such as Safari or Firefox, but the “Preview” function will be limited and you may encounter bugs.
- If you use Google Chrome, you may be prompted to add the “Office Editing for Docs, Sheets & Slides” extension, which will improve the functionality of the Preview function, especially for .doc and .docx files



# Case Access

- After entering the portal, you should be able to see the cases that you are working on
- If you do not see any cases or some are missing, then please contact your Dean's office or Laura Kipfer, 7-2154
- Each administrator and IPC member must be given access to each case
- Open a case by selecting the appropriate checkbox and clicking the blue "View Personnel Case" button
- You can also simply click on the entry and the case will open
- Only one case can be opened at a time



The screenshot shows the myBinghamton portal interface for Faculty Promotion and Tenure Documents Management. The page title is "Personnel Cases" and it contains a table of cases. The table has columns for "Personnel Case ID", "Name", "State", and "Type". A search bar is located above the table, and there are pagination controls showing "Showing 1 to 25 of 31 results" and "25 results per page". The table contains one visible row with Case ID 81, Name Constance Treacy, State IPC, and Type Faculty.

Personnel Case ID	Name	State	Type
81	Constance Treacy	IPC	Faculty

# Manage Permissions

- Dean's Assistants will be given "Admin" access
- They should then grant permission for appropriate parties to either "Admin", "Write", or "Read" access
- Click on "Manage Permissions" in the upper right hand corner
- Please contact Laura Kipfer if you are unsure what permission to assign

Personnel Cases View Personnel Case 81

SAMPLE CASE PERSONNEL CASE INFO 81 / FACULTY / CLOSED

Manage Permissions

Binghamton University Faculty Perso Permissions

Edit This Info Print Summary

Please click on + to add more privileges

+ User

Trisha Gana

Role

- Admin
- Admin
- Read
- Write



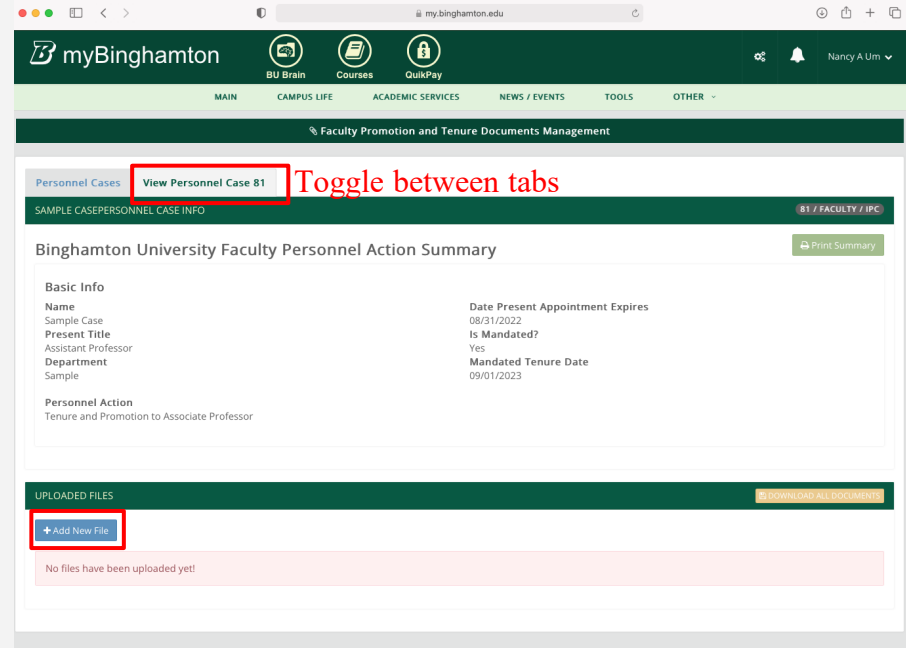
# Manage Permissions Continued

- An example flow:
  - Dean's assistant is assigned "Admin" access by Laura Kipfer
  - Dean's assistant then assigns Department Assistant as "Admin"
  - Department Assistant then assigns the IPC Chair as "Write" if they will be uploading documents; IPC members and Department Chair as "Read"

The screenshot shows a web interface for managing permissions. At the top, there are tabs for "Personnel Cases" and "View Personnel Case 81". Below this is a dark green header with "SAMPLE CASEPERSONNEL CASE INFO" and "81 / FACULTY / CLOSED". The main content area is titled "Binghamton University Faculty | Permissions" and includes buttons for "Edit This Info" and "Print Summary". A "Manage Permissions" button is highlighted with a red box. Below this, a form allows adding privileges. A user named "Trisha Gana" is selected, and a dropdown menu for "Role" is open, showing "Admin", "Read", and "Write" options. A red arrow points from the "Manage Permissions" button to the "Admin" role option in the dropdown.

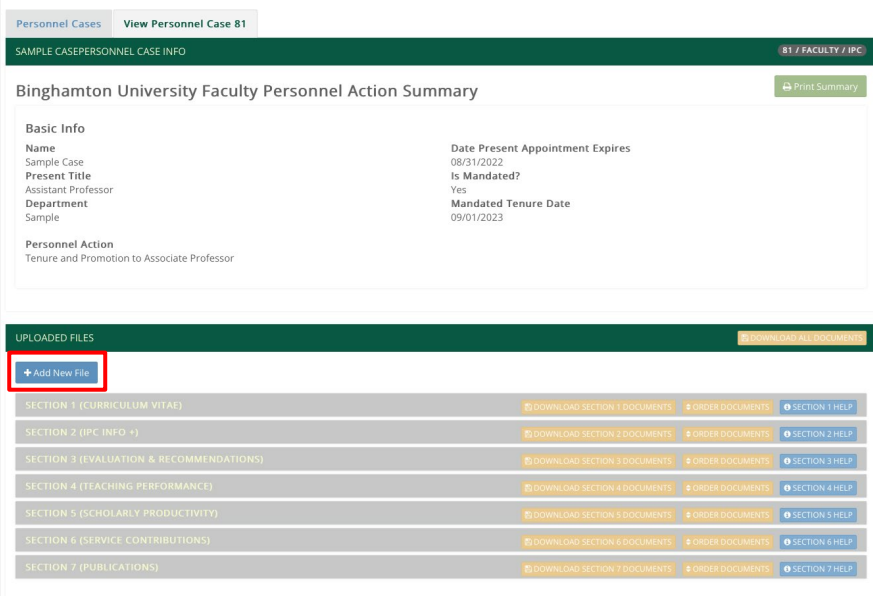
# Case Tab

- You may toggle between the “Personnel Cases” tab and the specific case
- **ALWAYS** refresh your browser after viewing one case and moving on to another
- Begin uploading documents using the “Add New File” button



# Sections Appear

- After you add your first file, the seven sections will automatically populate
- Continue using the “Add New File” function to fill out the sections
- Please see ‘Personnel Portal How-To Guide’ under [Faculty Resources](#) for more detailed information



The screenshot displays the 'View Personnel Case 81' interface. At the top, there are tabs for 'Personnel Cases' and 'View Personnel Case 81'. Below this is a header for 'SAMPLE CASE PERSONNEL CASE INFO' with a breadcrumb '81 / FACULTY / IPC' and a 'Print Summary' button. The main content is titled 'Binghamton University Faculty Personnel Action Summary'. It is divided into two columns: 'Basic Info' and 'Personnel Action'. The 'Basic Info' column includes fields for Name (Sample Case), Present Title (Assistant Professor), Department (Sample), Date Present Appointment Expires (08/31/2022), Is Mandated? (Yes), and Mandated Tenure Date (09/01/2023). The 'Personnel Action' column shows 'Tenure and Promotion to Associate Professor'. Below the summary is an 'UPLOADED FILES' section with a '+ Add New File' button highlighted by a red box. At the bottom, there is a table of seven sections, each with 'DOWNLOAD SECTION X DOCUMENTS', 'ORDER DOCUMENTS', and 'SECTION X HELP' buttons.

Section	Download Section Documents	Order Documents	Section Help
SECTION 1 (CURRICULUM VITAE)	DOWNLOAD SECTION 1 DOCUMENTS	ORDER DOCUMENTS	SECTION 1 HELP
SECTION 2 (IPC INFO +)	DOWNLOAD SECTION 2 DOCUMENTS	ORDER DOCUMENTS	SECTION 2 HELP
SECTION 3 (EVALUATION & RECOMMENDATIONS)	DOWNLOAD SECTION 3 DOCUMENTS	ORDER DOCUMENTS	SECTION 3 HELP
SECTION 4 (TEACHING PERFORMANCE)	DOWNLOAD SECTION 4 DOCUMENTS	ORDER DOCUMENTS	SECTION 4 HELP
SECTION 5 (SCHOLARLY PRODUCTIVITY)	DOWNLOAD SECTION 5 DOCUMENTS	ORDER DOCUMENTS	SECTION 5 HELP
SECTION 6 (SERVICE CONTRIBUTIONS)	DOWNLOAD SECTION 6 DOCUMENTS	ORDER DOCUMENTS	SECTION 6 HELP
SECTION 7 (PUBLICATIONS)	DOWNLOAD SECTION 7 DOCUMENTS	ORDER DOCUMENTS	SECTION 7 HELP

# Adding New Files

- For each new file, you must select the “Section” and “Type”
- There is no need to upload the Section Cover Pages
- The required contents for each section can be found under the blue button “Section # Help”
- Please see ‘Personnel Portal How-To Guide’ under [Faculty Resources](#) for more detailed information

The screenshot shows the 'File Upload' interface. At the top, there is a 'Case ID\*' field with the value 'B1'. Below it, there are two dropdown menus: 'Section\*' and 'Type\*'. The 'Section\*' dropdown is currently set to 'Section 1 (Curriculum Vitae)' and the 'Type\*' dropdown is set to 'Candidate CV'. Both dropdown menus are highlighted with red boxes. Below these fields, there is a toggle switch for 'Is the file size greater than 48MB?' with 'No' selected. Underneath is an 'Upload File' section with a dashed box for dropping files and an 'Upload' button. At the bottom, there are two panels showing the available options for the dropdown menus. The left panel shows the 'Section\*' dropdown options, with 'Section 1 (Curriculum Vitae)' selected. The right panel shows the 'Type\*' dropdown options, with 'Candidate CV' selected.

File Upload

Case ID\* B1

Section\* Section 1 (Curriculum Vitae)

Type\* Candidate CV

Is the file size greater than 48MB?  
No  Yes

Upload File

Drop files here to upload

Upload

Section\*

- ✓ Section 1 (Curriculum Vitae)
- Section 2 (IPC Info +)
- Section 3 (Evaluation & Recommendations)
- Section 4 (Teaching Performance)
- Section 5 (Scholarly Productivity)
- Section 6 (Service Contributions)
- Section 7 (Publications)

Type\*

- Form 1 (Initiating Personnel Committee)
- Form 2 (SOOTs)
- Form 3 (Release Form)
- Form 4 (teaching performance, scholarly productivity, or service contributions)
- Form 5 (Letter)
- Form 6 (STATEMENT OF PERSONAL SERVICE)
- Form 7 (Student Advisory Committee)
- ✓ Candidate CV
- Evaluation and Recommendation
- IPC Report
- Memo
- Petition to IPC
- Recommendation
- Scholarly Productivity
- Service Contributions
- Teaching Performance
- Third Year Renew Letter
- Other

# Reordering Documents

- Files will be automatically listed in the order that they were uploaded
- After all docs are uploaded, use the yellow “Order Documents” button to move them according to the order in ‘Personnel Portal How-To Guide’
- Don’t forget to save

The screenshot shows the 'Personnel Cases' interface for 'View Personnel Case 81'. The page title is 'Binghamton University Faculty Personnel Action Summary'. It includes a 'Print Summary' button and a 'Basic Info' section with details like Name, Present Title, Department, and Personnel Action. Below this is the 'UPLOADED FILES' section, which lists seven sections (1-7) with corresponding 'DOWNLOAD SECTION X DOCUMENTS', 'ORDER DOCUMENTS', and 'SECTION X HELP' buttons. The 'ORDER DOCUMENTS' button for Section 5 is highlighted with a red box, and a red arrow points to it from the text 'Anchor and drag the files into the correct order'. At the bottom, there is a 'Sort Documents' section with a list of files and 'Cancel' and 'Save' buttons.

Personnel Cases View Personnel Case 81

SAMPLE CASEPERSONNEL CASE INFO 81 / FACULTY / IPC

Binghamton University Faculty Personnel Action Summary Print Summary

**Basic Info**

Name  
Sample Case  
Present Title  
Assistant Professor  
Department  
Sample  
Personnel Action  
Tenure and Promotion to Associate Professor

Date Present Appointment Expires  
08/31/2022  
Is Mandated?  
Yes  
Mandated Tenure Date  
09/01/2023

UPLOADED FILES DOWNLOAD ALL DOCUMENTS

+ Add New File

SECTION 1 (CURRICULUM VITAE)	DOWNLOAD SECTION 1 DOCUMENTS	ORDER DOCUMENTS	SECTION 1 HELP
SECTION 2 (IPC INFO +)	DOWNLOAD SECTION 2 DOCUMENTS	ORDER DOCUMENTS	SECTION 2 HELP
SECTION 3 (EVALUATION & RECOMMENDATIONS)	DOWNLOAD SECTION 3 DOCUMENTS	ORDER DOCUMENTS	SECTION 3 HELP
SECTION 4 (TEACHING PERFORMANCE)	DOWNLOAD SECTION 4 DOCUMENTS	ORDER DOCUMENTS	SECTION 4 HELP
SECTION 5 (SCHOLARLY PRODUCTIVITY)	DOWNLOAD SECTION 5 DOCUMENTS	ORDER DOCUMENTS	SECTION 5 HELP
SECTION 6 (SERVICE CONTRIBUTIONS)	DOWNLOAD SECTION 6 DOCUMENTS	ORDER DOCUMENTS	SECTION 6 HELP
SECTION 7 (PUBLICATIONS)	DOWNLOAD SECTION 7 DOCUMENTS	ORDER DOCUMENTS	SECTION 7 HELP

Sort Documents

- Elkins\_Survey
- Elkins\_TradeCoins

Cancel Save

Anchor and drag the files into the correct order

# Preview or Update Files

- When you want to view a document, click on “Preview”, and a new tab will be created for the document viewer
- Simply click back on to the “View Personnel Case XX” tab to return to the package after viewing the file
- Files may also be downloaded, updated, or deleted

The screenshot displays a web interface for managing documents. At the top, there is a header for "SECTION 1 (CURRICULUM VITAE)" with navigation links for "DOWNLOAD SECTION 1 DOCUMENTS", "ORDER DOCUMENTS", and "SECTION 1 HELP". Below this, a document titled "CY-SampleCase" (Candidate CV) is shown with a "Delete File" button and an "Updated at: 2021-11-12 08:59:51" timestamp. A red box highlights the "Preview", "Download", and "Update" buttons. A red arrow points from the "Preview" button to a "Preview File" button in a secondary tab area below, which also contains "Personnel Cases" and "View Personnel Case 81" tabs.

# Recording Voting

- Click on “Edit This Info” in the upper right corner
- Click “Record Votes” in the lower left corner and a new section will populate
- Click the + sign to add additional voting
- You must vote separately for Promotion and Tenure cases
- The “Tally of All Eligible Members” should equal the total number in the remaining boxes

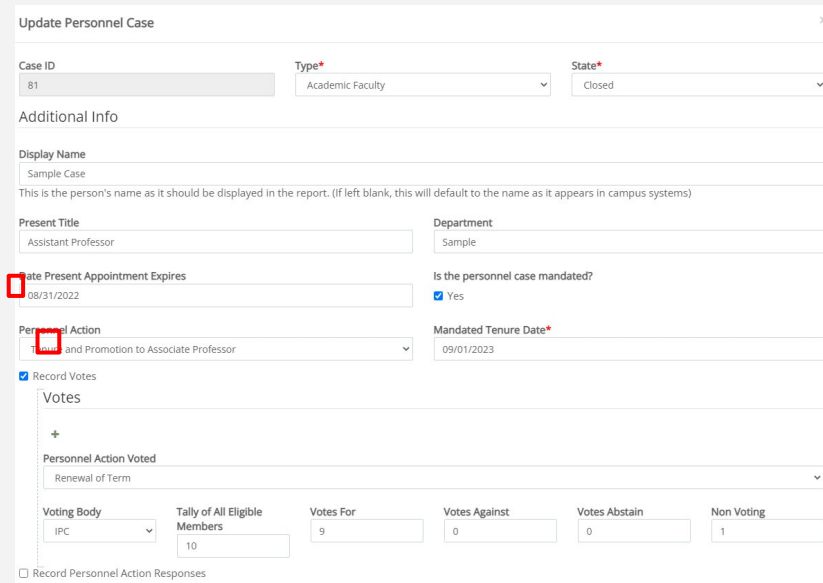


Personnel Cases View Personnel Case 81

SAMPLE CASE PERSONNEL CASE INFO 81 / FACULTY / CLOSED

Binghamton University Faculty Personnel Action Summary

Edit This Info Print Summary



Update Personnel Case

Case ID: 81 Type: Academic Faculty State: Closed

Additional Info

Display Name: Sample Case

This is the person's name as it should be displayed in the report. (if left blank, this will default to the name as it appears in campus systems)

Present Title: Assistant Professor Department: Sample

Date Present Appointment Expires: 08/31/2022

Is the personnel case mandated?  Yes

Personnel Action: Promotion and Promotion to Associate Professor Mandated Tenure Date: 09/01/2023

Record Votes

Votes

+ Personnel Action Voted: Renewal of Term

Voting Body	Tally of All Eligible Members	Votes For	Votes Against	Votes Abstain	Non Voting
IPC	10	9	0	0	1

Record Personnel Action Responses

# Recording Personnel Action Responses

- Click “Record Personnel Action Responses” below “Record Votes” and a new section will populate
- Click the + sign to add additional responses
- You must enter separately for Promotion and Tenure cases
- Enter the date the decision was made for each responding party, not the day you are entering the information

The screenshot shows a web form with the following fields and options:

- Date Present Appointment Expires:** 08/31/2023
- Is the personnel case mandated?**  Yes
- Personnel Action:** Tenure and Promotion to Associate Professor
- Mandated Tenure Date\*:** 09/01/2027
- Record Votes
- Record Personnel Action Responses
- Personnel Action:** A list with a minus sign and a plus sign (+) in a red box, indicating an add button.
- Personnel Action Voted:** Renewal of Term
- Responding Body:** IPC
- Response:** N/A



# Important Notes

- Please do not upload all of the publications in a single PDF of several hundred pages.
- Please notify the Dean's Assistant that the electronic version is complete and deliver the original paper copy and flash drive (if applicable) to your Dean's Office
- All departments/dean's offices must keep their own electronic copy of the case
- Once the case has moved on to the Provost's Office, you will no longer have access to view the case on the portal

# Last Thoughts

- If you have questions, please email or call Laura Kipfer in the Provost office, [lkipfer1@binghamton.edu](mailto:lkipfer1@binghamton.edu), 7-2 154
- More training resources can be found on the Provost website, under “Faculty Resources”, “Personnel Cases”:  
<https://www.binghamton.edu/academics/provost/faculty-resources/>

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