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 <u>original</u> 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, 7-2154

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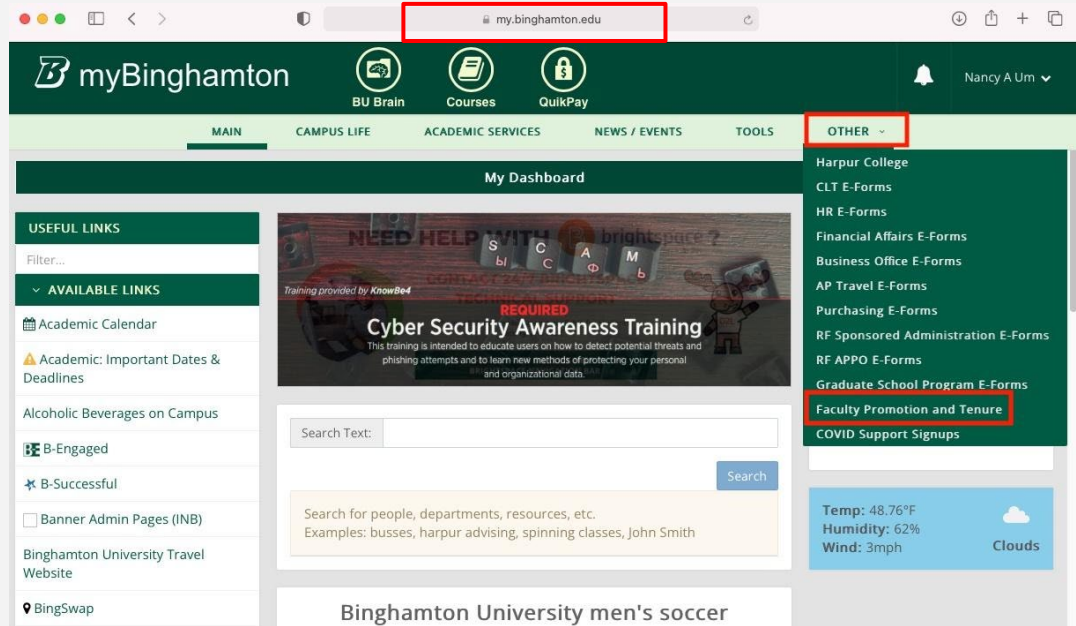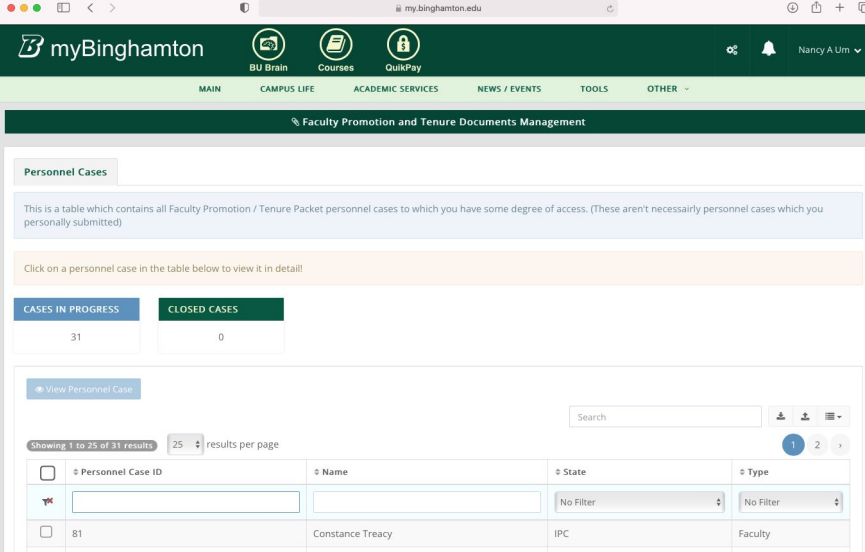
Technical Specifications

- 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
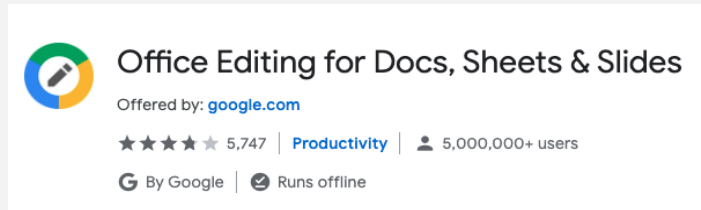
Case Access

- 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

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

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"

Case Tab

- You may toggle between the "Personnel Cases" tab and the specific case
- <u>ALWAYS</u> refresh your browser after viewing one case and moving on to another
- Begin uploading documents using the "Add New File" button
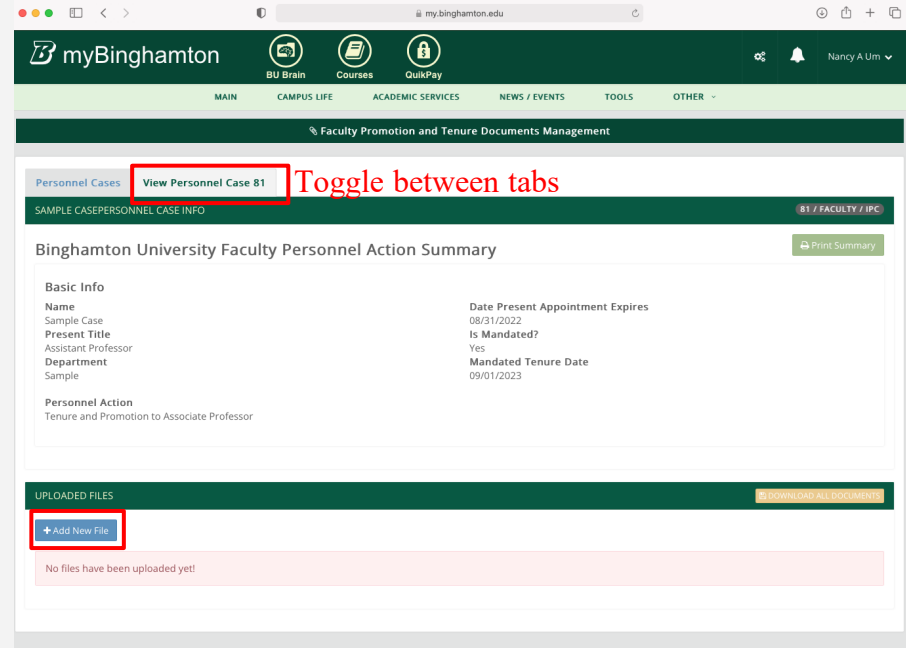
Sections Appear

- 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

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

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

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

SECTION 1 (CURRICULUM VITAE)   DOWNLOAD SECTION 1 DOCUMENTS   ORDER DOCUMENTS   SECTION 1 HELP

Preview   Download   Update   CY-SampleCase   Candidate CV   Delete File   Updated at: 2021-11-12 08:59:51

Personnel Cases   View Personnel Case 81   Preview File

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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
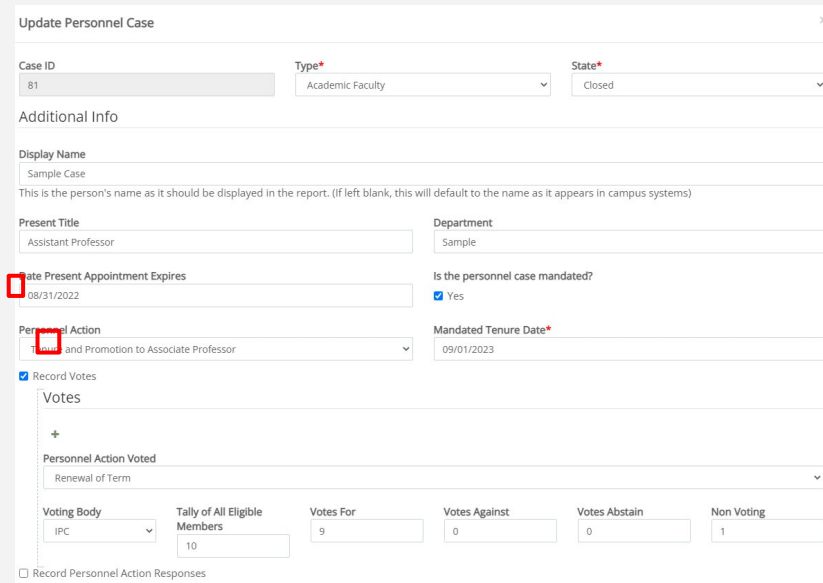
Recording Personnel Action Responses

- 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

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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, 7-2154

- 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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