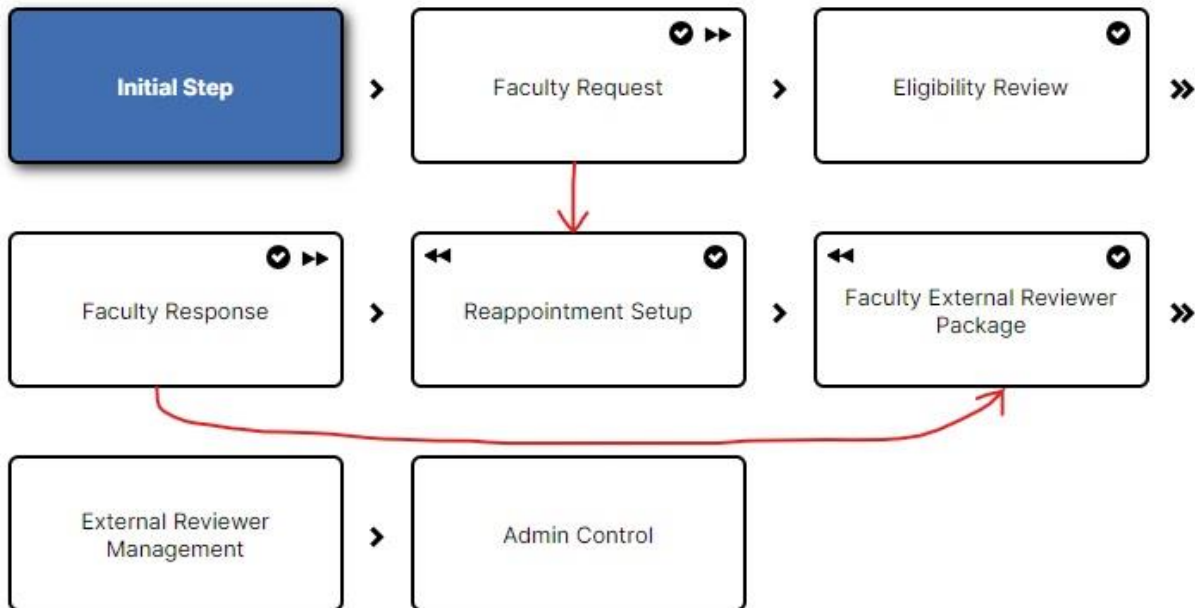


Overview of TPR Pre-Check with External Reviewers

This guide provides information to TPR Chairs and Department Chairs/School Directors on how to work within Faculty Success to manage and request reviews from external reviewers. Screenshots are included to demonstrate what can be seen at each step.

In the diagram below, red arrows connect linked steps showing potential process fast-forwards.



Initial Step (Autoadvances)

External reviewers should not see the initial step from the candidate requesting promotion, so we included a blank step at the beginning of all processes.

Initial Step - No information is needed at this step. The form will auto-advance after March 31.


Comments



CANCEL

Actions



 Save Draft

 Submit to Faculty Request

Faculty Request

Candidates for promotion submit their letter and draft CV at this step. TPR Chairs or Department Chairs/School Directors will use this information at a later workflow step for their tenure-line promotions to contact external reviewers and ask them if they are willing to review the candidates. The table below lists the information needed by type of promotion.

Type of Promotion Requested	Information Needed
<ul style="list-style-type: none"> Tenure-track faculty requesting promotion to associate professor with tenure Associate professors requesting tenure review. 	<ul style="list-style-type: none"> Date hired as full-time tenure-track faculty Details related to tenure-clock extensions Tenure credit at hire (if any) Penultimate Year
Associate professors requesting promotion to professor	<ul style="list-style-type: none"> Date hired into tenure-eligible position Date promoted to associate professor Date of tenure

Candidates answer questions regarding:

- Promotion and Hire Dates
- Promotion rank requested and tenure dates if applicable
- Information regarding conflicts of interest

Candidates also upload the files designated below and follow submission instructions as indicated.

How to SUBMIT

Once you have completed the required fields (marked with an asterisk), go up to the top and click the action button. You will see:

[Request Eligibility Review](#) – Choose this if you are requesting promotion.

[Request Reappointment Setup](#) – Choose this if you are requesting reappointment. Reappointment processes do not need to be submitted to the department chair. If you are requesting reappointment, you do not need to upload a vita or letter.

[No Process Needed](#) – If you are **not requesting promotion and do not need reappointment**, choose no process needed. This closes the process completely and it cannot be reopened. (Primarily for associate professors not requesting promotion to professor)

Letter Requesting Promotion or Reappointment

[Drop files here or click to upload](#)

Draft Vita

[Drop files here or click to upload](#)

Proposed List of External Reviewers (At least 6) (Required for Promotions to Assoc Prof and Prof)

[Drop files here or click to upload](#)

Eligibility Review Step

Once faculty members submit their letters and CVs to Department Chairs/School Directors or TPR Chairs declaring intent for promotion, the Eligibility Review Step begins. In this step, either the Department Chair/School Director or TPR Chair determines eligibility for the promotion. The reviewer is set for each department based on information provided to DMAdmin earlier in the academic year. If the setting is incorrect, email DMAdmin@clemsun.edu and request a change.

The reviewer will determine candidate eligibility through review of time in service, as well as submission completeness and accuracy. Documents required for promotion may vary by department. If expected documents are not included, please choose the send back option.

Send Back: If you choose this option, a dialog window will pop up allowing you to explain what is missing and assign a new deadline. Please keep a record of what was requested as this window will not remain part of the record.

If the file is complete, answer required questions and choose one of the following options under Actions:

Submit to Faculty Response: Choose this option for:

- Reappointment Process
- Promotion request where the individual did not meet eligibility requirements.

Process not Needed: If a faculty member did not request a promotion and does not need a reappointment, choose this option. For example, this would apply to associate professors not requesting promotion.

Ensure any potential conflicts are noted under Potential Conflicts as it helps with the identification of familial or spousal relationships where alternate committees or alternate chair structures are required.

These fields will appear as such:

Tenure and Promotion Eligibility *

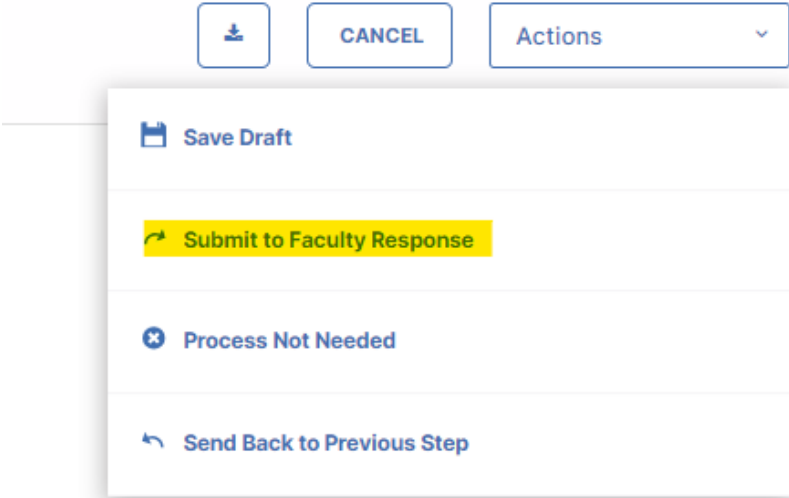
Reappointment Status

Please indicate any potential conflicts of interest with this faculty member in the comment box below. This includes familial or spousal relationships within the department, on the committee, or with the Dean's Office.

Potential Conflicts in Department

Add comments if any additional explanations are needed. (Optional)

Once the reviewer selects the options in the dropdown items, choose **Submit to Faculty Response**.



Faculty Response Step

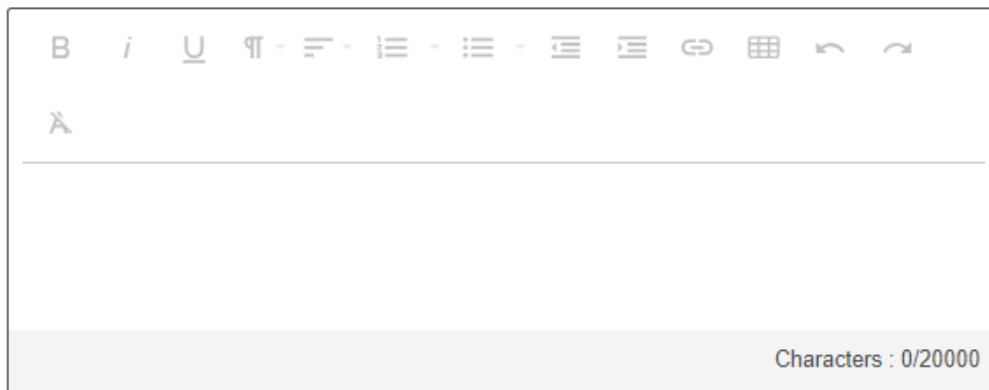
At this step, faculty can view the selections made by the Department Chair/School Director or TPR Chair in the previous step. If the faculty member has been approved for promotion, they should select **Advance to Faculty External Reviewer Package** in **Actions**.

Faculty Response -

This step enables the faculty to see the reviewer's selections. Faculty approved for promotion should choose the option [Advance to Faculty External Reviewer Package](#).

After five days, the process will automatically advance to Reappointment Setup for those who did not forward for promotion. (Faculty can also choose the action [Request Reappointment Setup](#))

Comments



Characters : 0/20000

Faculty External Reviewer Package Step

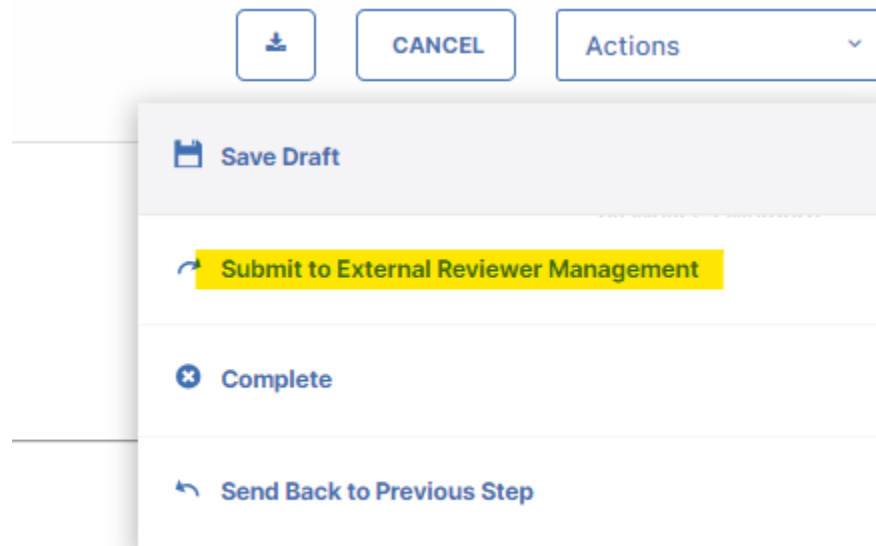
If the department chooses to use the links method for external reviewers, this is the step where the Department Chair/School Director or TPR Chair will load the faculty documents that will be provided to the external reviewers. TPR Guidelines can also be loaded here if the department chooses. Once the documents are loaded, choose the option submit to External Reviewer Management (highlighted below).

This Committee's Response

Documents for External Reviewers - Please load documents below*

[Drop files here or click to upload](#)

Once this is complete, select **Submit to External Reviewer Management** in **Actions**.



Departments may continue with the traditional practice of managing external reviewer requests outside of Faculty Success. If that option is preferred, choose the **COMPLETE** option to end the process here.

External Reviewer Management Step

This is the step where reviewers are managed in Faculty Success. If the link method is used, the department will designate a person to manage those links and send the email requests. This can be either the TPR chair or the Department Chair/School Director.

The external reviewer manager (either the TPR Chair or Department Chair/School Director) will use the **ADD REVIEWER** button to add external reviewers. The external reviewer manager is responsible for manually adding the selected name proposed by the candidate, as well as their own chosen names appropriate for the review.

▼ **Aggregated External Reviewers**

Approve or Skip each external reviewer to determine which individuals appear in the External Reviewers Responses section below. Approving a reviewer will also generate a unique link that will provide the reviewer with access to the candidate's materials and a place to supply their review. This link should be sent via email.

ADD REVIEWER

▼ **External Reviewer Responses - Melissa Welborn** 0/0 Responses Received

Below are your approved external reviewers. You can send them an invitation to provide a review by copying the URL shown in their row and pasting it into an email. Their review status will update to Accepted/Declined once they have responded to the invitation. Upon submitting their review, their status will change to Response Received. Expire their review link if you would like to prevent them from submitting a review and would instead prefer a review from a different individual.

BY REVIEWER BY RESPONSE

Vita of External Reviewer

[Drop files here or click to upload](#)

Recommendation Letter

[Drop files here or click to upload](#)

Upon pressing the **Add Reviewer** button, the external reviewer manager is presented with the following form to fill. Once complete, they should select the **Add & Approve** button to add the reviewer to the list.

▼ **Aggregated External Reviewers**

Approve or Skip each external reviewer to determine which individuals appear in the External Reviewers Responses section below. Approving a reviewer will also generate a unique link that will provide the reviewer with access to the candidate's materials and a place to supply their review. This link should be sent via email.

Full Name *	University/Institution	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>
Rank	Email *	Phone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Comments		
<input style="width: 100%; height: 40px;" type="text"/>		

Requesting a Review

Faculty Success will generate a link that external reviewers can use to access a system that allows them to accept the invitation to complete a review and then upload letter and CV materials to complete the process.

To generate the link that the external reviewer manager will email directly to the reviewers in a separate email message, click **Actions**, and **Open Details**.

BY REVIEWER	BY RESPONSE
> Greta Williams	Awaiting Response
> Jane Doe	Awaiting Response
> John	Awaiting Response
> John Doe	Response Received
> Mark Smith	Awaiting Response
> Sandra	Awaiting Response

After clicking **Open Details**, a screen will open and provide the **Generate URL** button. (circled in red in the picture below) Generate the URL right before sending it, because it will only be valid for two weeks. The reviewer does have the option to request that they receive a refreshed, active link, if the link has expired. If the **mailto** function is enabled, the **Create email** button will automatically paste information into an email. Otherwise, hover over each data field to show a copy function.

Email Details to Copy

External Reviewer Email
greta@harvard.edu

External Reviewer Name
Greta Williams

Candidate Name
Dean Test Account

Unique URL
https://www.digitalmeasures.com/login/clemson/externalReviewer/xapp/workflow/landingPage?tokenId=N2lwYTVhNmYtZTAzZC00ZjVlLWJmNjgtYWJmNTI3NWFKYTVlLDFmZjAyYjZkLThmNGEtNGVlYyThY2Y3LWE2YmJmZTg2Y2JiOQ==

The above URL is valid until May 10, 2023 at 10:02 AM
If you have not yet sent this to Greta Williams, then select this button to generate a new one before sending your message. If you have sent this URL already, then Greta Williams will be able to generate an updated URL as needed.

Generate URL

OR, use the Create Email button below to create an email using your mailto settings. To learn more about configuring mailto for your browser, see [this](#) article.

Create Email

CLOSE

Review View – What the External Reviewer Sees

Below is a snapshot of what the external reviewer sees when they log into the system, after clicking on their unique URL.

External Reviewer Management Step - Due December 1, 2023 ✕ 📄 SAVE SUBMIT

▼ Initial Step Step - Dean Test Account Submitted April 24, 2023 by Dean Test Account

Comments

▼ Candidate External Reviewer List Step - Dean Test Account Submitted April 24, 2023 by Dean Test Account

You do not have access to this content

▼ Department External Reviewer List Step - Dean Test Account Submitted April 25, 2023 by EK EKTEST

You do not have access to this content

▼ Faculty Documents Step - Dean Test Account Submitted April 25, 2023 by Dean Test Account

Documents for External Reviewers - Please load documents below

Sample Article Text.docx (11.75 KB)

Sample Final Vita.docx (11.75 KB)

Sample Research Statement.docx (11.71 KB)

Vita of External Reviewer

[Drop files here or click to upload](#)

Recommendation Letter

[Drop files here or click to upload](#)

Below is what it looks like to the external reviewer as files are loaded:

Vita of External Reviewer

[Drop files here or click to upload](#)

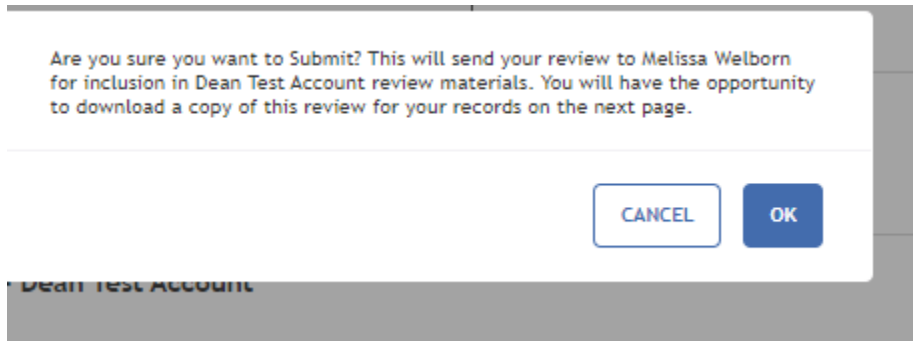
Melissa Welborn Vita.docx (11.75 KB) 🗑️

Recommendation Letter

[Drop files here or click to upload](#)

Melissa Welborn Recommendation.docx (11.75 KB) 🗑️

When documents are uploaded and the reviewer is ready to complete their work, this is the submission message that reviewers see:



Thank you for your review!

For your records, we recommend that you download a copy of what you submitted.

Download is only available while the review is active. If you have further questions or need to make any modifications to your response, please reach out to Melissa Welborn, welbor4@clmson.edu.

[DOWNLOAD A COPY](#)

If a reviewer exits and returns using the same link, this is the message:

Thank you for your review!

For your records, we recommend that you download a copy of what you submitted.

Download is only available while the review is active. If you have further questions or need to make any modifications to your response, please reach out to Melissa Welborn, welbor4@clmson.edu.

[SEND ME A COPY](#)

Notice that the Download link has now changed to send me a copy. This will only be available while the review is active.

Viewing External Reviewer Responses

Below the view when responses are received.

External Reviewer Responses - Dean Test Account 1/6 Responses Received

Below are your approved external reviewers. You can send them an invitation to provide a review by copying the URL shown in their row and pasting it into an email. Their review status will update to Accepted/Declined once they have responded to the invitation. Upon submitting their review, their status will change to Response Received. Expire their review link if you would like to prevent them from submitting a review and would instead prefer a review from a different individual.

BY REVIEWER	BY RESPONSE		
> Greta Williams	Actions ▾	Awaiting Response	
> Jane Doe	Actions ▾	Awaiting Response	
> John	Actions ▾	Awaiting Response	
> John Doe	Actions ▾	Response Received	Last Modified April 25, 2023
> Mark Smith	Actions ▾	Awaiting Response	
> Sandra	Actions ▾	Awaiting Response	

The view above is after links are generated for two of the reviewers. The view below is someone one might see after several colleagues have received requests and are waiting to confirm their participation as a reviewer. The “Awaiting Response” message will not appear until the external reviewer manager closes the process and reopens it. Save the process before closing your browser or stepping away for any length of time. Progress will be there when you return.

External Reviewer Responses - Dean Test Account 1/6 Responses Received

Below are your approved external reviewers. You can send them an invitation to provide a review by copying the URL shown in their row and pasting it into an email. Their review status will update to Accepted/Declined once they have responded to the invitation. Upon submitting their review, their status will change to Response Received. Expire their review link if you would like to prevent them from submitting a review and would instead prefer a review from a different individual.

BY REVIEWER	BY RESPONSE		
> Greta Williams	Actions ▾	Awaiting Response	
> Jane Doe	Actions ▾	Awaiting Response	
> John	Actions ▾	Awaiting Response	
> John Doe	Actions ▾	Response Received	Last Modified April 25, 2023
> Mark Smith	Actions ▾	Awaiting Response	
> Sandra	Actions ▾	Awaiting Response	


View the responses by Reviewer or by Response. Click the arrow beside the name to expand to see files from a certain individual.

BY REVIEWER BY RESPONSE


- Greta Williams Actions ▾ Awaiting Response
- Jane Doe Actions ▾ Awaiting Response
- John Actions ▾ Awaiting Response
- ▼ John Doe Actions ▾ **Response Received** Last Modified April 25, 2023

University/Institution	Title	Rank	Email
Anywhere University	Professor	Professor	melissa.welborn@gmail.com

Vita of External Reviewer

 [Melissa Welborn Vita.docx \(11.75 KB\)](#)

Recommendation Letter

 [Melissa Welborn Recommendation.docx \(11.75 KB\)](#)

- Mark Smith Actions ▾ Awaiting Response
- Sandra Actions ▾ Awaiting Response



When viewed by Response, the same information is organized differently. In this view, all of one type of document are grouped together across all reviewers (all vitas or all recommendation letters).

▼ External Reviewer Responses - Dean Test Account

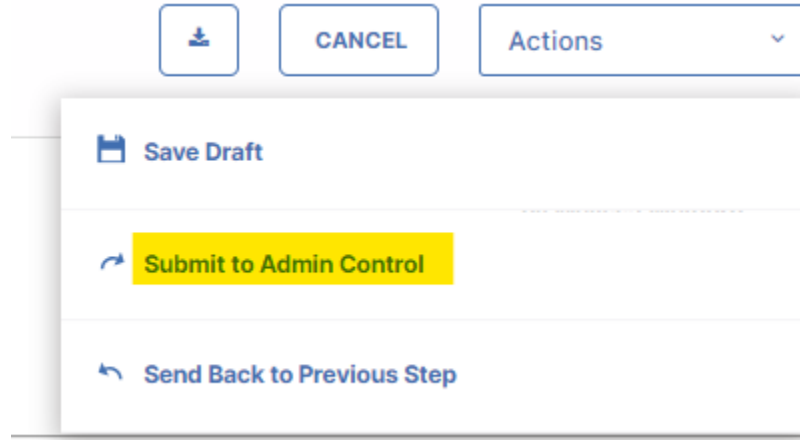
1/6 Responses Received

Below are your approved external reviewers. You can send them an invitation to provide a review by copying the URL shown in their row and pasting it into an email. Their review status will update to Accepted/Declined once they have responded to the invitation. Upon submitting their review, their status will change to Response Received. Expire their review link if you would like to prevent them from submitting a review and would instead prefer a review from a different individual.

BY REVIEWER BY RESPONSE

- ▼ Vita of External Reviewer 1 Responses
- John Doe
-  [Melissa Welborn Vita.docx \(11.75 KB\)](#)
- ▼ Recommendation Letter 1 Responses
- John Doe
-  [Melissa Welborn Recommendation.docx \(11.75 KB\)](#)

The external review manager should **wait until everything is received** from the external reviewers. After everything is received, the external review manager can select the **Submit to Admin Control** option in **Actions**.



Once the external reviews are in, the external reviewer manager will load these recommendation letters and vitas into the main candidate promotion process in the fall so that the other members of the committee and the Dean's offices will see them. At that time, the manager will also load the completed [External Reviewers Table](#) which shows if the reviewer was identified by the candidate or the department. This allows the gathering of external letters to run during the summer and early fall without holding up the TPR Promotion workflow process.

Potential Issues // Additional Helpful Information

The following section details issues that can happen with external reviewers, and how the problems can be solved.

Expired links

All generated external review request URLs are valid for 15 days, and the date/time at which they will expire displays below the link. If an external reviewer clicks an expired link, they can request that a new link be generated in the system for them.

External Review Status Meaning

Awaiting Response – The external review request link was generated and the assumption is that the link has been included in a personal e-mail from the external reviewer manager.

Accepted – The reviewer has accepted the review request within the Faculty Success system but has not submitted files yet.

Declined – If an external reviewer declines the invitation, their status will update to “Declined” on the main task view, along with the date that they declined.

External Reviewer Responses - Kimberly C. 0/3 Responses Received

Below are your approved external reviewers. You can send them an invitation to provide a review by copying the URL shown in their row and pasting it into an email. Their review status will update to Accepted/Declined once they have responded to the invitation. Upon submitting their review, their status will change to Response Received. Expire their review link if you would like to prevent them from submitting a review and would instead prefer a review from a different individual.

BY REVIEWER	BY RESPONSE			
> External Reviewer	Actions	Accepted		Last Modified December 28, 2022
> External Reviewer 2	Actions	Awaiting Response		
> External Reviewer 3	Actions	Declined	→	Last Modified December 28, 2022

Response Received – When an external reviewer submits an evaluation, their status will update to “Response Received” on the main task view, along with the date they submitted their documents.

External Reviewer Responses - Kimberly C. 1/3 Responses Received

Below are your approved external reviewers. You can send them an invitation to provide a review by copying the URL shown in their row and pasting it into an email. Their review status will update to Accepted/Declined once they have responded to the invitation. Upon submitting their review, their status will change to Response Received. Expire their review link if you would like to prevent them from submitting a review and would instead prefer a review from a different individual.

BY REVIEWER	BY RESPONSE			
> External Reviewer	Actions	Response Received	→	Last Modified December 28, 2022
> External Reviewer 2	Actions	Awaiting Response		
> External Reviewer 3	Actions	Declined		Last Modified December 28, 2022

How to Revoke an External Reviewer's Access

If an invitation was sent in error, or an external reviewer was **Approved** when they should have been **Skipped**, the external reviewer manager can use the **Revoke Access** action to undo an **Approval**. This action will revoke access by disabling the link that may have been sent to an external reviewer, and if that person is currently conducting a review, the contents will be deleted. This action cannot be undone. The suggested reviewer will then be marked as **Skipped** in the Aggregated External Reviewer view, and they will be removed from the task table. **Revoke Access** can be found under **Actions** (circled in the snip below)

External Reviewer Responses - Kimberly C. 1/3 Responses Received

Below are your approved external reviewers. You can send them an invitation to provide a review by copying the URL shown in their row and pasting it into an email. Their review status will update to Accepted/Declined once they have responded to the invitation. Upon submitting their review, their status will change to Response Received. Expire their review link if you would like to prevent them from submitting a review and would instead prefer a review from a different individual.

BY REVIEWER	BY RESPONSE
> External Reviewer	Response Received
> External Reviewer 2	Awaiting Response
> External Reviewer 3	Declined

The screenshot shows a table with three rows. The first row is for 'External Reviewer' with a status of 'Response Received'. The second row is for 'External Reviewer 2' with a status of 'Awaiting Response'. The third row is for 'External Reviewer 3' with a status of 'Declined'. Each row has an 'Actions' button. The 'Actions' button for 'External Reviewer' is circled in red. An arrow points from this button to the 'Response Received' status.

How to Delete an External Reviewer's Response

If a response was received that was malicious, from the wrong user, or for the wrong user, the response can be deleted. When a response is deleted, doing so permanently removes what the External Reviewer submitted, so if a copy is required for documentation/HR purposes it should be downloaded before the response is deleted. This action cannot be undone. The suggested reviewer will then be marked as **Skipped** in the Aggregated External Reviewer view, and they will be removed from the task table. The delete option is also under the **Actions** button circled above.

How to Reopen an External Reviewer's Response

If a reviewer needs to submit a corrected review, the external reviewer manager can reopen their response and send them a new link to re-submit their review. Once the reviewer receives the new link, they will be able to make any changes to what they previously submitted and resubmit their review. Reopening a response will remove the reviewer's previously-submitted response until they submit their new response. The **Reopen Response** option is also under the **Actions** button circled above.

Troubleshooting External Reviewer Messages

The information that follows is provided by Watermark:

When an External Reviewer clicks the link from their invitation email, they are taken to a landing page to Accept or Decline an invitation. The candidate they are being asked to review is included on this landing page.

You have been selected as a reviewer for Kimberly C., and are being invited to submit a review of their scholarship.

If you accept this invitation, use the Accept button below to indicate this.

If you prefer to decline to provide a review for this individual, use the Decline button instead.

Selecting Accept will take you to a new page where you will be provided with the individual's scholarship, and a place to provide your review.

[DECLINE](#) [ACCEPT](#)

If an invitation is Accepted, the External Reviewer is taken directly into the form created by the Workflow Administrator.

If an External Reviewer wants to decline the invitation after reviewing the form, they can do so by selecting the button with an "X" to Cancel or Save the form. Following the selection of either option, the option to continue the review or decline will be available.

You have a saved review in progress for Kimberly C., and are being invited to complete your review of their scholarship. Access your review using the Update Review button below.

If you are no longer able to complete this review, update your response to this invitation using the Decline button. Changing your response will remove any partial review that you have completed.

 [DECLINE](#) [UPDATE REVIEW](#)

If an External Reviewer Declines an invitation, they are able to change their mind at a later date and Accept an invitation previously declined.

Thank you for your consideration. If you change your mind, use the Accept button below. Otherwise, you may close this window.

ACCEPT

How to Submit a Review

An External Reviewer can submit their response after completing the review by selecting the SUBMIT button in the right hand corner and confirming in the pop up message that they want to submit their review by selecting the OK button.

The screenshot displays the 'External Review Step - Due December 31, 2022' interface. At the top right, there are buttons for 'X', 'Download', 'SAVE', and 'SUBMIT'. Below the title bar, the candidate information is shown: 'Candidate Step - Kimberly C.' and 'Submitted December 28, 2022 by Kimberly C.'. A central dialog box asks, 'Are you sure you want to Submit? This will send your review to Jonathan Adalberto for inclusion in Kimberly C. review materials. You will have the opportunity to download a copy of this review for your records on the next page.' The dialog box has 'CANCEL' and 'OK' buttons, with a purple arrow pointing to the 'OK' button. The background interface includes a 'Candidate's Impact on Discipline' section with a radio button for 'Below Expectations', a 'Reason for Impact Ruling' section with a rich text editor, and an 'Official Review Letter' section with a file upload area containing a document titled 'External Review 1 Document .docx (11.61 KB)'.

Once a response is submitted, the External Reviewer receives a confirmation message thanking them for their review. This message is not customizable. They will also be prompted with the option to download a copy of their review for their records.



Thank you for your review!

For your records, we recommend that you download a copy of what you submitted.

Download is only available while the review is active. If you have further questions or need to make any modifications to your response, please reach out to Jonathan Adalberto, jadalberto@youru.edu.

DOWNLOAD A COPY

Resolving System Messages

Your access link has recently expired

Each access link that an external reviewer uses to review expires on use. If a review is saved in progress, a new URL will need to be generated to continue work on the saved form. Workflow will bring the user to a confirmation page letting them know they need a new link, and upon selecting the CONFIRM & SEND button they will receive a system-generated email with a new URL to the email address noted in the system message. A user can also reply to their initial invitation email and ask the [on-campus reviewer](#) to generate a new URL for them.



You have a saved review in progress for Kimberly C., and are being invited to submit a review of their scholarship.

Your access link has recently expired. In order to receive an updated link, please confirm your email address.

Email Address Linked to your Invitation

`externalreviewer1@email.com`

CONFIRM & SEND

Your access is temporarily on hold

This message appears when an external review is trying to access their review and the submission has been sent back to a prior step, they will receive a note stating that the campus is not quite ready for their review and to check back later or contact the on-campus reviewer by replying to the initial invitation.



This candidate's review is being updated on their campus. Your access is temporarily on hold.

Try again later, or reply to your initial invitation email with any questions.

You no longer have access to this invitation

If an external reviewer tries to access their review after the submission has been advanced past the External Review step or the submission has been completed (either an Early Complete, or a normal Complete), they will receive a note stating that the campus no longer needs their review and to contact the on-campus reviewer if they have any questions.



You no longer have access to this invitation. This could be due to the review moving beyond this step, or your review no longer being needed.

If you have any questions, follow-up with Jonathan Adalberto at jadalberto@youru.edu.

You do not have access to this page

If an external reviewer tries to access their review after a schedule has been terminated (and all associated submissions deleted), they will receive a message stating that they no longer have access and to contact their on-campus reviewer.

You do not have access to this page. If you think this is in error, contact the person who shared this link with you to get an update.