Overview of 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. Steps for processes requiring external reviewers are highlighted.
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.
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.

Candidates answer the questions at the bottom and then submit.

Letter Requesting Promotion

Please submit your letter requesting promotion or reappointment. The table below lists the information needed by type of promotion.

<table>
<thead>
<tr>
<th>Type of Promotion Requested</th>
<th>Information Needed</th>
</tr>
</thead>
</table>
| Tenure-track faculty requesting promotion to associate professor with tenure | • Date hired as a full-time tenure-track faculty  
• Details related to tenure-clock extensions  
• Penultimate Year |
| Associate professor requesting promotion to professor | • Date promoted to associate professor  
• Date of tenure |
| Lecturer-track faculty requesting promotion | • Date hired as a full-time lecturer  
• Date of promotion to senior lecturer (if applicable) |
| Other Special Faculty Ranks (Research or Clinical) | • Date hired into current rank |

Requirements may vary by department, so check with your department chair to verify what files are expected.
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 DM Admin Schedule 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. (For associate professors not requesting promotion to professor, or senior lecturers not requesting promotion to principal lecturer and not needing reappointment in 23-24).

Letter Requesting Promotion or Reappointment

Draft Vita

Details of Request

Promotion Details

Reappointment Details

Comments
Available actions for the candidate are as shown:

- Save Draft
- Request to DM Admin Schedule Setup
- Request to Eligibility Review
- No Process Needed
- Send Back to Previous Step
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. This is set for each department based on information provided to DMAdmin earlier in the academic year. If the setting is incorrect, email DMAdmin@clemson.edu and request a change.

Once the reviewer selects the options in the dropdown items, choose Continue to Candidate External Reviewer List. (Note that for promotions not requiring external reviewers, choose Faculty Response Reappt or NTT Promotion.)
Candidate External Reviewer List

During this step, the candidate enters names and contact information for each external reviewer they wish contacted in the review process. The screenshots below show the candidate’s view.

Faculty Reviewer List

Please submit your list of external reviewers. A minimum of three is required by this form, but six is probably expected. Please check with your department chair or tpr chair to learn how many you should submit. Not all reviewers will be used. Guidelines can be found here: Link to External Evaluator Requirements

- At least two external letters should be from reviewers not nominated by the candidate and who have not served in advisory roles to the candidate (e.g. Ph.D. advisor)
- External letters should be from peer or aspiring peer institutions in the discipline
- External letters should be from individuals who are at least tenured Associate Professors (for tenure and promotion to Associate Professor) or Professors (for promotion to Professor)
- Any relationship between the candidate and the external reviewer must be clearly described within the external evaluator letters (include this in your letter requesting review)
- The optimum numbers of letters from external evaluators is a minimum of three from the candidate and three from committee/department list. There should not be more than four from either list, and not more than 7/8 in total. Include all letters received.

Suggested Reviewers

Note that candidate enters information about the first reviewer. They add additional reviewers by clicking the button that says Add another suggested reviewer (highlighted for clarity in the following picture).
This list is not visible by anyone until the External Reviewer Management step later in this process, so faculty may want to send their review list earlier to the external reviewer manager outside of the system.
Department External Reviewer List

Departments have the ability to enter external reviewer names in two steps: either here or at the External Reviewer Management step later in this workflow. This section can be left blank.

Once complete, choose Submit to Faculty Documents. Note that whoever is assigned to this step does not see the external reviewer list submitted by the candidate.
Faculty Documents Step

After department leadership submits their names, the workflow advances to the Faculty Documents Step, which returns to the candidate. At this step, the candidate loads files that they want the external reviewers to view. This step can be completed by the faculty member closer to the fall term if needed. Deadlines are set up to keep the process moving, but department process managers should let candidates know when they need the final files to go to the reviewers.

At no point during any TPR workflow, and especially at this step, will candidates see any external reviewer names entered or approved by the department. If external reviewer names are stored in the system, faculty candidates will see a statement like the yellow highlighted note below. This is what faculty will see when they view this step in the workflow.

Since the external reviewer manager will not be able to see the list of proposed reviewers until after these documents are submitted, they can request them directly from the candidate in a Word document.
**External Reviewer Management Step**

This is the step where reviewers are approved and contacted. The external reviewer manager is typically the TPR Chair, but in some departments, this function may be handled by the Department Chair or School Director.

External reviewer managers can manage that request through Faculty Success (as outlined in the steps below) or they may continue with the traditional practice of tracking external reviewer requests, completions, and submissions outside of the Faculty Success system.

A 15-minute instructional video was recorded in ZOOM that shows the approvals, how to send requests, and the reviewer experience. Screenshots of areas are included below in this resource guide, but if you want to see it in action, you can view the video.

The video is here:

[https://clemson.zoom.us/rec/share/XDMiCtmYulsQcjl375Tft4A9RNkTY0aozmshjekmF7rP6sam45bnmmSlZoUyG GFM.65mVuIJDUEJbc79](https://clemson.zoom.us/rec/share/XDMiCtmYulsQcjl375Tft4A9RNkTY0aozmshjekmF7rP6sam45bnmmSlZoUyG GFM.65mVuIJDUEJbc79)
Note how the reviewers are grouped by the source. The external reviewer manager also has the option to add additional reviewers at this step, by clicking the ADD REVIEWER button (highlighted above).
**Requesting a Review**

The external reviewer manager uses this step to generate a link that they can email to external reviewers. This link will allow the reviewers to view faculty documents and upload their recommendation letter and CV materials directly into the system. To generate the link, click **Actions**, and **Open Details**.

After clicking **Open Details**, a screen will open and provide the **Generate URL** button. (circled in red in the picture that follows) The link should be generated immediately before sending, because it will only be valid for 15 days. If a reviewer clicks on an expired link, they can request a refreshed, active link. 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.
**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. They load their documents and then click the submit button in the upper right-hand corner.
Below is what it looks like to the external reviewer as files are loaded:

When documents are uploaded and the reviewer is ready to complete their work, they click submit in the upper right hand corner, and this is the submission message that reviewers see:

If a reviewer exits and returns using the same link, this is the message:
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 managers will need to check their Faculty Success Tasks/Inbox to track pending external reviewers.

The view above is after links are generated for two of the reviewers. As responses are received, the view will change to indicate the status of the response. Save the process before closing your browser or stepping away for any length of time. Progress will be there when you return.

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

Once the external reviews have been received, 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 throughout the 2023-2024 academic year.
Potential issues

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 has been 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.

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.

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 disabbling 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 snippet below).

**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 below information is provided by Watermark:

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**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.**

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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.
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.

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.
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.

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 Adiberto, jabiberto@yale.edu.
Your access is temporarily on hold

This message appears when an external reviewer 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 external'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.

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 @

#email/18141@in2mail.com

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 Adelbert at jack@berkeley.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.