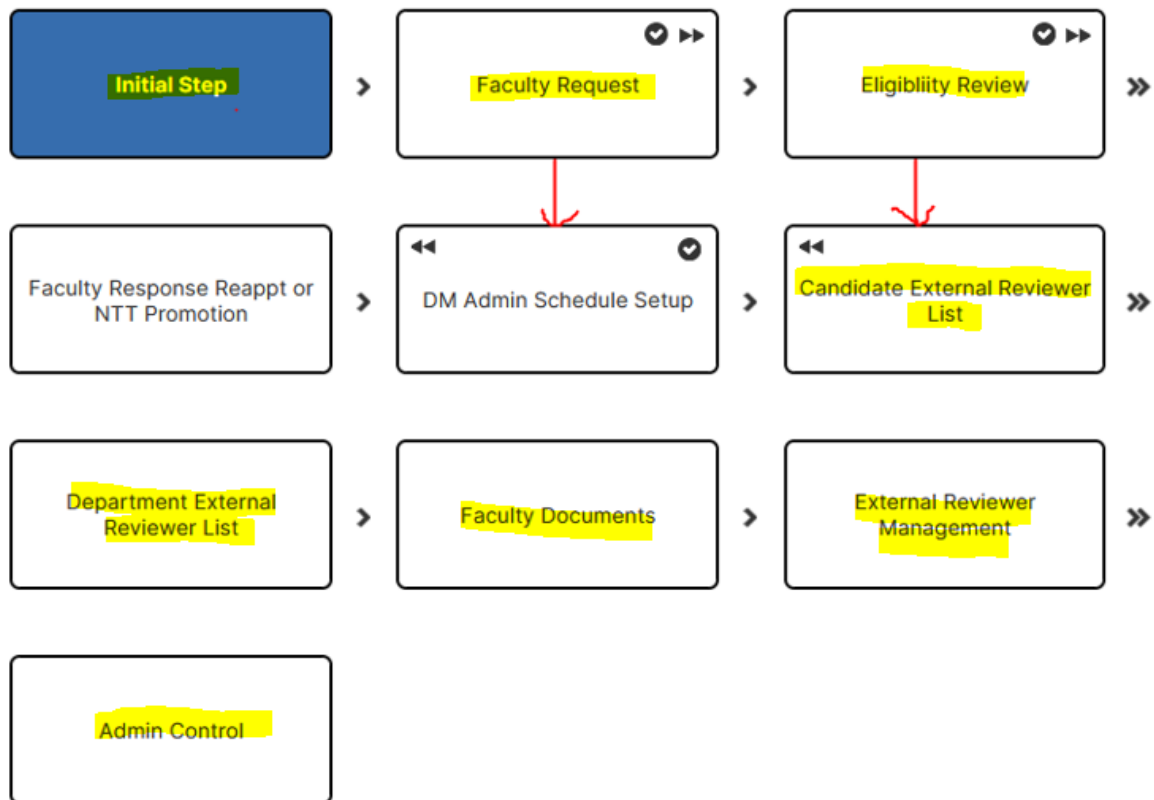


Overview of Pre-Check with External Reviewers

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.

Activities

CV Imports

Reports

Workflow


<

Initial Step Step - Due April 25, 2023 @ 11:59 PM

Initial Step

- No information is needed at this step. The form will auto-advance April 3.


Comments




CANCEL

Actions

▼

 Save Draft

 Submit to Faculty Request

2

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.

< Faculty Request Step - Due April 27, 2023 @ 11:59 PM

▼ Initial Step Step - Dean Test Account

Comments

Letter Requesting Promotion

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

Type of Promotion Requested	Information Needed
Tenure-track faculty requesting promotion to associate professor with tenure	<ul style="list-style-type: none">• Date hired as a full-time tenure-track faculty• Details related to tenure-clock extensions• Penultimate Year
Associate professors requesting promotion to professor	<ul style="list-style-type: none">• Date promoted to associate professor• Date of tenure
Lecturer-track faculty requesting promotion	<ul style="list-style-type: none">• Date hired as a full-time lecturer• Date of promotion to senior lecturer (if applicable)
Other Special Faculty Ranks (Research or Clinical)	<ul style="list-style-type: none">• 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

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

Draft Vita

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

Details of Request

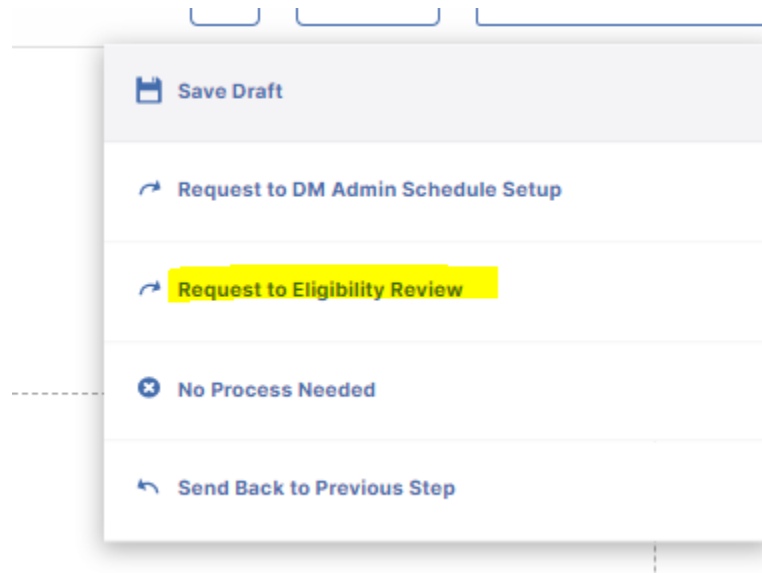
Promotion Details*

Reappointment Details*

Comments

B *I* U

Available actions for the candidate are as shown:



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@clermson.edu and request a change.

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

B **I** **U**

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

B **I** **U**

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 ?


Full Name *	University/Institution *
<input type="text"/>	<input type="text"/>
Title *	Rank *
<input type="text"/>	<input type="text"/>
Email *	Phone Number
<input type="text"/>	<input type="text"/>
Comments	
<input type="text"/>	


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).


Suggested Reviewers

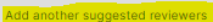
Full Name * <input type="text" value="John Doe"/>	University/Institution * <input type="text" value="Anywhere University"/>	
Title * <input type="text" value="Professor"/>	Rank * <input type="text" value="Professor"/>	
Email * <input type="text" value="melissa.welborn@gmail.com"/>	Phone Number <input type="text"/>	
Comments <input type="text"/>		

Full Name * <input type="text" value="Jane Doe"/>	University/Institution * <input type="text" value="Harvard"/>	
Title * <input type="text" value="Associate Professor"/>	Rank * <input type="text" value="Associate Professor"/>	
Email * <input type="text" value="JohnDoe@xxxx.edu"/>	Phone Number <input type="text"/>	
Comments <input type="text"/>		

Full Name * <input type="text" value="George Smith"/>	University/Institution * <input type="text" value="American"/>	
Title * <input type="text" value="Associate Professor"/>	Rank * <input type="text" value="Associate Professor"/>	
Email * <input type="text" value="JohnDoe@xxxx.edu"/>	Phone Number <input type="text"/>	
Comments <input type="text"/>		

Full Name * <input type="text" value="Mark Smith"/>	University/Institution * <input type="text" value="Northeast University"/>	
Title * <input type="text" value="Professor"/>	Rank * <input type="text" value="Professor"/>	
Email * <input type="text" value="JohnDoe@xxxx.edu"/>	Phone Number <input type="text"/>	
Comments <input type="text"/>		

Full Name * ▲ <input type="text"/>	University/Institution * <input type="text"/>	
<i>This field is required</i>		
Title * <input type="text"/>	Rank * <input type="text"/>	
Email * <input type="text"/>	Phone Number <input type="text"/>	
Comments <input type="text"/>		



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.

▼ Candidate External Reviewer List Step - Dean Test Account

You do not have access to this content

Please submit suggested reviewers below. If someone else in the department is providing reviewers, leave this form blank.

Suggested Reviewers ⓘ

Add another suggested reviewers

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.

▼ Department External Reviewer List Step - Dean Test

Submitted April 25, 2023
by EK EKTEST

You do not have access to this content

Documents for External Reviewers - Please load documents below *

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

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.65mVuJJDEUJBcr79>

▼ 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.

From Candidate External Reviewer List > Suggested Reviewers

▼ Janet Doe			
University/Institution	Title	Rank	Email
Everywhere University	Instructor	Instructor	JohnDoe@xxxx.edu
Phone Number	Comments		
n/a	n/a		
			<input type="button" value="SKIP"/> <input type="button" value="APPROVE"/>

▼ Mark Smith			
University/Institution	Title	Rank	Email
Northeast University	Professor	Professor	JohnDoe@xxxx.edu
Phone Number	Comments		
n/a	n/a		
			<input type="button" value="SKIP"/> <input type="button" value="APPROVE"/>

▼ George Smith

University/Institution

American

Title

Associate Professor

Rank

Associate Professor

Email

JohnDoe@xxxx.edu

Phone Number

n/a

Comments

n/a

SKIP

APPROVE

▼ Jane Doe

University/Institution

Harvard

Title

Associate Professor

Rank

Associate Professor

Email

JohnDoe@xxxx.edu

Phone Number

n/a

Comments

n/a

SKIP

APPROVE

▼ John Doe

University/Institution

Anywhere University

Title

Professor

Rank

Professor

Email

melissa.welborn@gmail.com

Phone Number

n/a

Comments

n/a

SKIP

APPROVE

From Department External Reviewer List > Suggested Reviewers

▼ John

University/Institution

Doe3

Title

Professor

Rank

Professor

Email

testy@test.edu

Phone Number

xxx-xxx-xxxx

Comments

n/a

SKIP

APPROVE

ADD REVIEWER

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).

12

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**.

The screenshot shows a table with two tabs: "BY REVIEWER" (selected) and "BY RESPONSE". Under "BY REVIEWER", there is a list of reviewers: Greta Williams, Jane Doe, John, John Doe, Mark Smith, and Sandra. To the right of the list is a column for "Response Status". A dropdown menu is open for Greta Williams, showing "Open Details" and "Revoke Access" options. The response status for each reviewer is: Greta Williams (Awaiting Response), Jane Doe (Awaiting Response), John (Awaiting Response), John Doe (Response Received), Mark Smith (Awaiting Response), and Sandra (Awaiting Response).

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 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.

The screenshot shows a modal window titled "Email Details to Copy". It contains the following information:

- 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=N2lwYTVhNmYtZTAzZC00ZjVlWJmNjgtYWJmNTI3NWFKYTVlLDFmZjAyYjZkLThmNGEtNGVlYy1hY2Y3LWE2YmJmZTg2Y2JiOQ==>

Below the URL, there is a warning: "The above URL is valid until May 10, 2023 at 10:02 AM". A note follows: "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." Below this note are two buttons: "Generate URL" (circled in red) and "Create Email" (circled in red). At the bottom right, there is a "CLOSE" button.

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.

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, they click submit in the upper right hand corner, and this is the submission message that reviewers see:

Are you sure you want to Submit? This will send your review to Melissa Welborn for inclusion in Dean Test Account review materials. You will have the opportunity to download a copy of this review for your records on the next page.

[CANCEL](#) [OK](#)

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@clermson.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@clemonson.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 managers will need to check their Faculty Success Tasks/Inbox to track pending external reviewers.

▼ 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
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">Greta Williams</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	Awaiting Response
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">Jane Doe</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">John</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">John Doe</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	Response Received
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">Mark Smith</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">Sandra</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	

Response Received
Last Modified April 25, 2023

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.



▼ 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
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">Greta Williams</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	Awaiting Response
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">Jane Doe</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	Awaiting Response
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">John</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	Awaiting Response
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">John Doe</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	Response Received
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">Mark Smith</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	Awaiting Response
<div style="display: flex; align-items: center;"> ➤ <div style="flex-grow: 1;">Sandra</div> <div style="border: 1px solid #ccc; padding: 2px 5px; font-size: 0.8em;">Actions ▼</div> </div>	Awaiting Response

Response Received
Last Modified April 25, 2023

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)

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.

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	Accepted
External Reviewer 2	Awaiting Response
External Reviewer 3	Declined

Arrows indicate the flow from Awaiting Response to Accepted and 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.

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

Arrows indicate the flow from Awaiting Response to Response Received and Declined.

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	Last Modified
External Reviewer	Response Received	December 28, 2022
External Reviewer 2	Awaiting Response	
External Reviewer 3	Declined	December 28, 2022

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:

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.

watermark
Faculty Success | formerly Digital Measures

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 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

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.

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.

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

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.