The University of Colorado School of Medicine now utilizes the ByCommittee P&T® platform for submission and review of all dossiers for faculty appointment, promotion and tenure requests. The system has been set up with templates to build dossiers in each of the three faculty series: Regular Faculty Series, Clinical Practice Series, and Research Professor Series. The system is designed to move dossiers through a workflow utilizing “Committees.” Several different committees have been initially set up in each department to function in this workflow, and instructions on how to modify those committees, as well as add additional committees, can be found in this document.

General Information

Logging in to Interfolio/ ByCommittee P&T®

All administrative users and faculty will access ByCommittee P&T® through the Interfolio log-in page. We have single-sign-on set up for the system, which means that you can access the system using your University log-in.

Note: administrative staff and faculty that do not have a University email account can create an Interfolio account and log in directly on the welcome screen without going through the partner institution. The information below is for users that are logging in using their University email address.

The URL for Interfolio is: https://account.interfolio.com/login. When you click on this link, you will see this screen:

Click on “Sign in through a partner institution” (DON’T click on the “Sign In” button yet!) and then choose “University of Colorado Denver/Anschutz Medical Campus” from the dropdown list, and click “Sign In.” This will take you to the SOM Portal, where you will provide your University sign-in information. You should then see this box:
When you hover over the box, you can click on “Administration,” which will get you into the system.

**Administrative Access**

Each department will have at least one administrator assigned who will have access to the highest level within the system, with the ability to move forward dossiers, return them to faculty for revisions, and create committees. Any other administrative staff within the department can have access to the system; however, their level of access will either be restricted at the section or division level (if that is how the department wants to manage dossiers), or they can be assigned access to one or more faculty members’ dossiers to assist in their compilation. Information regarding how to assign access can be found later in this document.

**Faculty Access**

For the first year of implementation of this system, we are only expecting that faculty submitting dossiers in 2016-2017 will be invited to begin compiling their dossiers. Once we have completed the process for this coming year, we will begin to roll this system out to additional faculty who want to utilize the system.

**IMPORTANT:** Faculty that will be submitting dossiers in 2016-2017 will be added as users, which we can do in the Dean’s Office as a “bulk” upload once we have the names of the faculty members that will creating dossiers this year. You can also add them as users yourselves following the steps above. Please do not invite a faculty member to begin their dossier until they have been added as a user, or they will not be connected to the University’s Single-Sign-On system.

**Dossier Templates**

I have created three separate templates to compile dossiers, one for each faculty series (Regular, Clinical Practice, and Research Professor). You will decide which template to use for each faculty member, which will contain specific information related to what needs to be included for an appointment or promotion in that series.
<table>
<thead>
<tr>
<th>Regular Faculty Series - Appointment or Promotion in the Regular Faculty Series, with or without the request for the award of tenure.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical Practice Series - Appointment or Promotion in the Clinical Practice Series.</td>
</tr>
<tr>
<td>Research Professor Series - Appointment or Promotion in the Research Professor Series.</td>
</tr>
</tbody>
</table>
Getting Started

Adding Users

Determine which administrative staff will need access to ByCommittee P&T®. You can easily add them as users by clicking on “User & Group Management” in the Navigation box:

Then click on “Add User.” Keep in mind that the individual will need to have and use a University email address in order to access the system.

Determine Faculty to Receive Access

Determine which faculty in your department will be submitting dossiers for appointment, promotion and/or award of tenure. Please forward that list of faculty to me as I will be setting up a workshop to help all of those faculty as they begin to put together their dossiers. If you aren’t sure about every faculty member that will be submitting dossiers, just send me what you can so we can start contacting those individuals.

Managing “One-Person” Committees for Admin Staff

You can create “One-Person Committees” to be assigned to individual faculty so that they can assist the faculty member in compiling and submitting the dossier. These individuals will be added into the Workflow.

Click on “User and Group Management” in the Navigation box at the top, then click on “Committees.” Click on “Add Committee”, and name the committee (a good idea is to name the committee based on the faculty member’s name – e.g., “Fred Jones Dossier.”) Select the unit where the faculty member resides (Department and/or Section or Division, if desired). You can then add the administrative staff person that will serve in that role.
Inviting Faculty to Begin Compiling Dossier

You are now ready to “Invite” faculty to begin compiling their dossiers. It’s simple! Click on “Case List” at the top of the page:

Then “+ Add Case”:

You will then click on your department from the list, and click “Confirm.” You will then choose which template to use, and click on that template. You will then add the faculty member’s name and email address, and leave the “Yes” button checked for “Will the Candidate Submit a Packet.” You can then put a due date on the packet, if you wish, but that is not required.

I have included some basic language as instructions to the candidate, which you can modify as necessary (e.g., choose the rank and whether tenure will be included, and add in additional department-specific information as necessary). I have included in these instructions a link to the newly updated Dossier Building Guide, the Dossier Checklist for 2016-2017, as well as a link to the Faculty Affairs Promotion and Tenure webpage, to aid them in compiling their dossier. The Dossier Building Guide was updated to include new recommendations for the page length of dossiers (should be 100 pages or less), as well as recommendations for content in each of the Portfolio sections (Teaching, Clinical, etc.).

Click “Save & Continue.”

You will then see the requirements for the dossier, including CV Abstract, CV, etc. We have included helpful information at most of the sections to explain what to include in the sections.

Click “Save & Continue.”

You will now see the workflow steps that the dossier will go through. I set up generic steps in the workflow, and I created “Committees” for each of those steps within each department, to make it easier for departments to get started. These steps can easily be deleted or reordered, or you can add workflow steps, including adding the administrative staff person (“One Person Committee”) that will be helping that individual faculty member into the workflow wherever you need them to be inserted.

Click “Save & Continue.”

You can now “Notify the Candidate,” which will send an email to the faculty member, inviting them to begin working on their dossier.
Managing Departmental Committees

You can now add the individuals that will be included in your Departmental Committees, first adding them as users as previously described. I set up the following committees for each department – you just need to add individuals to the committees:

1. **Department Review** - this is the first step in the workflow. This should be the Administrator that will be providing overall management of this process. This person will have the ability to move dossiers forward, if needed, and return dossiers to the faculty member for revision.

2. **Department Advisory Committee** – this is your departmental committee that will review the dossier and vote on its approval.

3. **Department Chair Review** – add in your department chair, and he or she will be able to review the dossier in the system.

*The following committees are committees set up at the School level and will be populated at that level.*

4. **Dean’s Office Review** – this is the first step after the department has approved the dossier. The dossier will come to the Dean’s Office to make sure everything is complete.

5. **FPC Subcommittee** – subcommittee review at the Faculty Promotions Committee.

6. **Faculty Promotions Committee** – this is the final step in this system. Final approval of dossiers occurs at the Executive Committee and Chancellor level (Regent level for tenure awards), but this system will not be used at those levels.

**Managing Dossier Workflow**

Once faculty have been invited to begin their dossier, they will be added to your Dashboard so you can monitor their progress.
You will be notified when a dossier has been submitted for review by the faculty member, as well as when it moves forward. The “Step” status will change on your Dashboard as well.

**Requesting Letters of Reference**

You can request letters of reference for faculty in one of two ways:

1. Utilize the “Request Evaluation” tool within the system, which is very simple to use. You can click on the faculty member’s dossier from your Dashboard, and click on the “Request Evaluation” button at the bottom of the Documents list.

You will see a screen that allows you to identify the individual to send the request to, as well as provide a message and add documents for the individual to review (e.g., faculty member’s CV, SOM promotion criteria, etc.)
If you request the Reference Letters this way, once the individual returns the letter, they will automatically be included in the faculty member’s dossier, even if it hasn’t yet been submitted by the faculty member. However, the faculty member will not have access to these letters, regardless of when they are included in the dossier.

2. The second way to request Reference Letters is to request them outside of the system (whatever your process has been in the past), and add them to the dossier by clicking on “Add File” on the External Evaluations Section. If they are added in this way, the faculty member does not have access to the letters.

Managing Completed Dossiers

Once a faculty member has completed their dossier and they submit it to the department, the Administrator can review the dossier for completeness. Each dossier will have a Case Data Form attached to it, which you can complete before forwarding on to the next step. The form includes basic information about their current rank, proposed rank, and whether they are requesting tenure. The form can be found by clicking on the dossier, then clicking the blue pencil (edit case) at the top of the page:

The form is located in the “Candidate Information” section:

Click on the “Answer” link and complete the form and click “Save.”
You can then forward the dossier to the next step in the workflow, which is likely the Department Advisory Committee. Some departments may include another review step in between, which is fine.

Once a dossier has been forwarded to the Department Advisory Committee, individuals on that committee will be notified that there is a dossier for their review, and it will be then be included in their Dashboard. When they click on the dossier, they will see the contents of the dossier, including Reference Letters. A new section will also appear in the dossier at this time, “Committee Documents,” which is where the Department Advisory Committee letter will be uploaded:

This letter can be uploaded into this section by the Administrator or the chair of the Department Advisory Committee. Department Advisory Committee Members can either read the dossier on the screen by clicking on “Read” at the top, or download the dossier into a PDF. If they download the dossier, an email will be sent to them with the link to the PDF.

Committee Members can also communicate with other committee members either through the comments section, or by email. The Committee Chair can also provide the final vote of the committee in this section:

The dossier can either be sent forward by the Committee Chair or the Administrator, which will move it to the next Step.

The Department Chair can review the dossier in the same two ways that were previously mentioned, and the Department Chair letter can either be added by the Department Chair or the Administrator.
At this point, I included another “Department Review” step in the generic workflows that I set up so that the Administrator would receive the dossier for review before forwarding on to the Dean’s Office.

Once the Administrator moves the dossier forward to the Dean’s Office, the dossier itself will not be viewable by the department; however, its status will still be listed on the Dashboard. If there are issues identified at the Dean’s Office, it can be sent backwards, at which time it will be viewable again.

**Resources**

If you have specific questions regarding anything contained in this Guide, or you run into questions as you begin to set up your committees or invite faculty to begin their dossiers, don’t hesitate to contact either Cheryl Welch ([Cheryl.welch@ucdenver.edu](mailto:Cheryl.welch@ucdenver.edu); 303-724-5356) or Katie Rodriguez ([Katie.Rodriguez@ucdenver.edu](mailto:Katie.Rodriguez@ucdenver.edu); 303-724-5357).

If you have a technical issue with the system itself, you can either contact Cheryl or Katie, or you can contact Interfolio directly at: [help@interfolio.com](mailto:help@interfolio.com) or (877) 997-8807 Monday- Friday 9–6pm Eastern Time.

The following are helpful links regarding the functionality of the system:

1. The Administrator's Guide to ByCommittee Promotion and Tenure  
2. Managing Users and Units  
3. Creating and Editing Committees  
4. Creating and Editing Templates  
5. Creating and Managing Cases  
6. Reviewing Cases  
7. Managing Packet Documents

These articles can be found on Interfolio’s [help page](https://help.interfolio.com) as well.