ByCommittee P&T
Tips for Administrative Staff

1. **Adding Users:** When adding users to the ByCommittee P&T system, **please make sure** that you are using the email address that they will be using to access the system, and that there aren’t any typos in the email address (**very important**). Any email address can be used (e.g., University, DHHA, CHCO, etc.), but if you do not use a University email, then you will NOT log in to the system using the partner institution log in instructions. The user will simply put in their preferred email and a password to log in to the system. If a University email is not used, then they will not pass through the portal. If you have any questions about this, please let me know.

2. **Dossier Templates:** Please make sure that you are using the right template before inviting a faculty member to begin their dossier (**very important**). If the wrong template is used, then the case needs to be closed and will have to be manually deleted by Interfolio staff, and a new case opened.

3. **Admin Staff Assistance with Dossier Compilation:** If your department is utilizing additional admin staff to help faculty members with their dossiers, the faculty member just has to upload one document (e.g., CV Abstract) in order for that admin staff person to have access to the dossier. Note that any documents that are added by that staff member CANNOT be viewed by the faculty member (this is a part of the system that we hope will be changed in the future by Interfolio). And the faculty member is the only person that can delete a document that they uploaded. Once a faculty member submits any sections, those become locked to the faculty member. If those sections need to be updated later or deleted and replaced, the admin staff person can click on the blue pencil that is to the right of the section that contains the document, then click on the “Candidate Editing” toggle button to allow editing of that section by the faculty member. See below.
4. **Committee Review of Dossiers:** If you are the main ByCommittee Administrator for your department, please review the Committee Member guide that I created so you can see what options are available for committee members. You can forward this document to your committee members. Note that ByCommittee P&T Administrators can perform any of the functions of a committee member, so you can upload the letters into the Committee Documents section, record a vote, etc., before moving the dossier forward.

5. **Links to Publications:** Another option (other than PubMed) to obtain links to publications is through OneDrive. Here are some basic instructions on how to create links. The key is to make sure that the link will be viewable by all.

   1. Faculty log in to Office365 using the @ucdenver.edu email & password [http://myemail.ucdenver.edu](http://myemail.ucdenver.edu)
   2. Select OneDrive (the cloud icon - NOT OneNote!).
   3. Upload documents to OneDrive
   4. Save
   5. Get 'share' link from OneDrive specific to the document ("those with this link can view")
   6. Post this link in your digital dossier so reviewers can directly access your documents from the dossier

   Note that if reviewing you are reviewing the dossier within ByCommittee (rather than downloading as a PDF), you must **right-click** on the link to open up the document. When you are reviewing the dossier as a downloaded PDF, you can click on the link as your normally would to open up a file.

The following information is provided directly from Interfolio (the company that developed ByCommittee P&T), and contains links to some of their resources.

6. **Creating committees and allowing them to review cases:** Committees are groups of users that can review and assess the case of a candidate at a given step of the review process. ByCommittee administrators can [create committees](#) made up of any of your department faculty or staff for each [step of your workflow](#). Remember, in order for your committee members to have access to a case, the [committee must be assigned to a review step](#) in the case workflow.

   Because Interfolio is aware that faculty promotion and tenure cases contain sensitive confidential information, they have deliberately designed ByCommittee’s workflow feature to ensure that a committee will only have access to the packet materials while a case is their specific workflow step.

7. **Communicating with your faculty:** When working with faculty, there are several ways to send messages and alert them of the review process. First, in order to get your case
initiated and allow the candidate the opportunity to work on their packet materials, you’ll need to notify the candidate. Then, at any point, if you need your candidates to make changes to their packet materials (ex: maybe you would like for them to update their CV), you can enable candidate editing per section of their packet and send emails to the candidate to let them know to make your requested updates.

8. **Communicating with your committees:** Committee Managers and Administrators can email a review committee and collaborate within a specific case. A record of all communications to candidates and committee members and case movements is kept within ByCommittee P&T so administrators will always have transparency while managing their cases.

9. **Requesting external evaluations:** ByCommittee P&T has incorporated tools that streamline the external evaluation process to make it easy for Administrators to request evaluations or resend previous requests from external scholars. Learn more about the external evaluator experience here. Remember, if you add a due date to an external evaluation request, it will be a hard deadline and letter writers will not be able to submit a letter after that date. If necessary, you’ll be able to clear or edit a due date while resending a request.

10. **Adding and managing committee documents:** After a candidate submits their packet and the packet is with one or more committees for review, Administrators and Committee Managers who have access to the case can add committee-specific sections and documents to the packet. Any document uploaded to a case by an Administrator or Committee Manager will be invisible to the candidate. These users will also have the opportunity to manage document permissions and add, reorder, or edit packet materials. Remember, only the candidate will have the opportunity to remove the materials that they uploaded and submitted to their case.

Here are some other ByCommittee P&T resources that might be helpful:

1. Committee Manager’s Guide to ByCommittee P&T
2. Committee Member’s (Evaluator’s) Guide to ByCommittee P&T
3. Candidate’s Guide to ByCommittee P&T
4. External Evaluator’s Guide to ByCommittee P&T

If you have any questions, please don’t hesitate to contact Cheryl Welch (Cheryl.welch@ucdenver.edu) or Katie Rodriguez (Katie.Rodriguez@ucdenver.edu).