Academic Year 2021-2022
Promotion: Workflow for Assembling and Reviewing the PAD

This document must be read in conjunction with the “Promotion: Folder Format and Naming Conventions” document, where detailed instructions about organization of subfolders, responsibilities of different parties, and DocuSign requirements are specified.

Deadlines for steps 2-7 can be found here.

Instructions and Tutorials for all the steps can be found here.

The folder structure is as follows:

A. Cumulative Report and Personnel Action Summary Form
B. Recommendations
C. Records of Evaluation
   o Criteria for Promotion
   o Annual Evaluations
   o Records of Assigned Teaching Duties and Reassigned Time
   o Communications with External Reviewers
D. Supporting Materials
   Note: All subfolders are provided in the template. Some faculty might not need them depending on their areas of responsibility. The subfolders are:
   o Teaching
   o Research-Creative Activity
   o Clinical Practice
   o Service
   o Administrative Activities
   o Other
E. Other Material
   Note: This subfolder might be empty.
F. Disagreements
   Note: This subfolder might be empty.

Step 1. CREATING THE PAD

a. The Unit Administrator creates a separate MS Team for each candidate in their Unit.
   
   • Name the team “Firstname Lastname Promotion Review”

   Note: See appropriate instructions for Creating a Separate MS Team for each candidate

b. The Unit Administrator downloads the Promotion PAD Folder Template from their Division SharePoint site and uploads into Candidate’s Team site (using ‘drag and drop’).
For Academic Affairs: The Academic Affairs Division SharePoint folder templates can be downloaded [here](#) (only accessible to Academic Affairs deans, associate deans, unit administrators, directors, and department and college personnel representatives).

For Health Sciences: Contact Lisa Hudson ([suttonli@ecu.edu](mailto:suttonli@ecu.edu)).

Note: if the downloaded folders are zipped, they must be unzipped before being uploaded into the Candidate’s Team site. Instructions for uploading the PAD folder templates to the Candidate’s Team can be found [here](#) (see page 4).

c. Using the “Add member” tab, the Unit Administrator adds the Candidate(s) to the appropriate Team(s) (instructions for doing this can be viewed [here](#)).

**Step 2. ASSEMBLING THE PAD**

a. The candidate and Unit Administrator upload documents as necessary to complete the PAD.

Notes:
- See appropriate PAD Instructions for [Promotion: Folder Format and Naming Conventions](#).
- Candidates can find the format for the Cumulative Report and Personnel Action Summary Form [here](#).

b. Recommended: Candidate and Unit Administrator meet one week before PAD submission to ensure that all required documents are in the PAD.

c. Unit Administrator removes Candidate from Team site.

d. Unit Administrator ‘locks’ the PAD. To do so, select ‘Open in SharePoint’. Then, using the ‘Manage Access’ tab, change the status of Team Members to ‘Can View’.

   Note: See appropriate PAD Instructions for [Locking the PAD](#).

e. Unit Administrator adds the appropriate College and Division representatives as Owners within the Candidate’s Team.

   - **For Academic Affairs:** Sherry Lillington ([lillingtons@ecu.edu](mailto:lillingtons@ecu.edu)) and the Unit Administrator’s Dean (or designee).

   - **For Health Sciences:** the Faculty Employment Manager assigned to the Department/College, Lisa Hudson ([suttonli@ecu.edu](mailto:suttonli@ecu.edu)), and Paula Daughtry ([daughtryp@ecu.edu](mailto:daughtryp@ecu.edu)).
Step 3. MAKING THE PAD AVAILABLE TO PROMOTION COMMITTEE

a. Unit Administrator makes Team site available to members of the Promotion Committee. In Teams, click on ‘Add Members’ and enter names or e-mails of the committee members (instructions found here).

b. Using DocuSign templates, Unit Administrator populates the Promotion Recommendation Memo and adds e-mail addresses to route to Committee Chair, Unit Administrator, Candidate, and Dean/Director. The candidate will receive a copy of the memos after each signature is added.

- **Note:** Templates for memos will be found in the “Promotion Recommendations” Shared Folder in DocuSign. Tutorials for interacting with the templates can be found here. A short video tutorial that shows how to make a document into a routable DocuSign “envelope” is found here.

STEP 4: COMMITTEE REVIEW

a. Committee undertakes review, meets in person or virtually (in Teams or WebEx) to deliberate.

b. Committee finalizes and approves Cumulative Evaluation of Candidate before voting on pending Personnel Action. (Guidelines and Procedures for writing a Cumulative Evaluation can be found here)

c. Committee votes on pending Personnel Action using secret ballots if meeting in person or Qualtrics if meeting virtually.

- **Note:** Memorandum about electronic votes can be found here. See tutorials for “Qualtrics for Secret Ballots” here.

d. Committee issues the Cumulative Evaluation and Recommendation Memo.

- Committee Chair e-mails copy of the Committee’s Cumulative Evaluation to Unit Administrator. Unit administrators adds it to “Folder B. Recommendations.”

- Using the template provided by the Unit administrator, the Committee Chair adds the committee’s recommendation to Memorandum via DocuSign.

- **Note:** Unit Administrator will receive an immediate e-mail prompt from DocuSign to add their recommendation. This e-mail should be saved for future reference. As noted above, the candidate will automatically receive a copy of each memo from DocuSign that serves as notice of the Committee’s recommendation.

Step 5. UNIT ADMINISTRATOR REVIEW

a. Unit Administrator undertakes review.

- **Note:** If unit administrator is considering non-concurrence with committee’s recommendation, procedures specified in Faculty Manual, Part IX.I.IV.I must be followed.
b. Unit Administrator issues Cumulative Evaluation and adds concurrence/non-concurrence to Recommendation Memo via DocuSign. Guidelines and procedures for writing the Cumulative Evaluation can be found [here](#).

Note: Candidate and Committee Chair will automatically receive a copy of each memo from DocuSign that serves as notice of the Unit Administrator’s concurrence/non-concurrence.

### Step 6. DEAN’S REVIEW

a. Candidate Team Owner in Dean’s Office grants appropriate personnel access to the Candidate’s Team (view only).

b. Dean undertakes review.

  Note: If Dean is considering non-concurrence with previous recommendations, procedures specified in Faculty Manual, Part IX.I.IV.I must be followed.

c. Dean adds concurrence or non-concurrence to Recommendation Memo via DocuSign. Completed memo is placed in Folder B by Unit Administrator.

  Note: Candidate, Committee Chair, and Unit Administrator will automatically receive a copy of each memo from DocuSign that serves as notice of the Dean’s concurrence/non-concurrence.

### Step 7. VICE CHANCELLOR REVIEW

a. Candidate Team owner in Division Office grants appropriate personnel access to the Candidate’s Team (view only).

b. Vice Chancellor undertakes review

  Note: If Vice Chancellor is considering non-concurrence with previous recommendations, procedures specified in Faculty Manual, Part IX.I.IV.I must be followed.

c. Division notifies Candidate, Committee Chair, Unit Administrator and Dean of Decision.

d. All documents in Folders A, B and C printed and/or stored to become part of the Candidate’s Personnel File according to the [Electronic PAD Closeout Protocol](#).