Workflow Manager: Instruction Guide for Tenure &/or Promotion (Abbreviated Version)
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Welcome to Workflow Manager!

Workflow Manager is a TTUHSC-SOM auto-advancement, web-based program used by the School of Medicine for annual processes including but not limited to Mid-Cycle Review (MCR) and Tenure & Promotion (T&P). This system allows users to request approval to participate in processes, submit applications, upload necessary documentation, review applications, cast ballots, and provide anonymous comments when applicable.

Workflow Manager aids in moving a process to the next step after prior steps have been completed. For example, when invited to participate in a process, faculty can accept the request or indicate their interest in participation, which will automatically trigger an email to their department chair notifying the chair of the faculty’s desire to participate. The department chair can then approve the faculty’s request, which will trigger an email to be sent back to the faculty member informing them of their chair’s decision and granting them the ability to upload documentation (such as a promotion application).

Information about the use of the program can be found in this manual, and one-on-one or group training is available upon request from the Office of Faculty Affairs and Development.
Faculty Member Instructions
Faculty Member Instructions:
For Mid-Cycle Review (MCR) and Tenure &/or Promotion (T&P) Processes
Each process will be initiated by the Office of Faculty Affairs & Development via TTUHSC email.

Faculties will be invited, via email, to participate in either the MCR or T&P process and can choose to accept or decline participation by clicking a link within the email.

Example email:

Process Open

T TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER
School of Medicine

Dr.

In accordance with School of Medicine and Board of Regents’ policies, this is your formal notification that the 2024-2025 Tenure and Promotion Process is open.

For more information about the Tenure and Promotion process, please visit the Tenure and Promotion webpage, here.

If you are ready to submit your participation request to your department chair, you may do so here: SOM Tenure and Promotion Requests. Log in and click on "Submit Request" to get started. This will send an automatic email to your department chair informing them of your desire to participate. Once your chair is notified of your intent, they can formally submit your name to the Office of Faculty Affairs and Development.

If you do not wish to participate in the 2024-2025 Tenure and Promotion, please go here: Decline

If you have any questions please contact som.facdev@ttuhsc.edu

**If faculty choose to decline participation, no further action is needed.**
If faculty choose to accept the invitation, they can either click on the link in the email that will take them to the Workflow Manager, or they can log into Workflow Manager, then select “Invitations.”

**Note:** If “Invitations” is not available, this means the faculty did not receive an email notifying them the process has opened (see email on previous page), or they have already completed this step.

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![Workflow Manager Interface](image)

After clicking “Invitations,” faculty will see the list of current processes open to them. They will need to click on the process they wish to participate in:

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![Invitations List](image)

After clicking on the process, in this case Tenure and Promotion, faculty will see:
It is HIGHLY important to make sure you select the proper request type, and title applying for (if promotion is selected). Your choices will be:

- **Request Type:**
  - Promotion
  - Tenure (do not select this unless you are on, or planning to switch to, the Tenure Track)
  - Tenure & Promotion (do not select this unless you are on, or planning to switch to, the Tenure Track)

- **Title Applying For:**
  - Associate Professor
  - Professor
  - Research Associate Professor
  - Research Professor

Once faculty select their Request Type and Title Applying for, click “I Want To Participate.” An email will be sent to the department chair notifying them of their faculty member’s intent to participate in either promotion, tenure, or tenure and promotion.

**Note:** Requirement of the department chair to formally submit applicant’s name is not needed for a MCR.
Once the department *chair formally submits* the faculty name, an email will be sent to the faculty member informing them how to proceed for the remainder of the Tenure and/or Promotion process, including submission deadlines.

**Example email:**

**Chair Formally Notified OFAD**

**Please review the following information**

**TEXAS TECH UNIVERSITY**

**HEALTH SCIENCES CENTER**

**School of Medicine**

Dr.

Your department chair has formally submitted your name to participate in the Tenure and Promotion cycle. In accordance with School of Medicine and Board of Regents' policies, you are invited to participate and submit your request for Tenure and/or Promotion.

*Please read carefully!*

The documents necessary to begin the your promotion process may be found at the following links: The SOM OP 26.21 Faculty Tenure and Promotion policy includes links to the Timeline, the Procedures for Tenure and Promotion and the Faculty Success (formerly Digital Measures) link for generating the Application for Tenure and/or Promotion. We have also created a webpage with information on Tenure and Promotion which you may find [here](#). Please remind your faculty member that the signed Application for Tenure and/or Promotion along with all appendices must be completed and submitted electronically (e-mail or flash drive) in one pdf file to the Office of Faculty Affairs and Development no later than

Workshops designed to help your faculty complete the T & P Application will be held in June. Please see the Tenure and Promotion Website for specific dates of attendance. RSVP is required. We will provide location information when we receive your RSVP. We encourage you to attend one workshop as attendance may help avoid grief from misunderstandings in completion of the T & P Application later in the process.

As an applicant, it is your responsibility to furnish the Campus Department Chair with five (5) names, addresses and email addresses from which the Chair can contact for letters of reference that address academic credentials. Reference letters from the following list are acceptable and are listed in order of preference as determined by the SOM T&P Committee:

1. another academician, not employed by TTUHSC at or above the rank desired,
2. blind letters from academicians (not known to applicant),
3. someone who works with academicians (AMA, etc.) at a state or national level,
4. faculty member that has been at TTUHSC and left.

If the faculty member does not know five (5) academic colleagues, the Campus Department Chair along with the faculty member can identify individuals who can be asked to evaluate the faculty member’s CV using the appropriate table. It is the responsibility of the Campus
It is at this time that faculty will begin preparation of their application using Faculty Success. Once the application is complete (including necessary appendices) and ready to submit to their department chair, faculty will log into Workflow Manager and upload their final, signed application and appendices in one (1) .pdf.

- **Applications will only be accepted by the OFAD if all documents are uploaded to this system, and in this format.**
- **For assistance with creating your application, faculty should attend a T&P Workshop, access the T&P Informational Webpage, access the Faculty Success webpage, and/or reach out to the Office of Faculty Affairs and Development.**
Steps for request to participate and/or upload completed applications:

To Request to Participate:
1. Either use the links in the above-mentioned email, or Log into Workflow Manager using your eRaider ID and password.

2. Click on ‘Submit Request’

3. Review your cycle and ‘Request For’ type, then click ‘Create Request’
To **Upload your Completed Application**:  

Uploading your final application: Follow the steps above to access Workflow Manager. Click on “Submit Request” as mentioned in the step above. Again, confirm your current track and title are correct, then select what you are applying for and the associated title. Upload your finalized application, then click ‘Notify Chair.’

a. **If you are applying for Tenure ONLY, you do not need to select the ‘Title Applying For.’**  
b. **IMPORTANT NOTE:** The system will allow you to proceed prior to uploading your application, so **MAKE SURE YOU UPLOAD YOUR APPLICATION prior to clicking ‘Notify Chair.’**

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The faculty has now completed their portion of the T&P Process. **Note: Once the ‘Notify Chair’ button has been selected, the faculty member will no longer be able to access their application or any other documents uploaded from this point forward for the duration of the T&P process. Therefore, remember to keep a copy for your records.**
Department Chair Instructions
Department Chair Instructions

Once faculty click “I Want To Participate” in the Workflow Manager, an email will be sent to the department chair notifying them of their faculty member’s intent to participate in either promotion, tenure, or tenure and promotion.

**Note:** Requirement of the department chair to formally submit applicant’s name is not needed for a MCR.

**Example email:**

**Chair Notification of Faculty Request**

Texas Tech University Health Sciences Center  
School of Medicine

Dr.

Dr. [Name] has requested to participate in the 2024-2025 Tenure and Promotion cycle. Dr. [Name] is requesting Promotion to the rank of [Rank].

In order to notify the Office of Faculty Affairs and Development of this candidate’s intent to participate, please [Click Here].

Please encourage your faculty member to attend the Tenure and Promotion Workshops offered by the Office of Faculty Affairs and Development. Attendance may help avoid grief from misunderstandings in completion of the T & P Application later in the process.

If you have any questions please contact [som.facdev@ttuhsc.edu](mailto:som.facdev@ttuhsc.edu).

The department chair will click on the ‘Click Here’ link, and they will be directed to [Workflow Manager](mailto:). Below is an example of what the chair will see:
The department chair needs to:
1. Verify the process (tenure, promotion, or tenure & promotion)
2. Verify the rank (Associate Professor or Full Professor)
3. Click “Formally Submit”

**Note:** If the incorrect process or incorrect rank is visible, the chair needs to reach out to the faculty member to discuss the error. Then, the faculty member and/or chair can reach out to the OFAD to have the error corrected.

The Department Chair must now wait until the faculty member completes their application and submits their packet to Workflow Manager. Once faculty upload their dossier into Workflow Manager, the department chair will receive a notification email.

**Example email:**

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Chair Notification Request is Ready for Review

TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER
School of Medicine

Dr.

Dr. [Name] has uploaded their application for the 2023-2024 Tenure and Promotion cycle. Please use this link to access the application: [Link]

Your responsibility will be to review the application, sign the application, and reupload it to the system. Additionally, you will need to attach the 3-5 Required Academic Reference Letters, of which you have received, to the appropriate section of this program, which is indicated by the section that says, “Academic Letters of Reference.”

**DO NOT combine the reference letters with the .pdf of the application. Make sure to upload them into the system separately!**

If you have any questions please contact som.facdev@ttuhsc.edu

1. Department chairs and their indicated proxy have 2 options to access the faculty’s application:
   1. Click on the link referenced in the email
   2. Log into Workflow Manager using your eRaider ID and password.

   Upon log in, you will see the screen below:
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2. Click on ‘Review Requests’ option under the ‘Chair’ category. The number of review requests is dependent upon the number of faculty within the department who have requested to participate in a process or who have submitted documents for chair’s review. After clicking ‘Review Requests’ you will see a screen similar to the one below (image on next page):
As you can see in the image above, there are 4 requests for this particular example. Explanation is as follows:

1. Name: Will populate faculty member’s name under the ‘Name’ title
2. Chair Decision: Will indicate the chair’s decision on the faculty’s request to participate in the process
   a. Accepted: The chair approved the faculty’s request to participate
   b. Pending: The chair needs to formally submit the faculty member’s name to OFAD through Workflow Manager
      i. If the faculty member has decided not to participate, the faculty member and/or department chair needs to inform the OFAD via email (som.facdev@ttuhsc.edu)
3. Request Status: Indicates which step the chair needs to complete next. There are 3 possible options for this status. They are as follows:
   a. **Blank:**
      i. The chair has not formally submitted the faculty member’s name to the OFAD, and therefore faculty has not yet submitted documents
      ii. The chair has formally submitted the faculty member’s name, but the faculty has not yet uploaded their dossier to be signed by the chair.
   b. **Pending Submission:** The chair has formally submitted the faculty member’s name to the OFAD, and the faculty has uploaded their application. At this point, the **chair needs to:**
      i. Review the application and sign the application
      ii. Submit the application back into Workflow Manager
      iii. Upload the required academic reference letters into Workflow Manager (do not combine them with the candidate’s dossier)
   c. **Submitted:** The chair has formally submitted the faculty member’s name to the OFAD, the faculty has uploaded their application, the chair has reviewed the application, signed the application, attached the required academic reference letters, and submitted the documents. Once submitted, chairs will no longer have access to add, edit, or remove documents from the system.

4. The chair will need to select the faculty member for whom they wish to review and sign the application. They can do so by clicking the “Select” button under the faculty’s name. A screen similar to this should appear:
The department chair can download the application by clicking “View the Application.” Once they review and sign the application, they can then re-upload it into Workflow Manager.

5. Separately, the required Academic Letters of Reference will also be uploaded by the department chair at this time. These will need to be uploaded to the “Academic Letters of Reference” section shown in the image above.

6. Click “Submit”

**DO NOT UPLOAD your CHAIR’S LETTER OF SUPPORT at this time! You will upload your letter of support after the Departmental Committee Voting has closed.**

*For the moment, the department chair’s duties are complete.*

After the departmental committee’s review and vote, the department chair will revisit Workflow Manager to review the application one last time (if necessary), view the departmental vote, and upload their departmental chair letter of support.