Loading Initial / Final Recommendation Letter

Initial and final recommendation letters are loaded to the case(s) by a committee manager. Depending on the reviewer and review level, this will be the committee chair, department chair, dean, or administrative assistant.
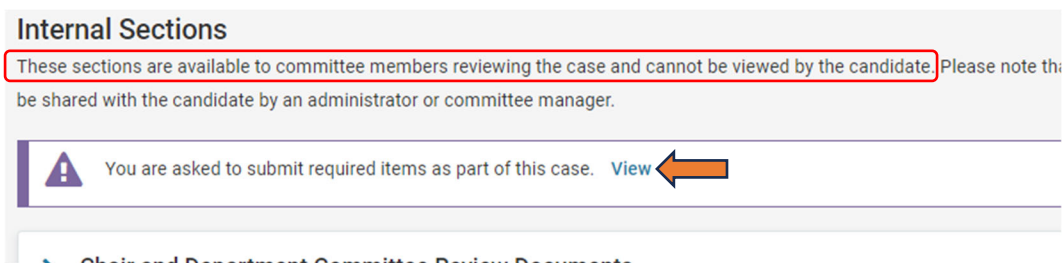
Loading initial or final letter in Required Items

1. Navigating to Required Items

    - Select Case Details tab [Case Materials | Case Details 2] and scroll to "Required Items"

    OR

    - Under Case Materials [Case Materials | Case Details 2] scroll to Internal Sections (*DO NOT* load required letters here. *See note below for loading other documents.)* and click View. View takes you to Case Details, Required Items.

    Internal Sections

    These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that be shared with the candidate by an administrator or committee manager.

    ⚠ You are asked to submit required items as part of this case. **View** ←

2. Under Required Items, select "+ Add" on the relevant letter line.

    ⌄ Required Items   2 missing

    All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

    Dean initial letter   → [⊞ Add]

    No files have been added to this section.

3. Browse to upload the letter from your files.

    Upload a new file   Select file from case

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    Drag & Drop your files anywhere or

    → [Browse To Upload]

4. Edit document "Name" as needed. Must include reviewer level, initial or final, candidate name, AY or year of review.

   4.a. **Dean / College Committee** letters – change "Section" to "Dean and College…."

   Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

5. Click "+ Add."
   The letter is now listed in required items and will be viewable within the case by current and subsequent reviewers (not candidate).

CANDIDATE CANNOT ACCESS THE UPLOADED LETTER yet. It must be "shared" with them and prior reviewers.

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*Note: If your unit normally sends a separate cover sheet with the recommendation letter, that information could be included in the message when sending the letter (see "Sharing …. letter with candidate"), or the cover sheet may be loaded to the Case Materials Internal Section. The recommendation letter already loaded in Details and the additional document can be selected and shared with the Candidate at the same time from Case Materials.

Continue to "Sharing initial or final letter with candidate" and "Sharing letter with prior reviewers."

Resources: https://www.fhsu.edu/academic/provost/digital-portfolio-system (guides, training, reviewer FAQ)
8/16/22 step-by-step instruction video https://app.vidgrid.com/view/IQtHj1WJQHEd.