

# Completing Post Tenure Committee Manager Tasks

Resources: <https://www.fhsu.edu/academic/provost/digital-portfolio-system> (log in, guides, reviewer FAQs)

While most information within the page above is for tenure or promotion review, much is relevant to any digital review.

ALL reviewers / committee members: Interfolio Cases tab - open case and select **Read Case** to begin review.

See [https://product-help.interfolio.com/en\\_US/reviewing-cases/view-case-materials](https://product-help.interfolio.com/en_US/reviewing-cases/view-case-materials)

## Committee manager tasks *(following initial reading / review of file)*

Committee manager access, depending on review level: **committee chair, dean, administrative assistant**

Start with Case Manager **Instructions** under **Case Details** tab.

**Instructions will vary by review level.**

**Instructions**

Thank you for serving on the post-tenure committee.

Refer to the timeline to complete your committee processes after review of file(s).

Committee chair/manager will:

1. Upload statement of findings to the **Case Details** section. *Candidate cannot see the uploaded document until **step 2** is completed.*
2. Share statement with candidate from **Case Materials Internal Sections** (select statement, then Share button) and enable response. Required email message should refer candidate to statement or MOA for optional redress.
3. Share statement with department / program chair - from **Case Materials Internal Sections** (select statement, Share "with committee," "Add another User," search for name, then select "Add Users," Delete any unneeded names in To section.)
4. Send case forward after sharing statement with candidate and chair.

Step by Step PDFs with screenshots. See *FHSU Guides - Committee Manager, Completing Post Tenure Committee Manager Tasks*

**Required Items** 1 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.

**Department Committee Findings** Add

per MOA Article X: Post-Tenure Review C.3.: The committee will review the faculty member's file and issue a written statement of its findings within two weeks. This statement will highlight exceptional performance, outline opportunities for improvement, and recommend actions for continued, long-term contribution as a member of the department and the university community. The review findings will remain with the file and the candidate and department chair will receive copies of the review findings.

No files have been added to this section.

Unlike tenure or promotion review, the MOA Post-Tenure article does not allow for candidate changes at any level after submitting a file.

- Do not unlock cases: The candidate packet should **remain “Locked”** during review. See screenshot of a locked case below. Contact Provost’s Office if you notice a Candidate Packet is unlocked.

**Candidate Packet**

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will not be able to edit or delete files in an unlocked section before they submit.

✓ Candidate Packet **Locked** Correct

**Unlock**

Candidate editing is disabled. The candidate cannot add, edit or submit materials for this section. Click the unlock button to enable candidate editing.

## Loading statement of findings in “Required Items”

### 1. Navigating to Required Items

Select **Case Details** tab Case Materials **Case Details 1** and scroll to “Required Items”

### 2. Under Required Items, select “+ Add” on the relevant letter line.

✓ **Required Items** 1 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.

**Department Committee Findings** + Add

per MOA Article X: Post-Tenure Review C.3.: The committee will review the faculty member’s file and issue a written statement of its findings within two weeks. This statement will highlight exceptional performance, outline opportunities for improvement, and recommend actions for continued, long-term contribution as a member of the department and the university community. The review findings will remain with the file and the candidate and department chair will receive copies of the review findings.

No files have been added to this section.

### 3. Browse to upload the document from your files.

**Upload a new file** Select file from case

**Drag & Drop your files anywhere or**

Browse To Upload

4. Edit document “Name” as needed.

4.a. **Dean** findings – change “Section” to “**Dean Review Documents**” *Committee chair skip step 4.a.*

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

The screenshot shows a form with two main fields: "Name \*" and "Section \*". The "Name \*" field contains the text "Dean findings V. Tiger post-tenure review". The "Section \*" field is a dropdown menu with "Dean Review Documents" selected. Below the dropdown, two other options are visible: "Department Committee Findings" and "Dean Review Documents". A yellow callout box with an arrow points to the "Dean Review Documents" option in the dropdown, with the text "Dean findings" next to it.

5. Click “+ Add.”

The statement is now listed in required items and will be viewable within the case by current and any subsequent reviewers (candidate cannot see it yet).

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**CANDIDATE CANNOT VIEW THE UPLOADED Statement yet. It must be selected & shared with them and chair / prior reviewers.**

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**Continue to** “Sharing statement of findings with candidate” and “Sharing statement with others.”

## Sharing statement of findings with candidate

NOTE: Committee prepares one statement. Initial/final letters are NOT created for post-tenure review.

1. Navigate to **Case Materials** Case Details 1 , scroll down to “Internal Sections,” click section drop down arrow.

### Internal Sections

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

You are asked to submit required items as part of this case. [View](#)

Department Committee Findings

Edit

Add File

Dean Review Documents

Edit

Add File

2. **Select box** next to document. Candidate **cannot access/view shared doc if the box is not checked** before sharing.

▼ Department Committee Findings

EditAdd File

- **DO NOT** add required statement here. -

1. First, go to **Case Details tab** (top of case) to add document in the Case Details "Required Items." The statement will then automatically save here too. (Candidate response also saves to this "internal section.") **This reviewer area of the case is NOT visible to the candidate.**

2. Then return to this Case Materials tab/section to **select box next to statement and share** (top right) with candidate and department/program chair.

Materials

Title	Details	Actions
<input checked="" type="checkbox"/> V. Tiger Post Tenure Review Committee Findings	Added by Janet Kohl Oct 15, 2025	Edit

3. **Select Share** (top of screen) and **"With Candidate."**

Share

With Candidate

With Committee Members

4 **Add subject and message.** See sample text below.

The message may also mention candidate's optional redress to the dean regarding committee findings.  
*Do not refer to the statement as "attached". The recipient will receive a link, not the document itself.*

### Message to Candidate

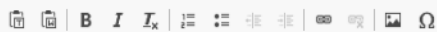
To

Victor E. Tiger (victoretiger@interfolio.com)

Subject \*

Department committee's post tenure review findings

Message \*



The department post-tenure review committee's statement of findings has been uploaded and can be found under the "Shared Committee Files" tab within your case.

Sample text: The department post-tenure review committee's statement of findings has been uploaded and can be found under the "Shared Committee Files" tab

Share Files

Files shared with this message can be viewed by the candidate after logging into Interfolio.

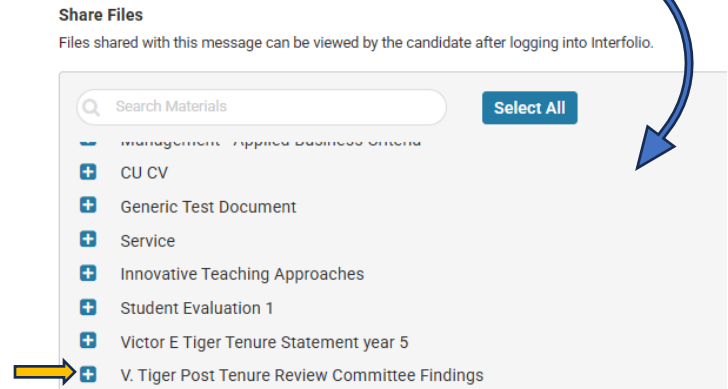
+ Add

V. Tiger Post Tenure Review Committee Findings

5. **Verify the statement is listed** under “Share Files” (as above). Proceed to step 6 (cmt chair) or 7 (dean) if the correct file is present.

If no document or an incorrect document is listed:

- **No document** - The statement was not selected before clicking Share. Click “+ Add” and select the document.
- **Incorrect document** - Click the x to remove it and then “+ Add” to select the correct document.



6. Enable candidate response/redress *Post Tenure Review Committee Chair* (*Dean skips this step*)

Enable candidate response to statement of findings.

- Select “Enable”**
- Add Message Reason** “Optional redress of committee’s findings”
- Enter Deadline date** (Within 1 week of issuance of findings. See [timeline](#). Candidate will only be allowed to respond on or before this date.)
- Select Section**

Select “Department ...” for response to department committee.

7. Click **Preview** (optional) to view the message as it will appear to the candidate. Select “Edit” to return to the message or proceed to step 8 if no change is needed.

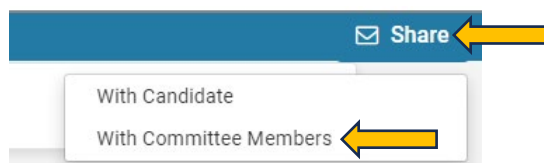
8. Click **“Send”** to complete the process or **“Cancel”** to exit without sending or editing and return to the case.

When response is enabled, any submitted response will save to the selected internal section and be viewable by reviewers.

## Sharing statement of findings with others see MOA X.C. 3-5

This process is similar to sharing your statement with the candidate *with the exception of* steps below.

1. **Select document** (see steps 1 & 2 of sharing with candidate) in the Case Materials Internal Section then **Share** (top of screen) **“With Committee Members.”**



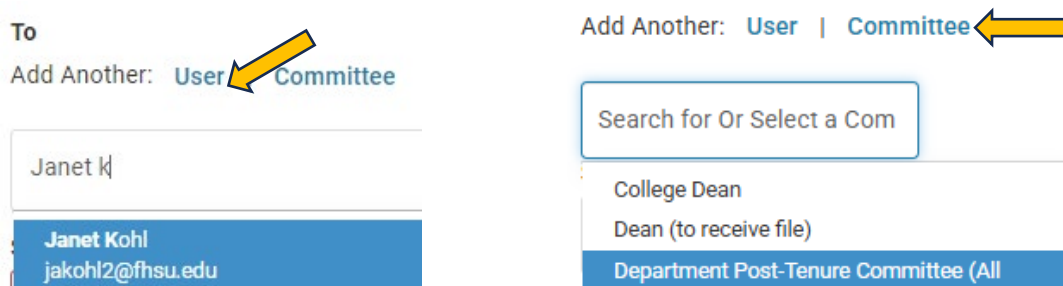
2. The “To” section will list members of your committee. **Delete these names** unless you intend to share the document with them as well.

### Message to Committee



3. **Add** committee chair, chair, admin assistant as appropriate for your review level. *With only two post-tenure reviewer levels, selecting by individual may be more efficient. Both individual & committee options are listed here.*

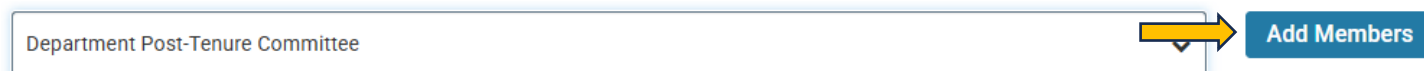
Select **“User”** and **type the individual’s name** to select from the Interfolio autogenerated list and/or, at dean level, Select **“Committee”** and **choose** from the drop-down list.



**Individuals:** After selecting name(s), **“Add User(s).”** Names will not be included if the “Add” step is skipped.



**Committees:** After selecting each committee, **“Add Members.”** Names will not be included if the “Add” step is skipped.



4. Check the **“To”** group to verify correct recipient list. **Delete** non-chairing committee members or errors as needed.



5. Continue with steps 4, 5, 7, and 8 of Candidate document-sharing process.

Sample text for Message to prior reviewers: The department committee's statement of findings has been uploaded to Dr. Doe's case. When logging into Interfolio, find the document under "Files have been shared with you."

**TIP:** This can be repeated as needed. If a required recipient was accidentally left off when sharing letters, the process above can be repeated with only that individual in the "To" group. Recipients are notified individually whether notice is sent to one person or a group.

Janet Kohl has shared files with you.

Recipient's email notice to view a shared letter:

[VIEW FILES](#)

You will be required to sign in to your account to view the shared files.

## Sending Case(s) forward to next review level (Committee Chair)

A. Sending a single case forward:

With case open, select **Send Case**, then **Forward to Dean** (the only "Forward" option).

Fort Hays State University > Cases >

### Victor E. Tiger

**Unit**  
Department of Health and Human Performance

**Template**  
Post-Tenure Review

**Send Case** ▾

Forward to Dean

In Post Tenure Review [change](#)

Whether sending one or multiple cases (see option B below), the next box indicates who will no longer have case access and who is gaining access. When sending multiple cases, all cases moving forward will be listed.

**Type subject line.** The Message contains Interfolio-generated wording. Leave as is or **edit as desired**.  
**Continue** to complete process and notify next reviewer(s). Cancel will back out of process.

### Send Case Forward

Great job! You're sending the case forward to the next step, Dean. The following reviewers will lose access to the case:

Department Post-Tenure Committee | 2 members

Dean (to receive file) | 1 members

The following reviewers will gain access to the case:

College Dean | 1 members

☒ Send a message to the reviewers gaining access.  
If recipients respond to this message, their response will come directly to your email inbox.

**Subject \***

Department Committee Review Complete

**Message \***

Dear committee members,

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,  
Janet Kohl

[Preview](#) [Continue](#) [Cancel](#)

B. Sending multiple cases simultaneously (*less common with post-tenure review*):

In Cases view

Select box next to each case

Select **Send Forward** in the top menu bar

Proceed in the same manner as sending a single case.

**REMINDER:** Load and share findings **before** moving case forward. See “Loading Statement of Findings,” “Sharing Statement of Findings with Candidate,” and “Sharing Statement of Findings with Others.”

If you are not being allowed to send the case forward, check for a missing document in **Case Details, Required Items**.

Case Materials Case Details 1

Required Items 1 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.

Department Committee Findings Add

per MOA Article X: Post-Tenure Review C.3.: The committee will review the faculty member's file and issue a written statement of its findings within two weeks. This statement will highlight exceptional performance, outline opportunities for improvement, and recommend actions for continued, long-term contribution as a member of the department and the university community. The review findings will remain with the file and the candidate and department chair will receive copies of the review findings.

No files have been added to this section.

The document was likely loaded to Case Materials instead of Case Details. See “Adding a required document to ...” below to add the statement of findings to Case Details.

Deans won't send cases forward since the dean is the last reviewer.

*These cases remain viewable in the dean's Cases tab until the Provost Office staff close all post-tenure cases after receiving deans' summary reports.*

## Uploaded Statement Troubleshooting

Correct loaded document title or move document to appropriate section

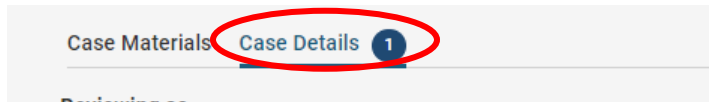
You can rename or move your uploaded statement any time you see “Edit” or the pencil icon . This may be needed when, for example, the dean's statement was saved in the department documents or the file name didn't include all required information. Simply **select Edit or the pencil** then **Edit Details or Edit Settings** to make corrections, and/or move statement to correct section, or delete the document.



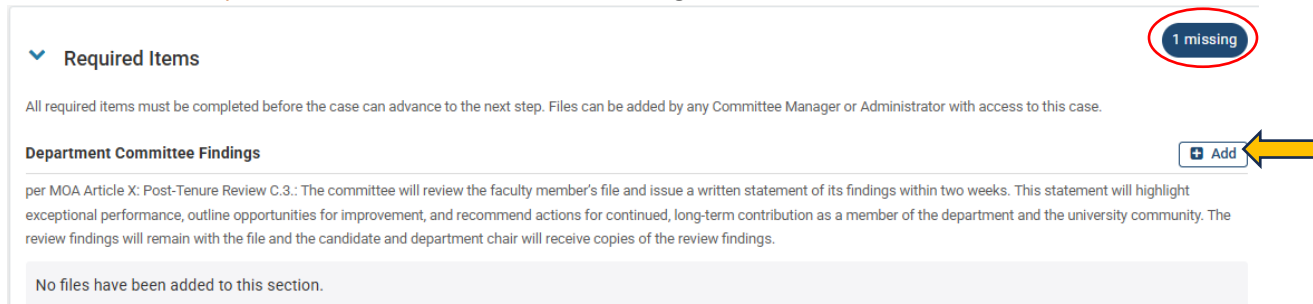
## Adding a required document to Case Details when it was initially loaded to Case Materials

If the statement was added to the case, but the Case Details tab still has a circled 1 next to it, the document was likely loaded to Case Materials *instead of* Required Items in Case Details. The case cannot be moved forward until Case Details Required Items are filled.

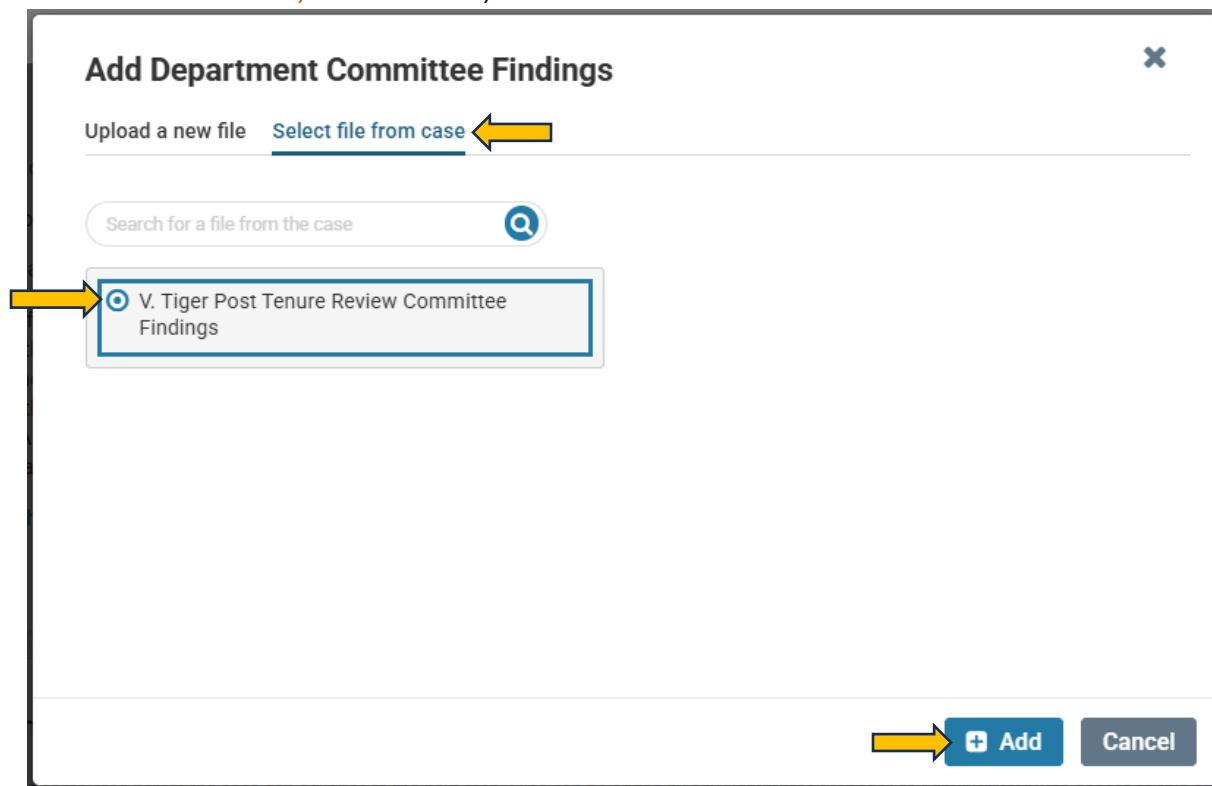
Click on **Case Details** tab,



Scroll down to **Required Items** and **+ Add** next to missing item.



“Select Files from Case,” select the file, then **+ Add**.



Next, open the selected document from Required Items to **verify it is the correct document**. This is especially important if any items are not clearly titled with review level.

Proceed with moving the case forward.

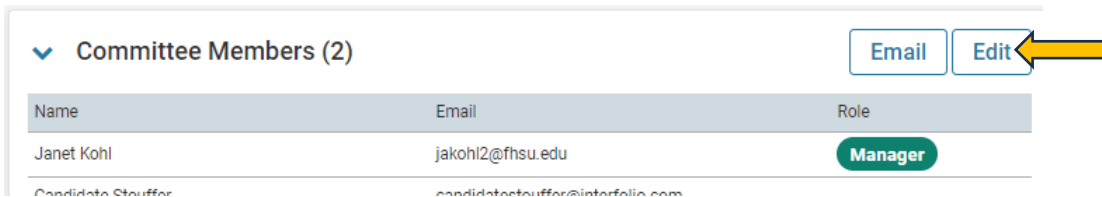
## Changing or adding committee manager access if needed

The committee chair is marked as “Manager” for access to complete Committee Manager tasks. When another committee member is designated as chair or is assisting with CM tasks, the committee chair or administrative assistant can add Manager access for that individual.

Scroll down to Committee Members under Case Details tab.

Case Materials **Case Details** 1

Select Edit.

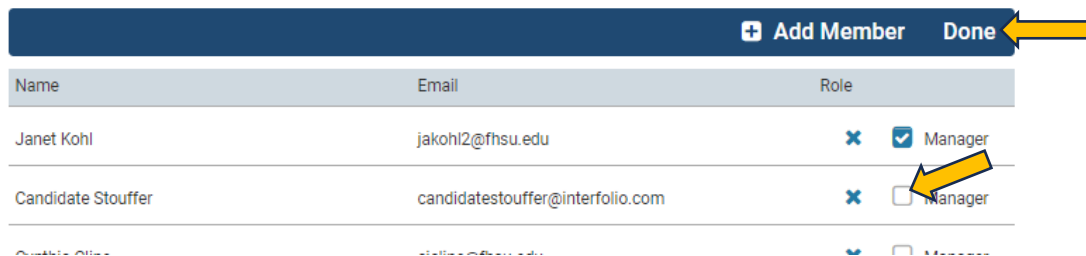


Committee Members (2)

Email Edit

Name	Email	Role
Janet Kohl	jakohl2@fhsu.edu	Manager
Candidate Stouffer	candidatestouffer@interfolio.com	

Check the Manager box next to the individual’s name, then Done.



+ Add Member Done

Name	Email	Role
Janet Kohl	jakohl2@fhsu.edu	<input checked="" type="checkbox"/> Manager
Candidate Stouffer	candidatestouffer@interfolio.com	<input type="checkbox"/> Manager
Candidate Stouffer	candidatestouffer@interfolio.com	<input type="checkbox"/> Manager

## Additional Tips

Reduce scrolling when selecting & sharing statement from the Internal section by toggling the Candidate Packet arrow to minimize that section.

☒ Candidate Packet ☐ Candidate Packet

Organize document-loading and sharing:

- Utilize Excel or other spreadsheet/note pad of choice to check off as documents are loaded and shared with candidate and reviewers.
- Save standard wording to copy and paste into required message(s).

Bookmark <https://www.fhsu.edu/academic/provost/digital-portfolio-system> for quick reference to log in and FAQs.

Refer to both Candidate and Reviewer FAQ's for answers to many common questions.

Resources: <https://www.fhsu.edu/academic/provost/digital-portfolio-system> (guides, training, reviewer FAQ)  
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