Interfolio basics

Electronic portfolios for CSUMB Retention, Tenure, and Promotion reviews

California State University
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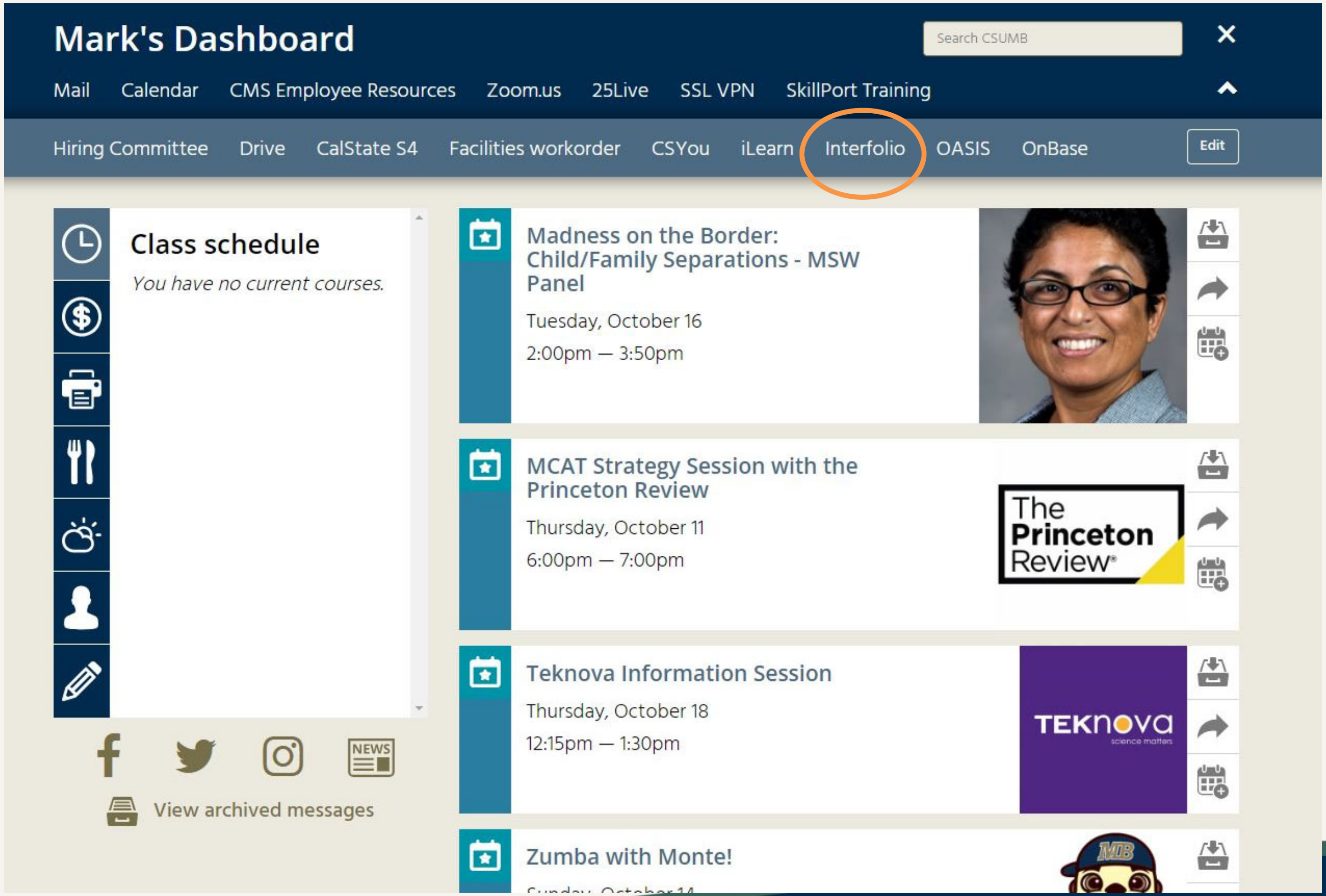
What is it?

- Dossier is a private repository for faculty documents
  - No storage limit
  - Can be used as staging area for reviews
- CSUMB section is for review processes
  - Faculty submit materials for review
  - Committee members review materials
- Cloud-based

User sign-in


Mark's Dashboard
Search CSUMB
Mail
Calendar
CMS Employee Resources
Zoom.us
25Live
SSL VPN
SkillPort Training
Hiring Committee
Drive
CalState S4
Facilities workorder
CSYou
iLearn
Interfolio
OASIS
OnBase
Edit
View archived messages

Class schedule

You have no current courses.

Madness on the Border: Child/Family Separations - MSW Panel

Tuesday, October 16

2:00pm — 3:50pm

MCAT Strategy Session with the Princeton Review

Thursday, October 11

6:00pm — 7:00pm

Teknova Information Session

Thursday, October 18

12:15pm — 1:30pm

Zumba with Monte!

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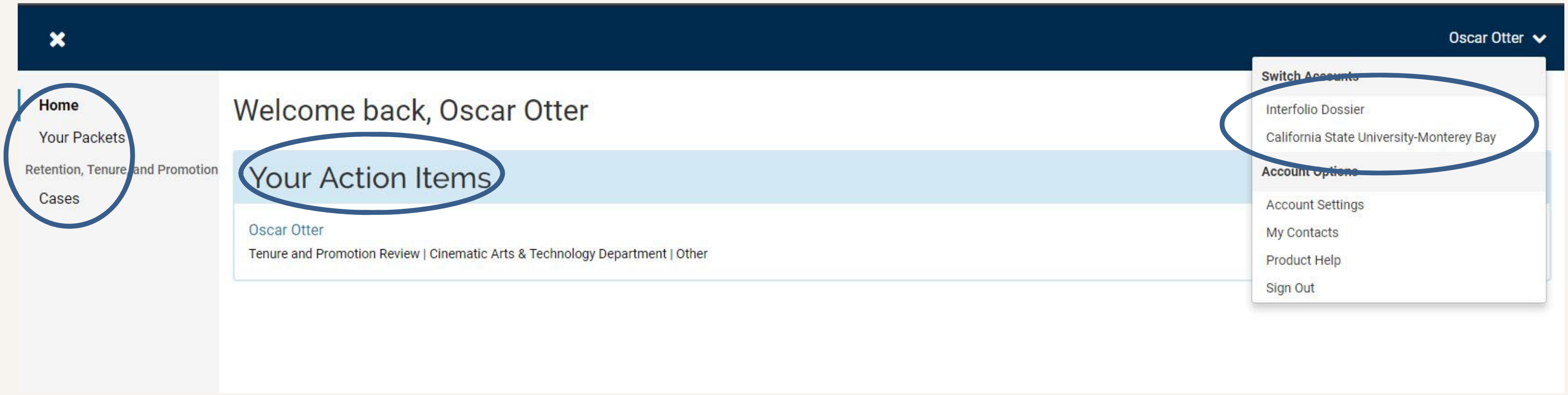
Home page


Oscar Otter
Home
Your Packets
Retention, Tenure and Promotion
Cases
Switch Accounts
Interfolio Dossier
California State University-Monterey Bay
Account Options
Account Settings
My Contacts
Product Help
Sign Out

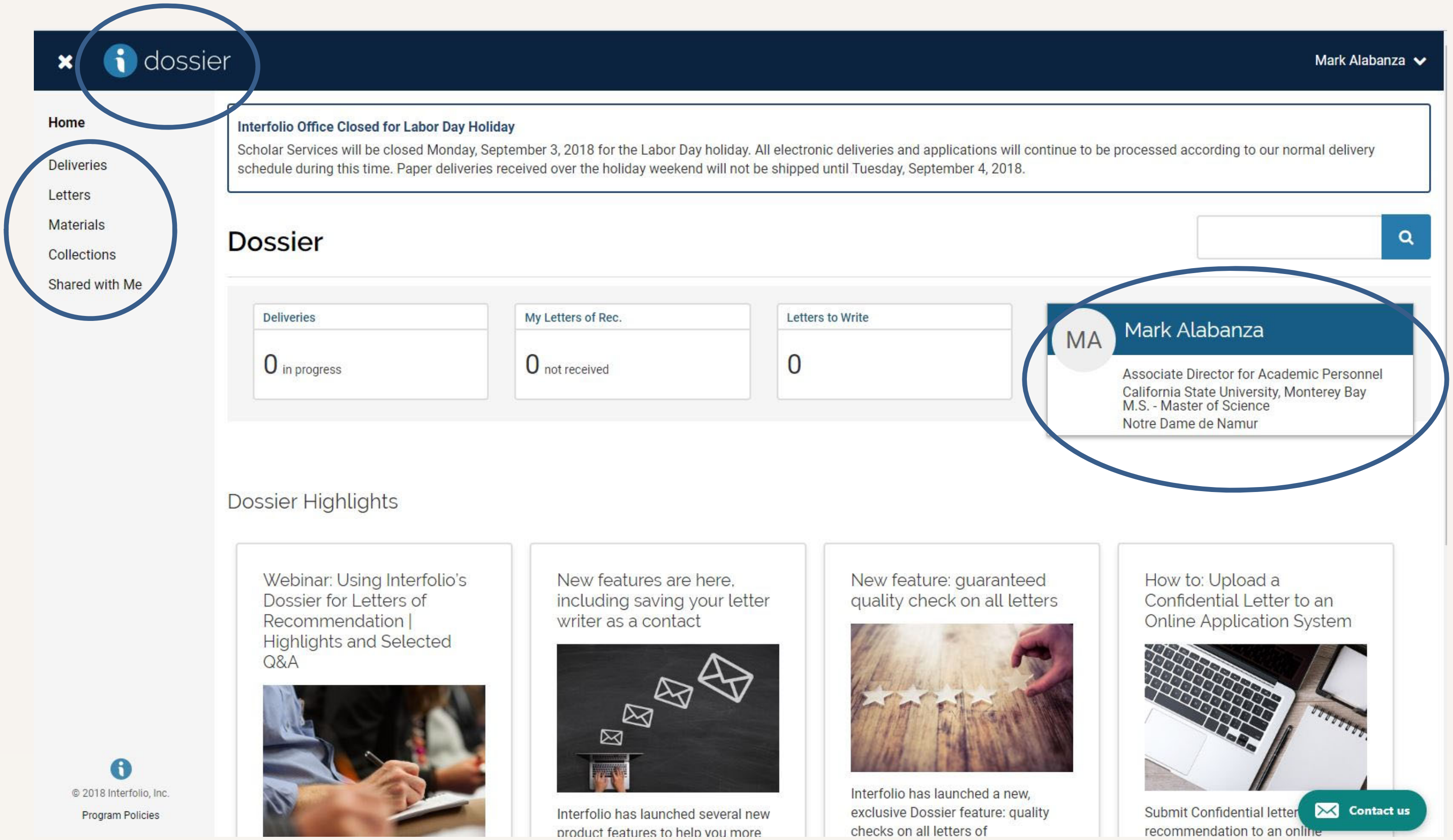
Welcome back, Oscar Otter

Your Action Items

Oscar Otter

Tenure and Promotion Review | Cinematic Arts & Technology Department | Other

Dossier



Interfolio Office Closed for Labor Day Holiday

Scholar Services will be closed Monday, September 3, 2018 for the Labor Day holiday. All electronic deliveries and applications will continue to be processed according to our normal delivery schedule during this time. Paper deliveries received over the holiday weekend will not be shipped until Tuesday, September 4, 2018.

Dossier

Deliveries: 0 in progress

My Letters of Rec.: 0 not received

Letters to Write: 0

MA Mark Alabanza

Associate Director for Academic Personnel
California State University, Monterey Bay
M.S. - Master of Science
Notre Dame de Namur

Dossier Highlights

Webinar: Using Interfolio's Dossier for Letters of Recommendation | Highlights and Selected Q&A

New features are here, including saving your letter writer as a contact

Interfolio has launched several new product features to help you more

New feature: guaranteed quality check on all letters

Interfolio has launched a new, exclusive Dossier feature: quality checks on all letters of

How to: Upload a Confidential Letter to an Online Application System

Submit Confidential letter recommendation to an online

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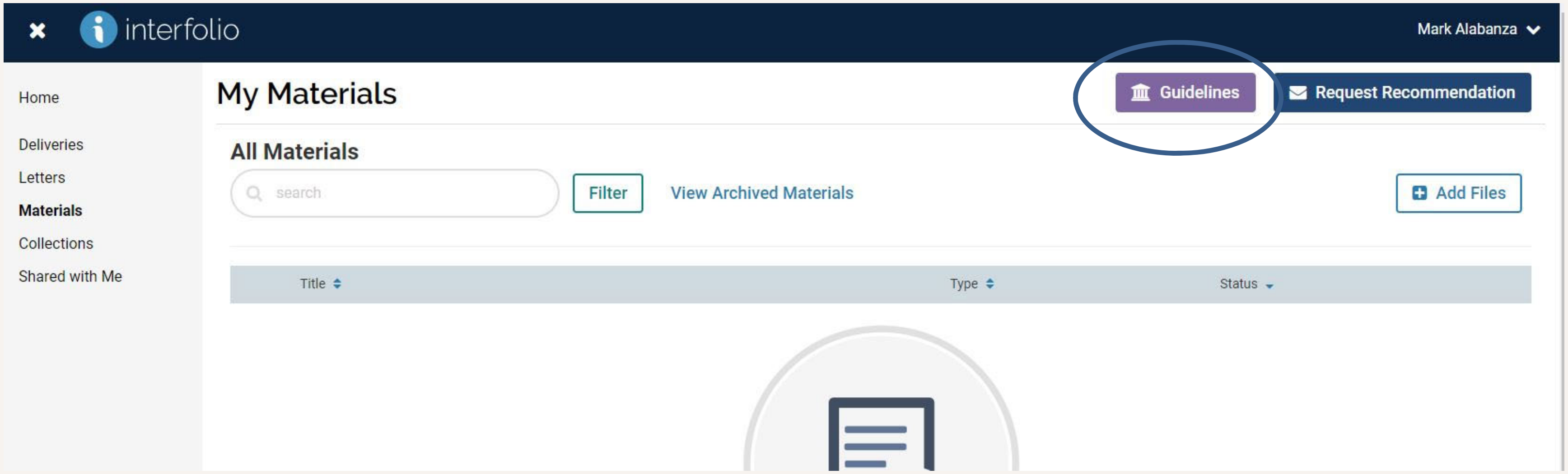
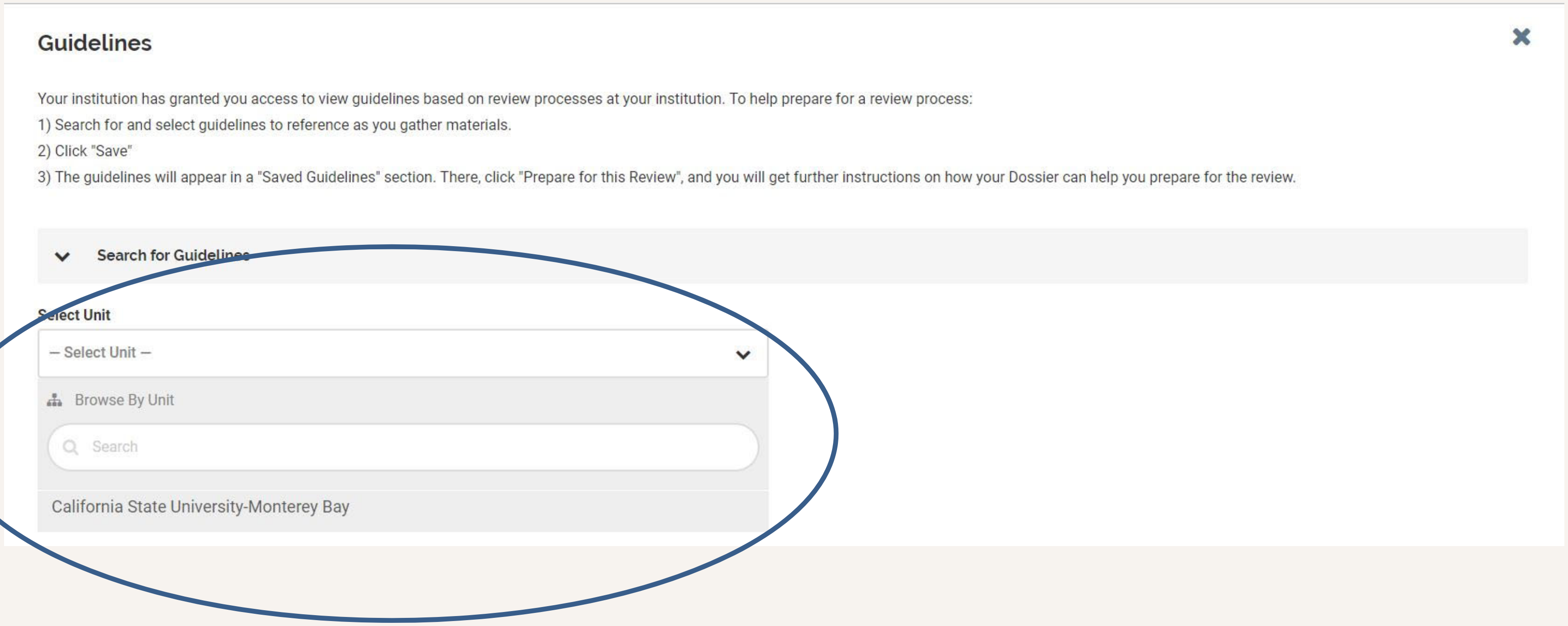
Program Policies

Materials


interfolio
Mark Alabanza
Home
Deliveries
Letters
Materials
Collections
Shared with Me
My Materials
Guidelines
Request Recommendation
All Materials
search
Filter
View Archived Materials
Add Files
Title
Type
Status

Guidelines



Guidelines

Your institution has granted you access to view guidelines based on review processes at your institution. To help prepare for a review process:

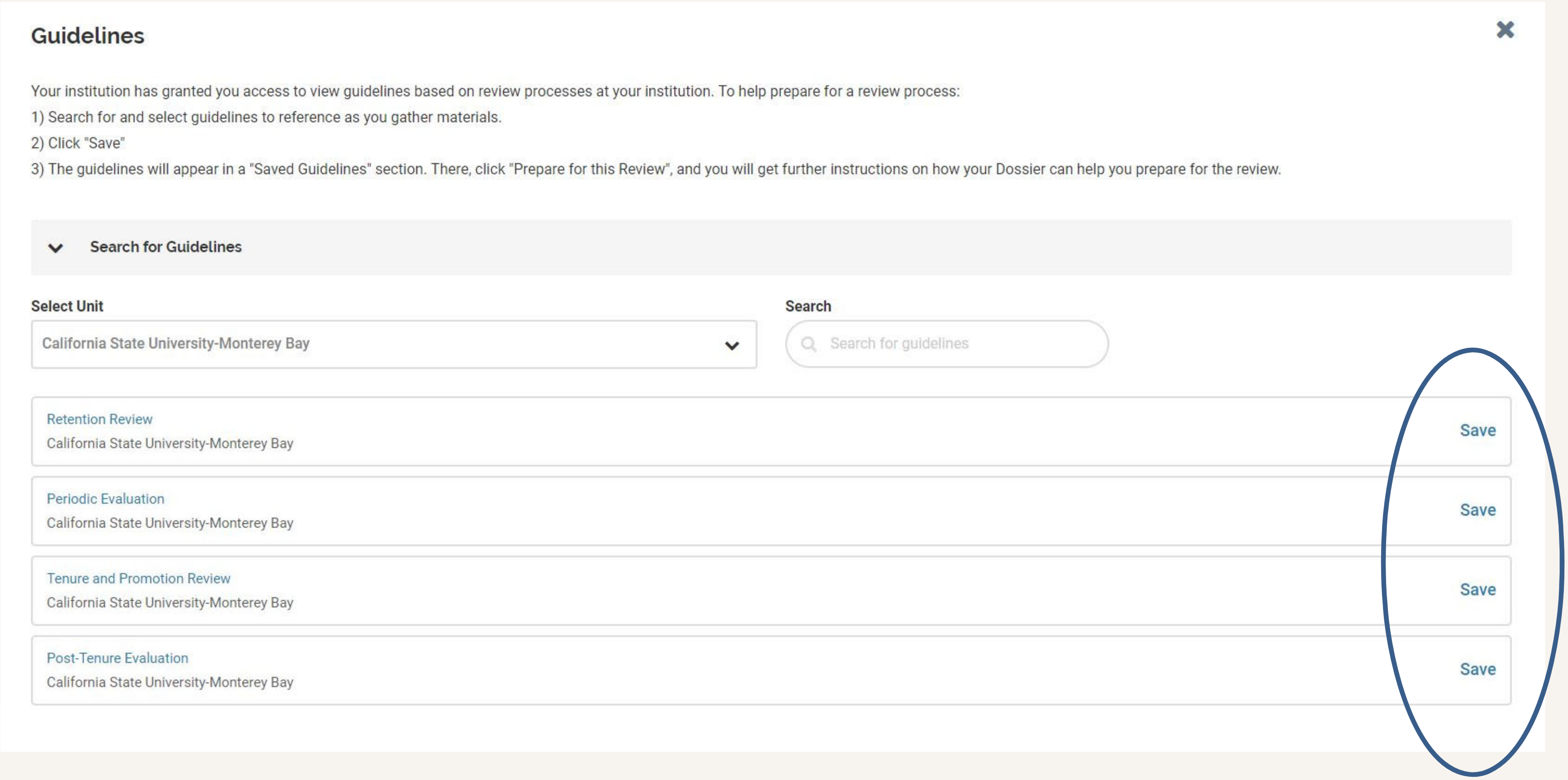
1) Search for and select guidelines to reference as you gather materials.

2) Click "Save"

3) The guidelines will appear in a "Saved Guidelines" section. There, click "Prepare for this Review", and you will get further instructions on how your Dossier can help you prepare for the review.

Search for Guidelines
Select Unit
– Select Unit –
Browse By Unit
Search
California State University-Monterey Bay

Guidelines (cont.)



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3) The guidelines will appear in a "Saved Guidelines" section. There, click "Prepare for this Review", and you will get further instructions on how your Dossier can help you prepare for the review.

Search for Guidelines

Select Unit: California State University-Monterey Bay

Search: Search for guidelines

Retention Review California State University-Monterey Bay	Save
Periodic Evaluation California State University-Monterey Bay	Save
Tenure and Promotion Review California State University-Monterey Bay	Save
Post-Tenure Evaluation California State University-Monterey Bay	Save

California State University
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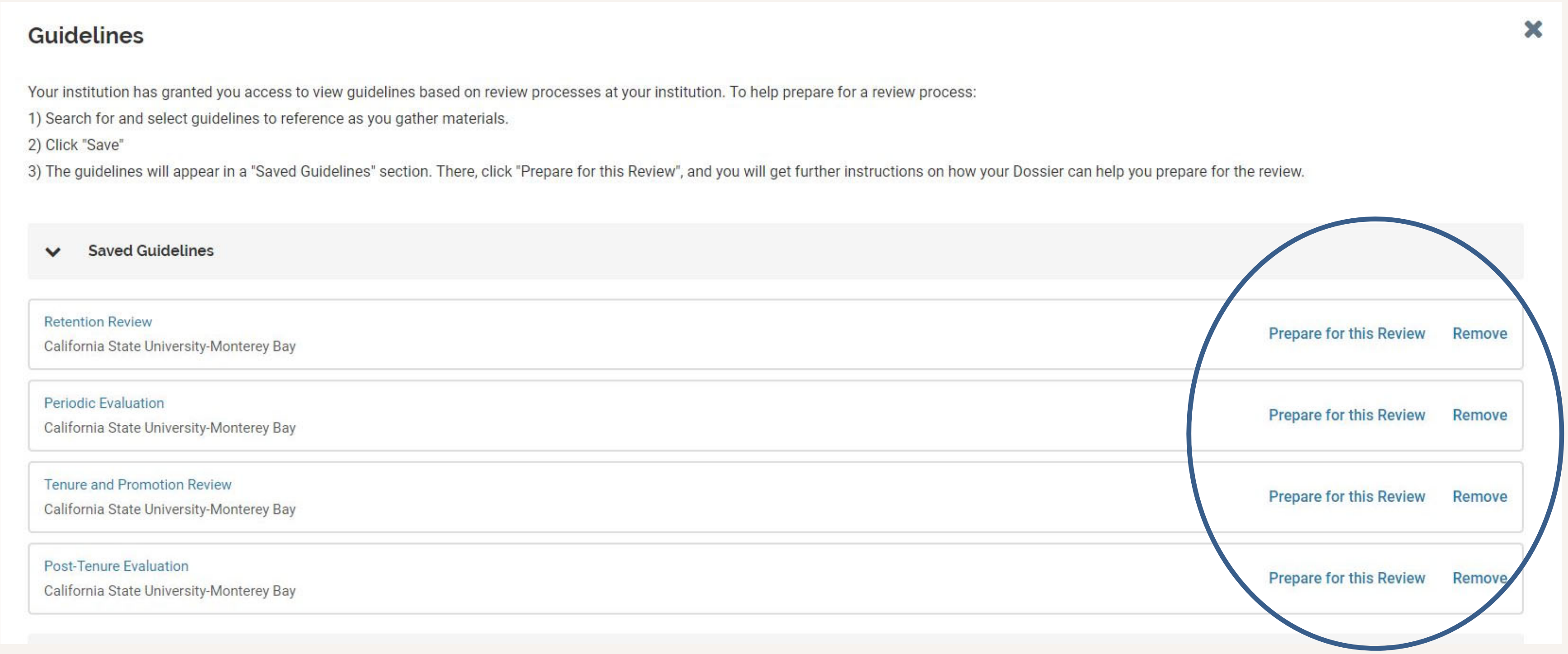
Guidelines (cont.)



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Saved Guidelines

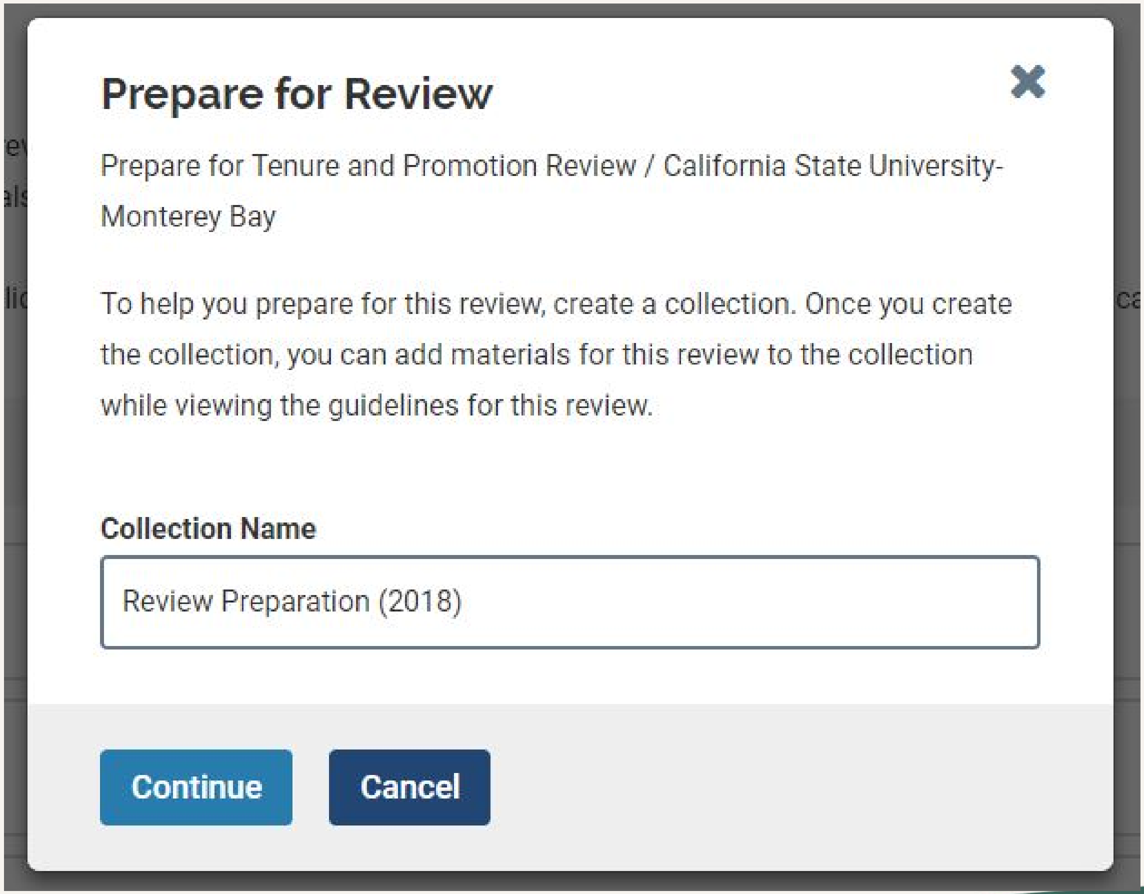
Retention Review
California State University-Monterey Bay
Prepare for this Review
Remove

Periodic Evaluation
California State University-Monterey Bay
Prepare for this Review
Remove

Tenure and Promotion Review
California State University-Monterey Bay
Prepare for this Review
Remove

Post-Tenure Evaluation
California State University-Monterey Bay
Prepare for this Review
Remove

Guidelines (cont.)



Prepare for Review

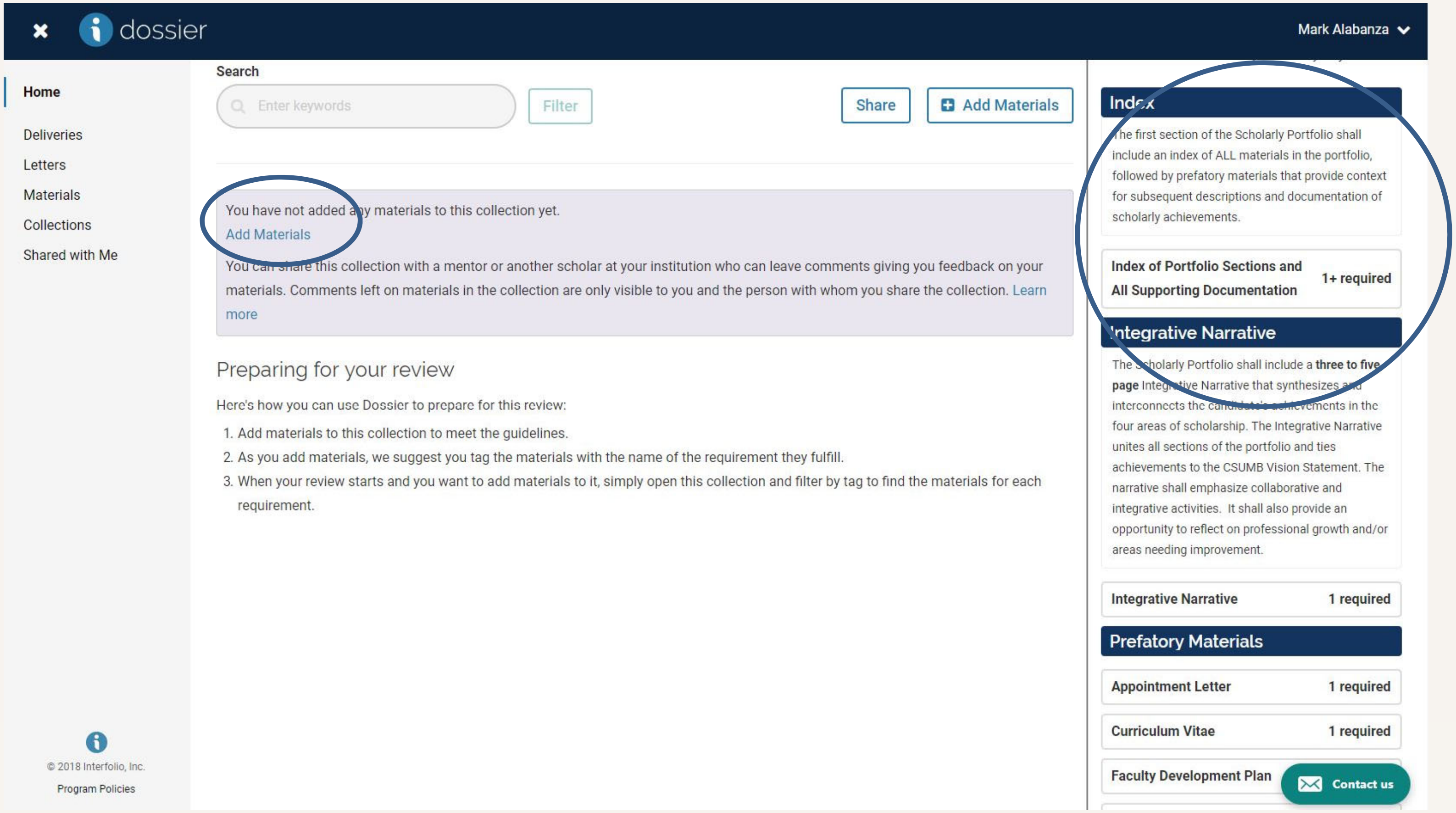
Prepare for Tenure and Promotion Review / California State University-Monterey Bay

To help you prepare for this review, create a collection. Once you create the collection, you can add materials for this review to the collection while viewing the guidelines for this review.

Collection Name

Review Preparation (2018)

Materials (cont.)



You have not added any materials to this collection yet.
Add Materials

You can share this collection with a mentor or another scholar at your institution who can leave comments giving you feedback on your materials. Comments left on materials in the collection are only visible to you and the person with whom you share the collection. Learn more

Preparing for your review

Here's how you can use Dossier to prepare for this review:

1. Add materials to this collection to meet the guidelines.
2. As you add materials, we suggest you tag the materials with the name of the requirement they fulfill.
3. When your review starts and you want to add materials to it, simply open this collection and filter by tag to find the materials for each requirement.

Index

The first section of the Scholarly Portfolio shall include an index of ALL materials in the portfolio, followed by prefatory materials that provide context for subsequent descriptions and documentation of scholarly achievements.

Index of Portfolio Sections and All Supporting Documentation	**1+ required**

Integrative Narrative

The Scholarly Portfolio shall include a **three to five page** Integrative Narrative that synthesizes and interconnects the candidate's achievements in the four areas of scholarship. The Integrative Narrative unites all sections of the portfolio and ties achievements to the CSUMB Vision Statement. The narrative shall emphasize collaborative and integrative activities. It shall also provide an opportunity to reflect on professional growth and/or areas needing improvement.

Integrative Narrative	**1 required**

Prefatory Materials

Appointment Letter	**1 required**
Curriculum Vitae	**1 required**
Faculty Development Plan	

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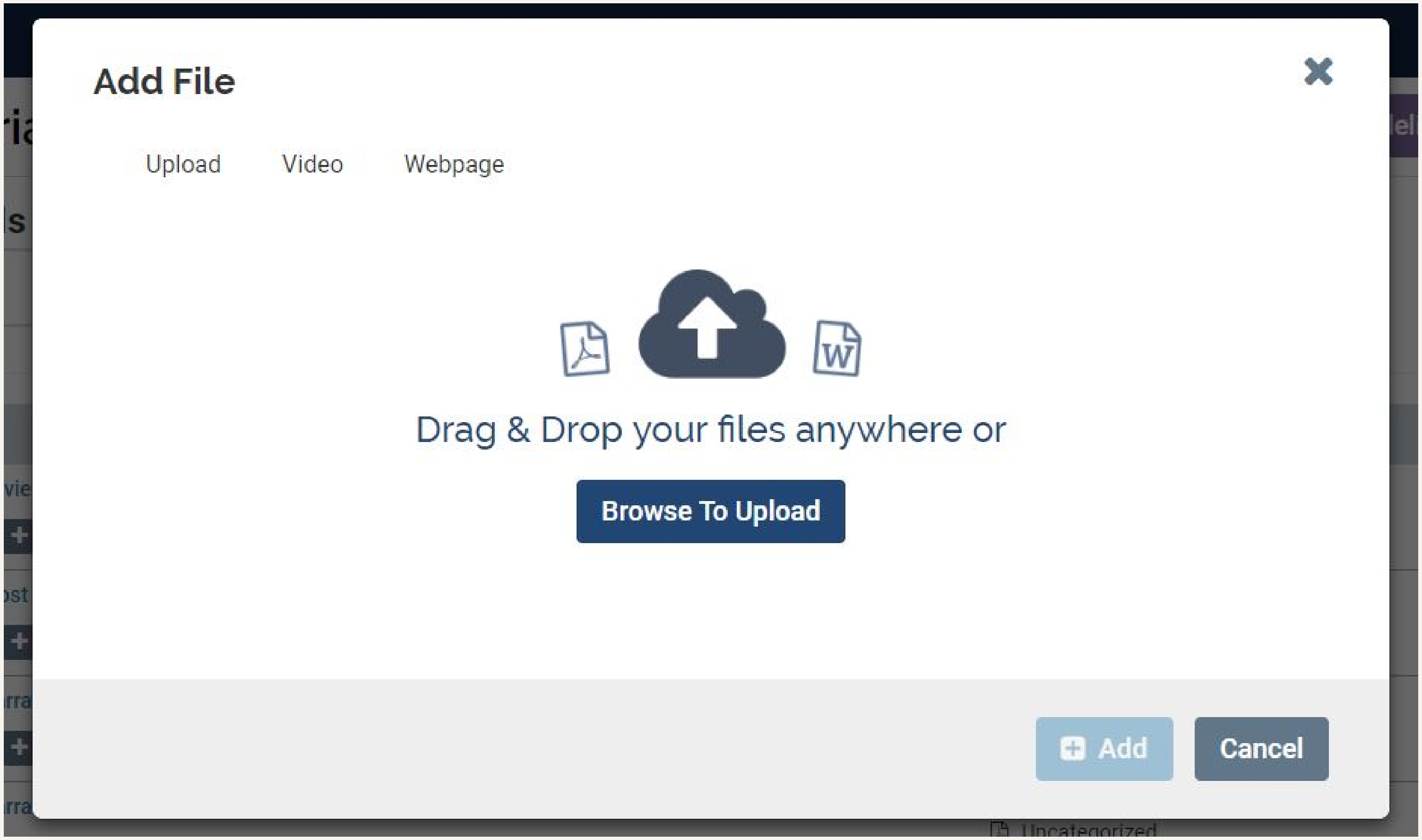
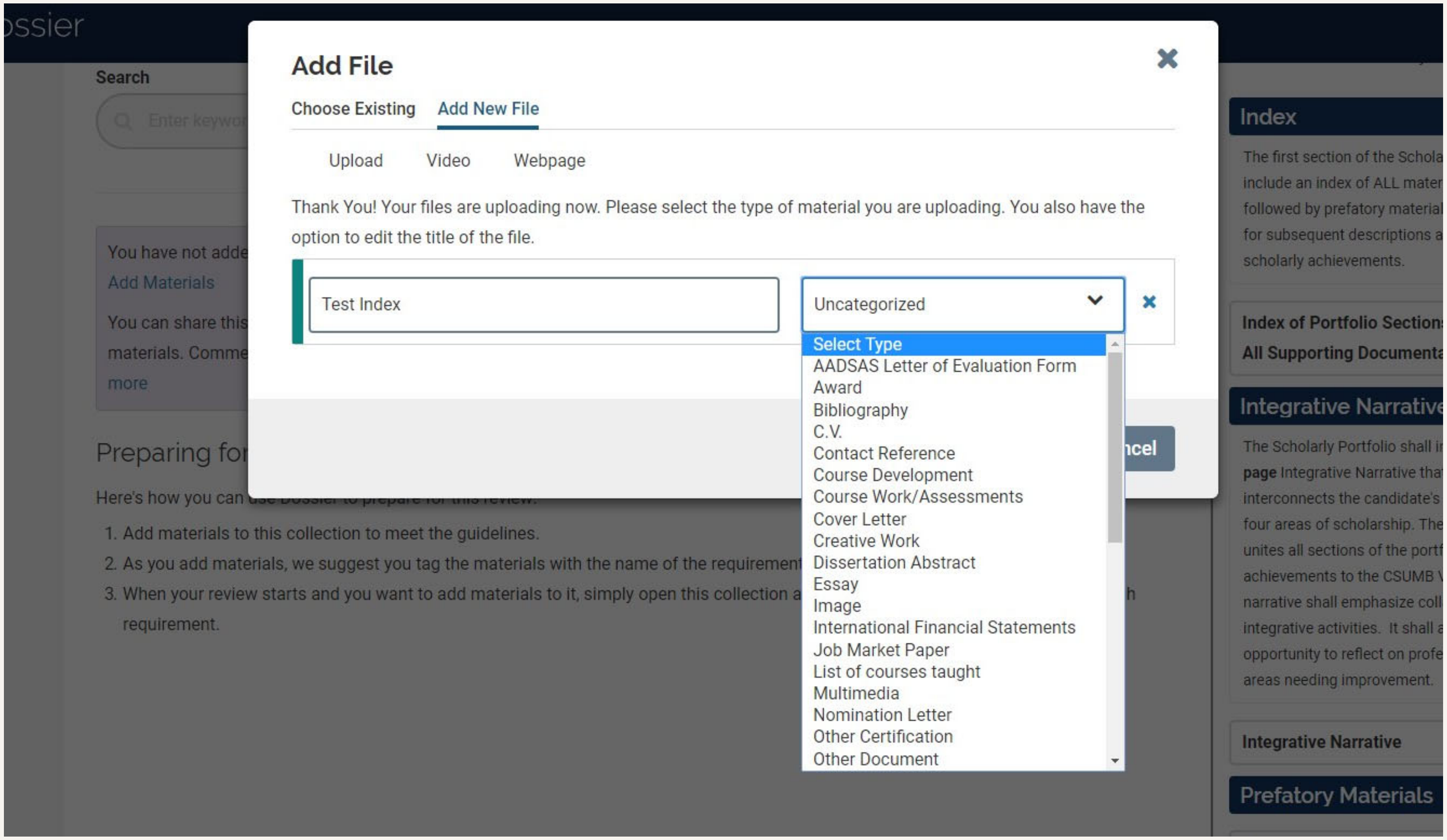
Materials (cont.)


Add File
Upload
Video
Webpage
Drag & Drop your files anywhere or
Browse To Upload
Add
Cancel
Uncategorized

Materials (cont.)

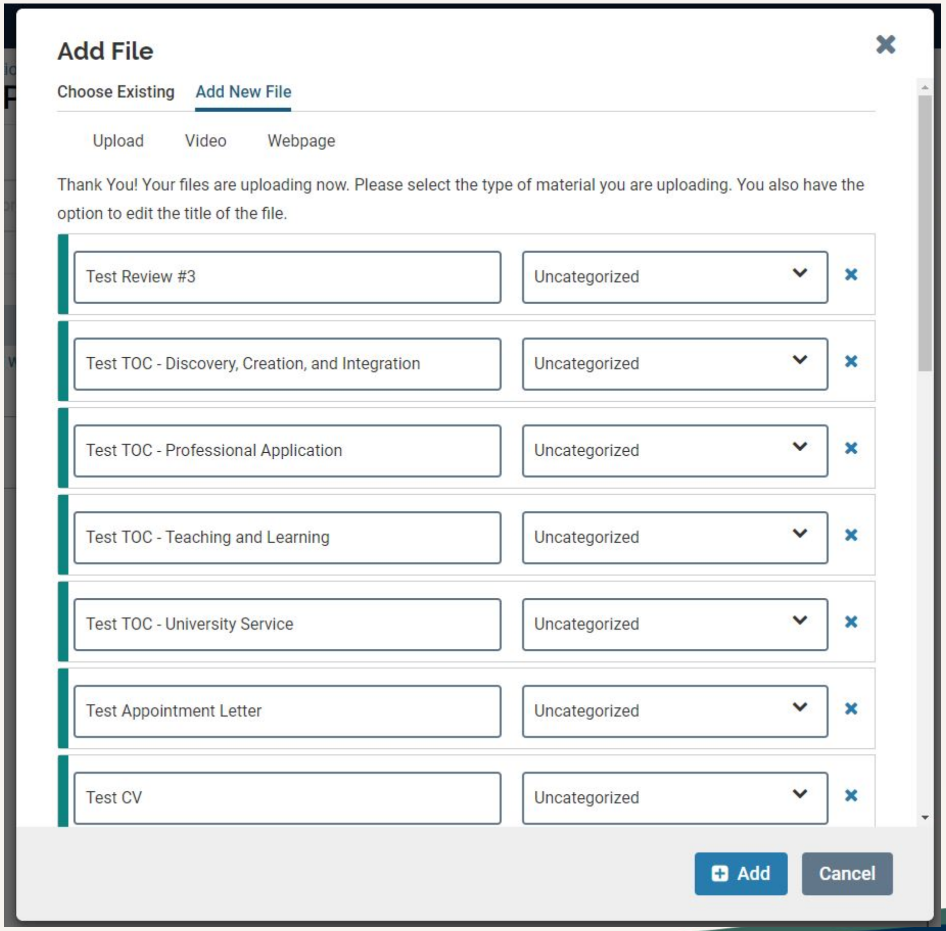

ssier
Search
Enter keywor
Add File
Choose Existing
Add New File
Upload
Video
Webpage
Select Type
AADSAS Letter of Evaluation Form
Award
Bibliography
C.V.
Contact Reference
Course Development
Course Work/Assessments
Cover Letter
Creative Work
Dissertation Abstract
Essay
Image
International Financial Statements
Job Market Paper
List of courses taught
Multimedia
Nomination Letter
Other Certification
Other Document
ncel
Index
Index of Portfolio Section
All Supporting Documenta
Integrative Narrative
Integrative Narrative
Prefatory Materials

Add File

Thank You! Your files are uploading now. Please select the type of material you are uploading. You also have the option to edit the title of the file.

Test Index | Uncategorized

Materials (cont.)

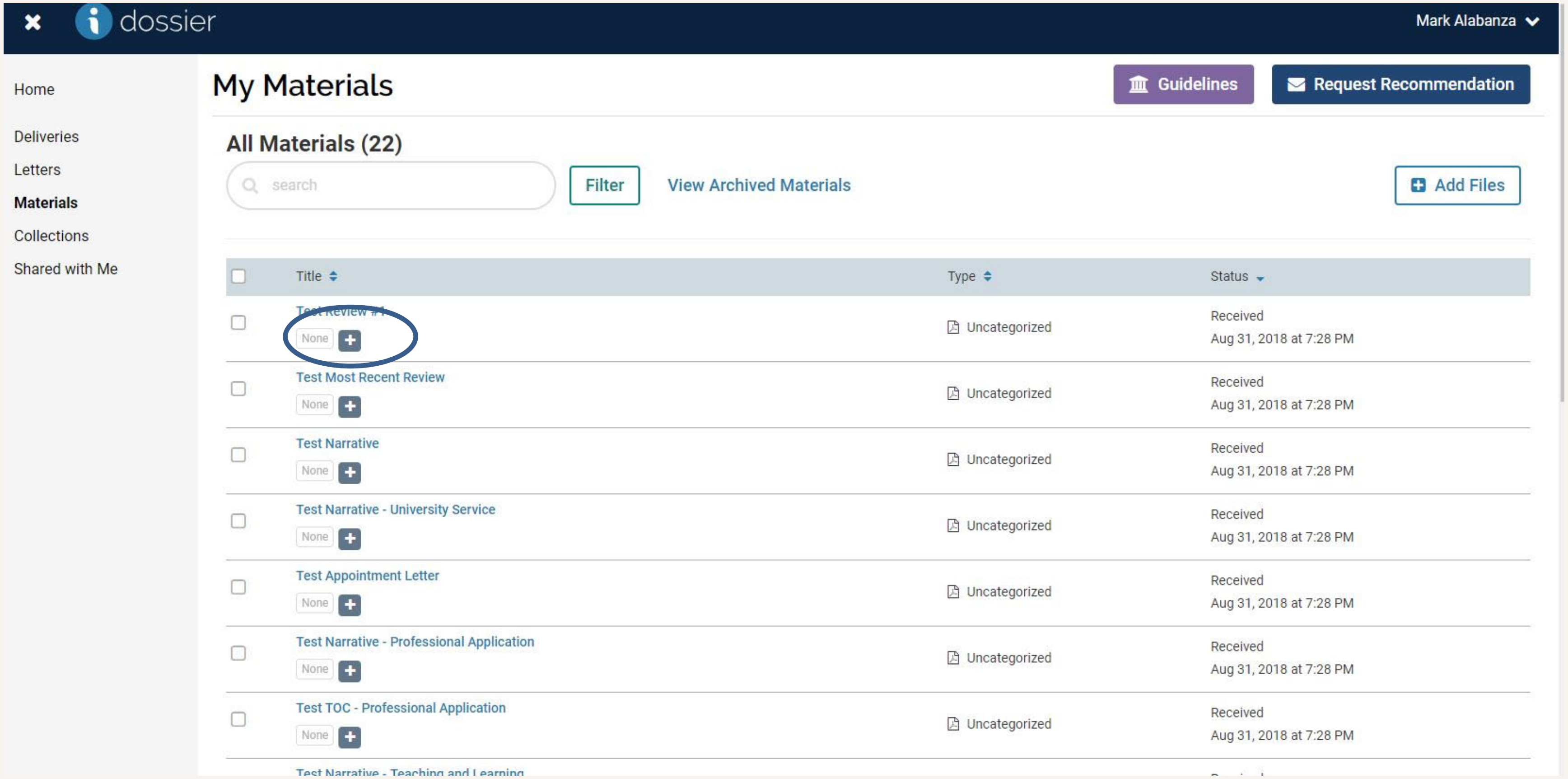


Add File
Choose Existing
Add New File
Upload
Video
Webpage

Thank You! Your files are uploading now. Please select the type of material you are uploading. You also have the option to edit the title of the file.

Test Review #3	Uncategorized	✖
Test TOC - Discovery, Creation, and Integration	Uncategorized	✖
Test TOC - Professional Application	Uncategorized	✖
Test TOC - Teaching and Learning	Uncategorized	✖
Test TOC - University Service	Uncategorized	✖
Test Appointment Letter	Uncategorized	✖
Test CV	Uncategorized	✖

Materials (cont.)


dossier
Mark Alabanza
Home
Deliveries
Letters
Materials
Collections
Shared with Me
Guidelines
Request Recommendation
search
Filter
View Archived Materials
Add Files

My Materials

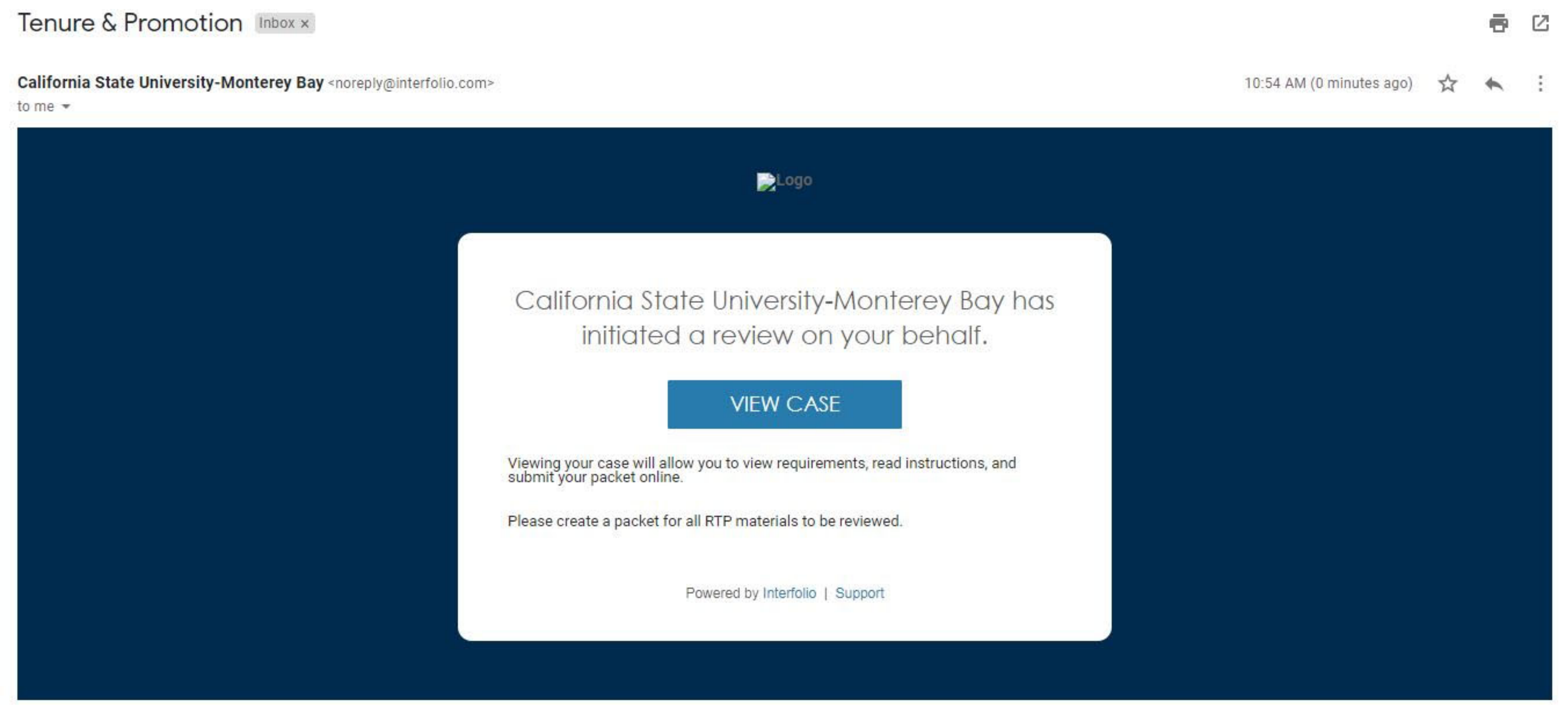
All Materials (22)

☐	Title	Type	Status
☐	Test Review #1 None +	Uncategorized	Received Aug 31, 2018 at 7:28 PM
☐	Test Most Recent Review None +	Uncategorized	Received Aug 31, 2018 at 7:28 PM
☐	Test Narrative None +	Uncategorized	Received Aug 31, 2018 at 7:28 PM
☐	Test Narrative - University Service None +	Uncategorized	Received Aug 31, 2018 at 7:28 PM
☐	Test Appointment Letter None +	Uncategorized	Received Aug 31, 2018 at 7:28 PM
☐	Test Narrative - Professional Application None +	Uncategorized	Received Aug 31, 2018 at 7:28 PM
☐	Test TOC - Professional Application None +	Uncategorized	Received Aug 31, 2018 at 7:28 PM
	Test Narrative - Teaching and Learning		

Ready to add documents

- Your documents are now saved in the Dossier and may be accessed when creating your packet for review

Notification



Tenure & Promotion

California State University-Monterey Bay <noreply@interfolio.com>

to me

10:54 AM (0 minutes ago)

California State University-Monterey Bay has initiated a review on your behalf.

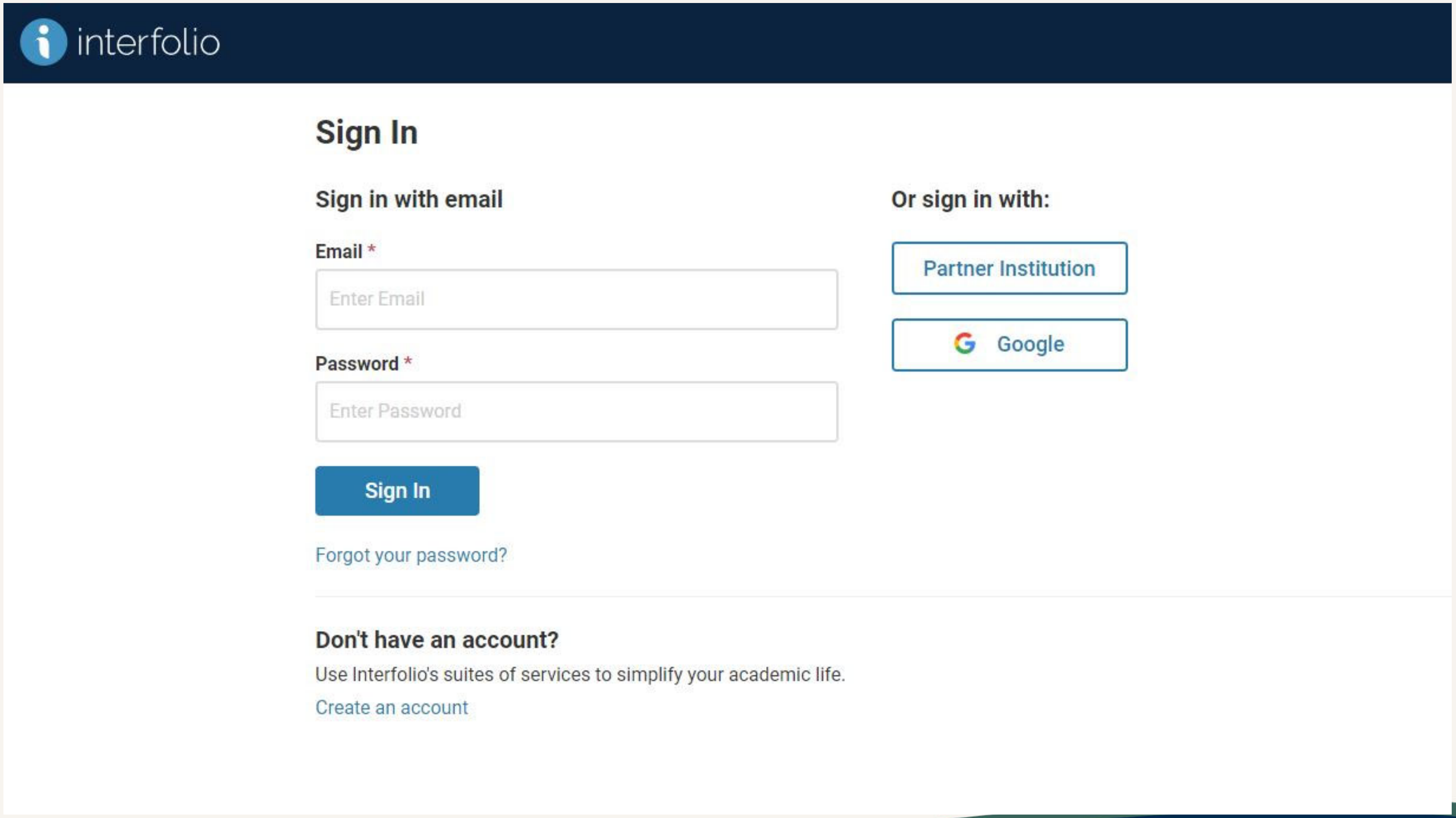
VIEW CASE

Viewing your case will allow you to view requirements, read instructions, and submit your packet online.

Please create a packet for all RTP materials to be reviewed.

Powered by Interfolio | Support

User sign-in



interfolio

Sign In

Sign in with email

Email *

Enter Email

Password *

Enter Password

Sign In

Forgot your password?

Or sign in with:

Partner Institution

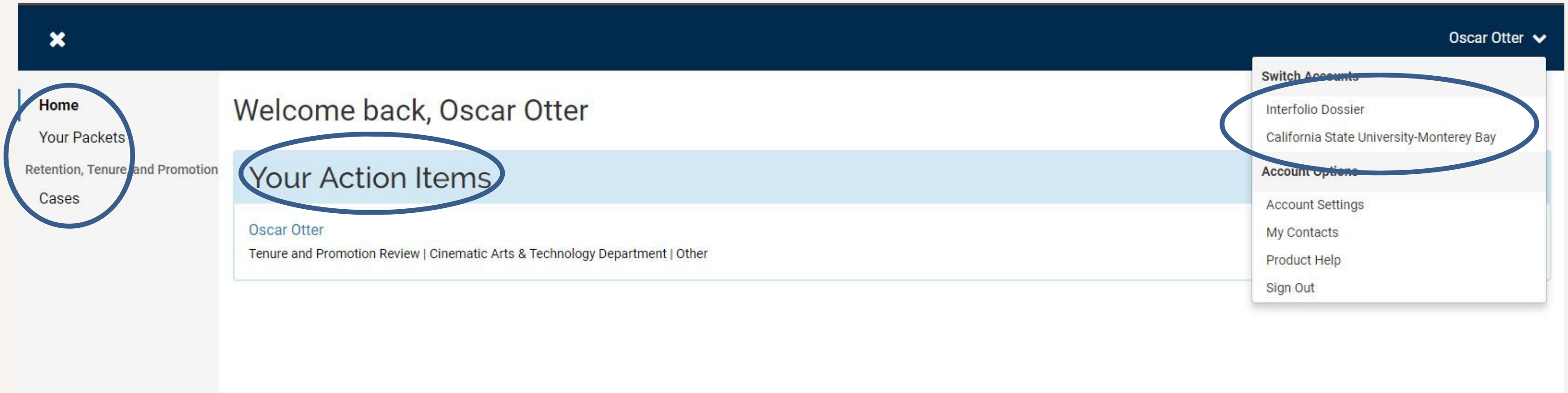
Google

Don't have an account?

Use Interfolio's suites of services to simplify your academic life.

Create an account

Home page


Oscar Otter
Home
Your Packets
Retention, Tenure and Promotion
Cases
Switch Accounts
Interfolio Dossier
California State University-Monterey Bay
Account Options
Account Settings
My Contacts
Product Help
Sign Out

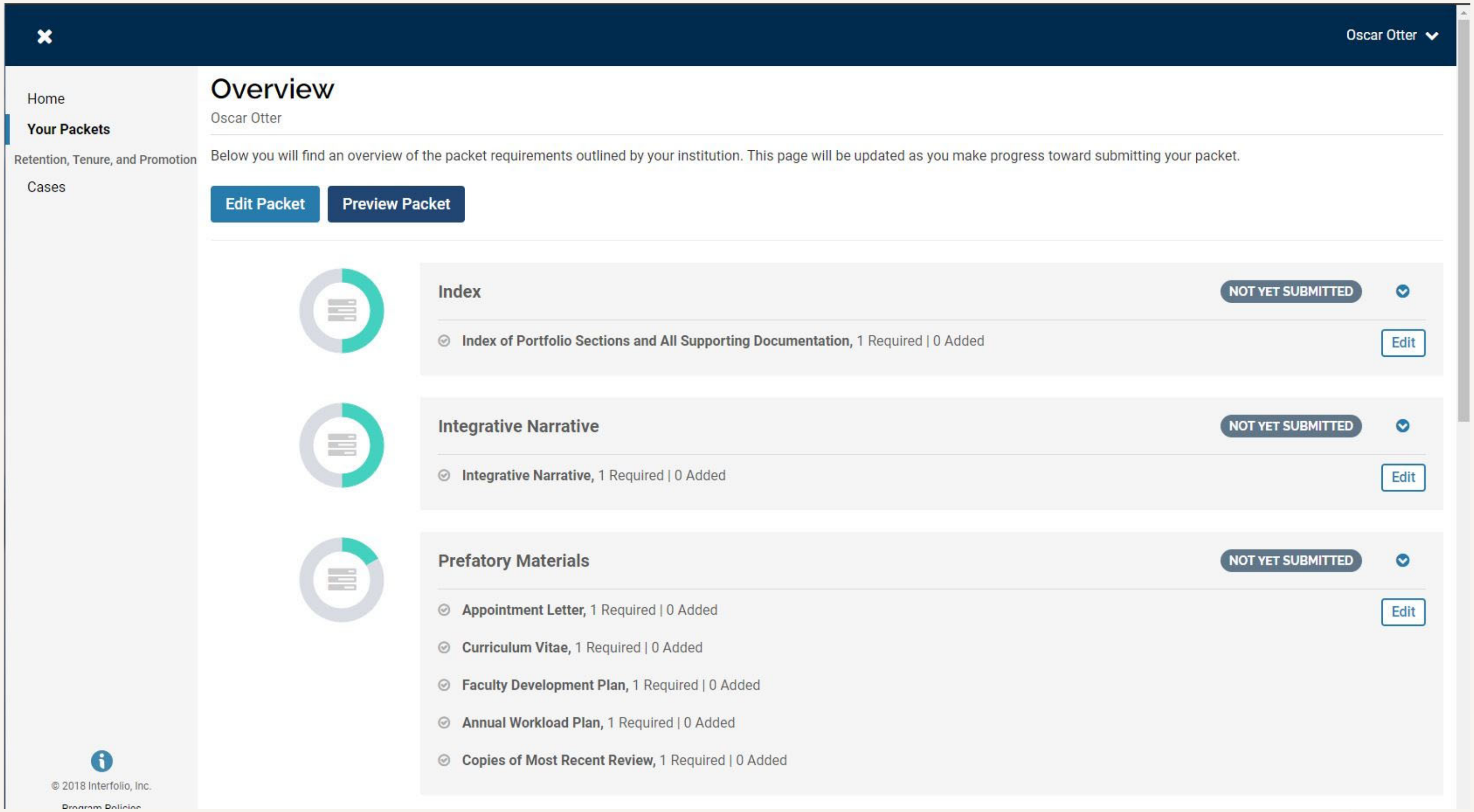
Welcome back, Oscar Otter

Your Action Items

Oscar Otter

Tenure and Promotion Review | Cinematic Arts & Technology Department | Other

Packet overview


Oscar Otter
Home
Your Packets
Retention, Tenure, and Promotion
Cases

Overview

Oscar Otter

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward submitting your packet.

Edit Packet
Preview Packet

Index NOT YET SUBMITTED

- **Index of Portfolio Sections and All Supporting Documentation,** 1 Required | 0 Added

Edit

Integrative Narrative NOT YET SUBMITTED

- **Integrative Narrative,** 1 Required | 0 Added

Prefatory Materials NOT YET SUBMITTED

- **Appointment Letter,** 1 Required | 0 Added
- **Curriculum Vitae,** 1 Required | 0 Added
- **Faculty Development Plan,** 1 Required | 0 Added
- **Annual Workload Plan,** 1 Required | 0 Added
- **Copies of Most Recent Review,** 1 Required | 0 Added

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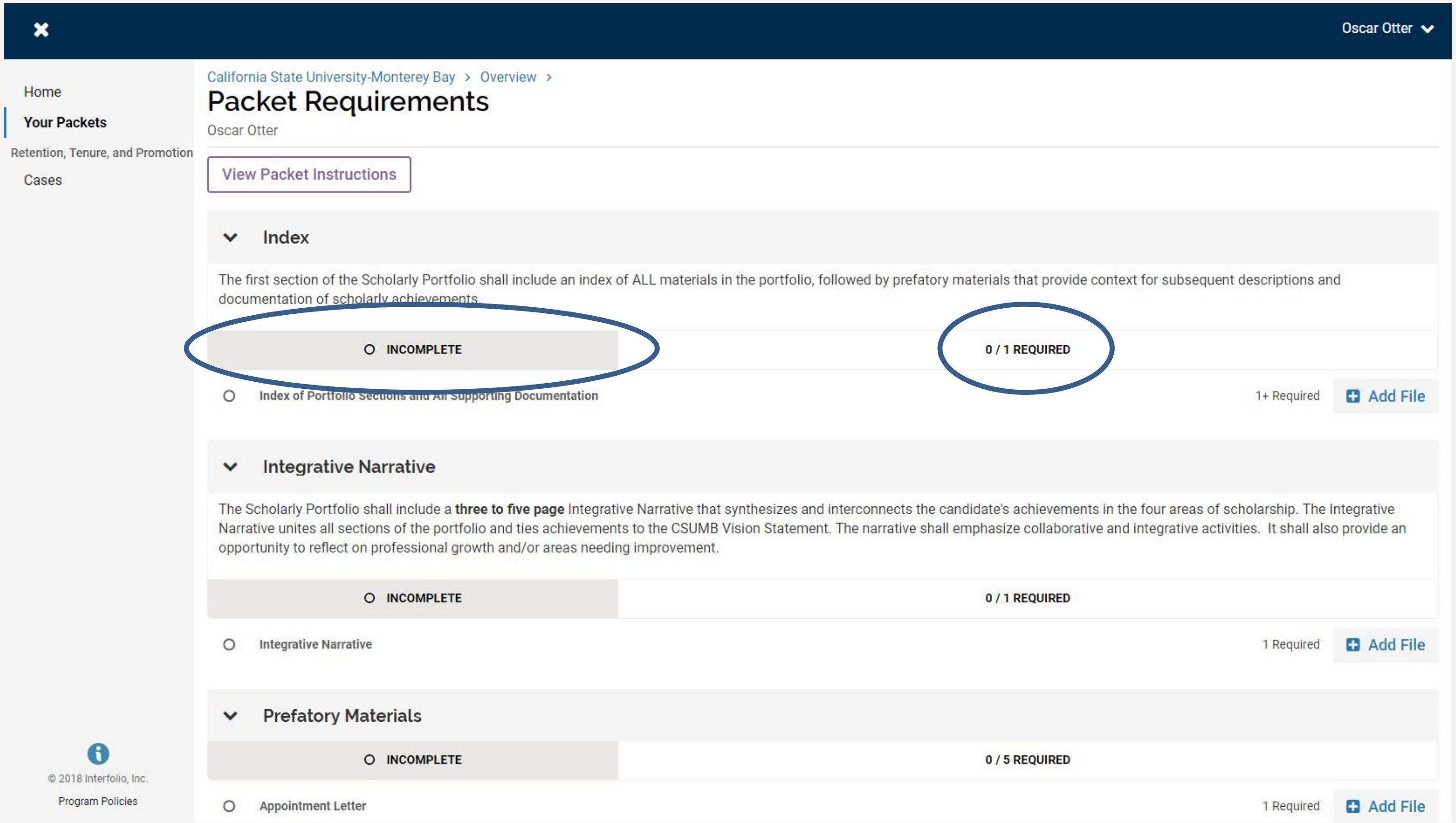
Program Policies

Edit packet



✖
Oscar Otter
Home
Your Packets
Retention, Tenure, and Promotion
Cases

California State University-Monterey Bay > Overview >

Packet Requirements

Oscar Otter

View Packet Instructions

Index

The first section of the Scholarly Portfolio shall include an index of ALL materials in the portfolio, followed by prefatory materials that provide context for subsequent descriptions and documentation of scholarly achievements.

○ INCOMPLETE | 0 / 1 REQUIRED

○ Index of Portfolio Sections and All Supporting Documentation | 1+ Required | Add File

Integrative Narrative

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○ INCOMPLETE | 0 / 1 REQUIRED

○ Integrative Narrative | 1 Required | Add File

Prefatory Materials

○ INCOMPLETE | 0 / 5 REQUIRED

○ Appointment Letter | 1 Required | Add File

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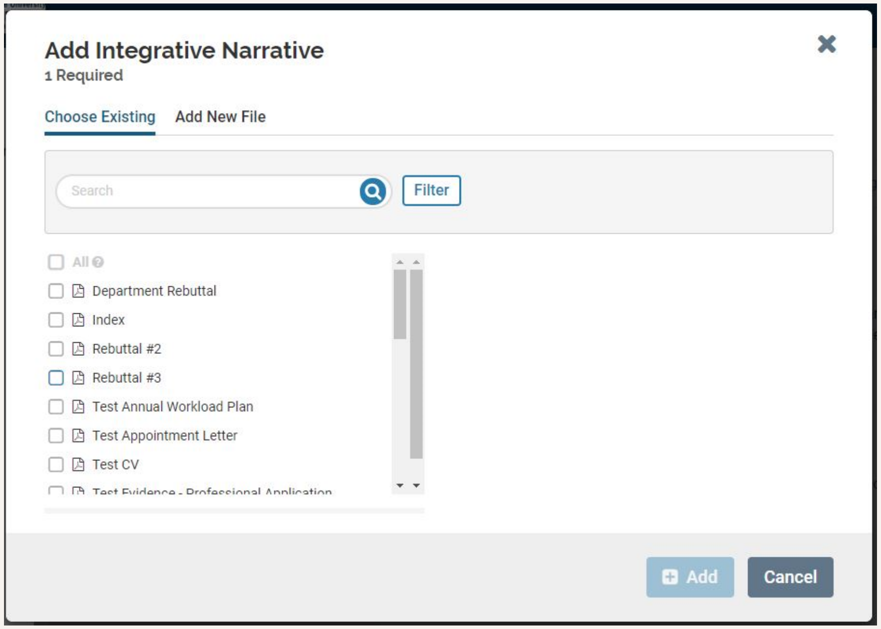
Program Policies

Select materials

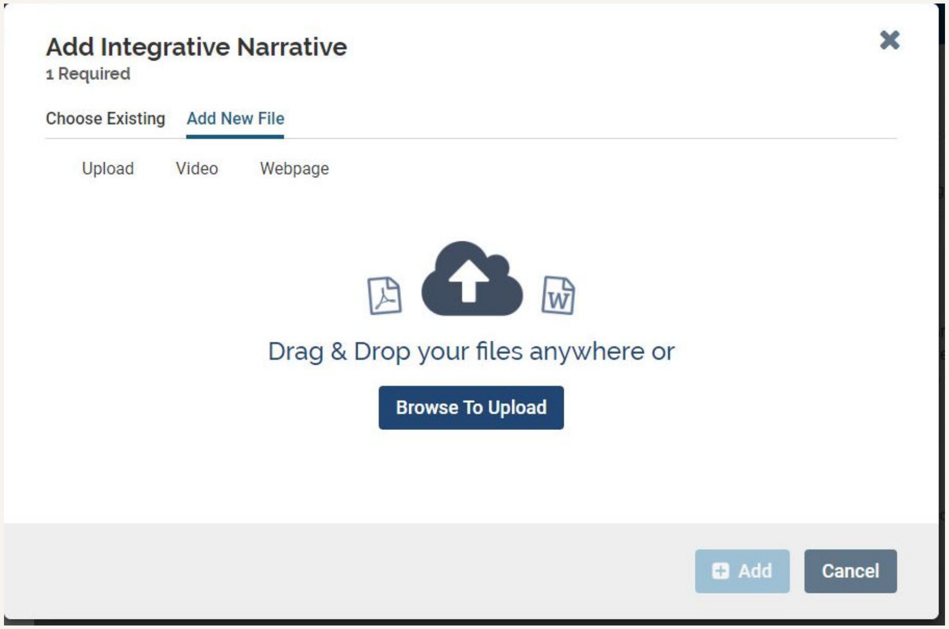


Add Integrative Narrative
1 Required

Choose Existing
Add New File
Search
Filter

- ☐ All
- ☐ Department Rebuttal
- ☐ Index
- ☐ Rebuttal #2
- ☐ Rebuttal #3
- ☐ Test Annual Workload Plan
- ☐ Test Appointment Letter
- ☐ Test CV
- ☐ Test Evidence - Professional Application

Add
Cancel



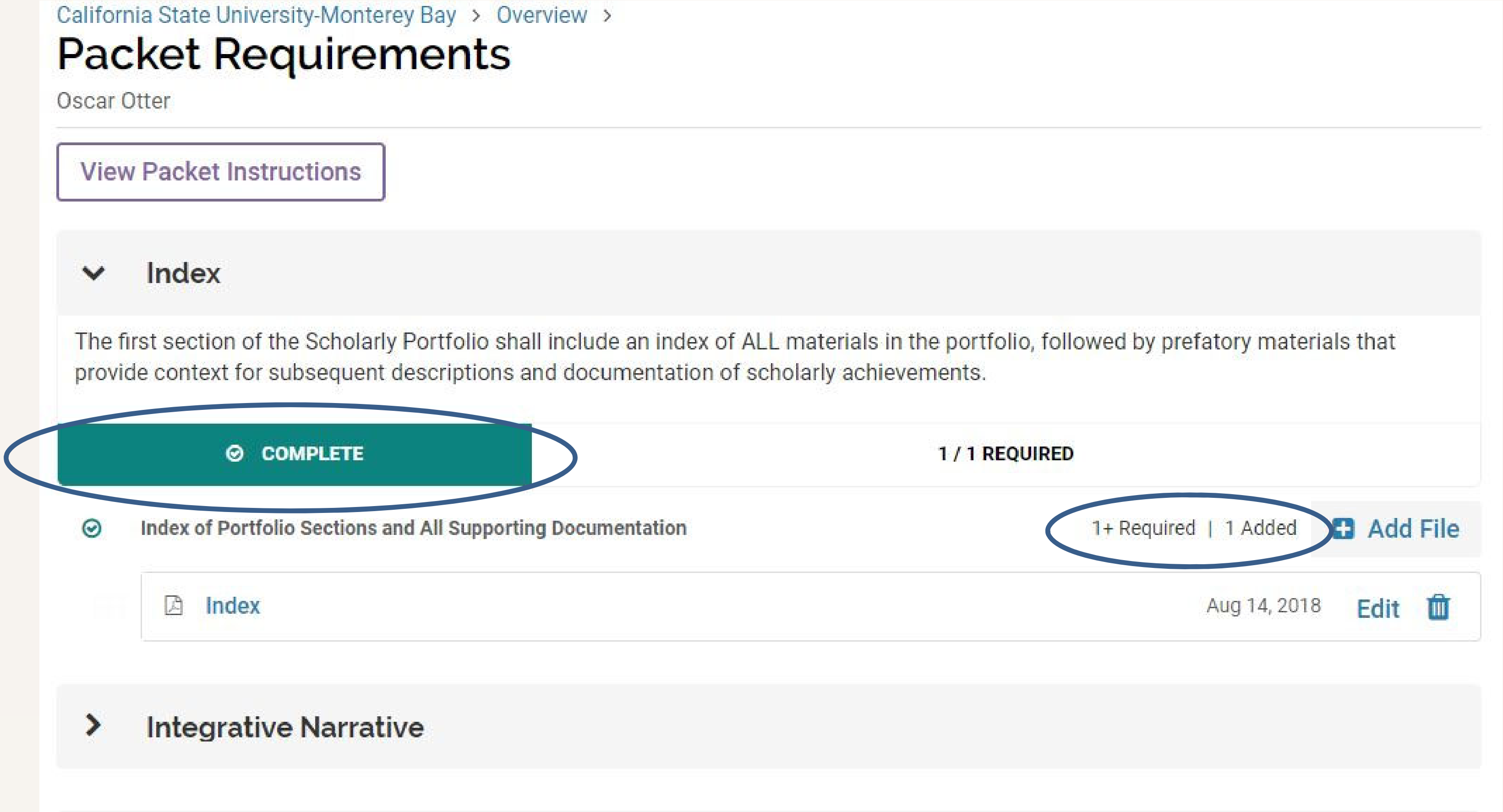
Add Integrative Narrative
1 Required

Choose Existing
Add New File
Upload
Video
Webpage

Drag & Drop your files anywhere or

Browse To Upload
Add
Cancel

Upload materials to sections



California State University-Monterey Bay > Overview >

Packet Requirements

Oscar Otter

Index

The first section of the Scholarly Portfolio shall include an index of ALL materials in the portfolio, followed by prefatory materials that provide context for subsequent descriptions and documentation of scholarly achievements.

COMPLETE

1 / 1 REQUIRED

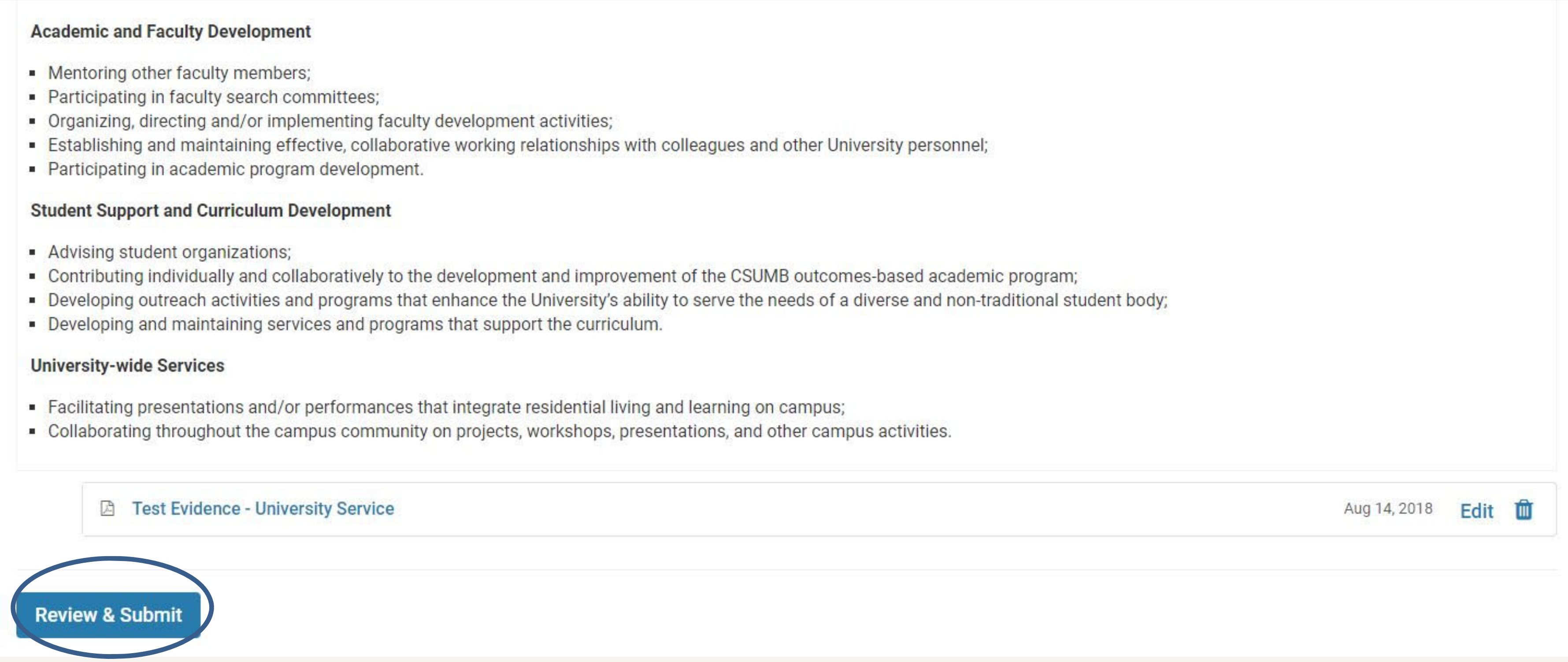
Index of Portfolio Sections and All Supporting Documentation

1+ Required | 1 Added

Index Aug 14, 2018

Integrative Narrative

All materials uploaded



Academic and Faculty Development

- Mentoring other faculty members;
- Participating in faculty search committees;
- Organizing, directing and/or implementing faculty development activities;
- Establishing and maintaining effective, collaborative working relationships with colleagues and other University personnel;
- Participating in academic program development.

Student Support and Curriculum Development

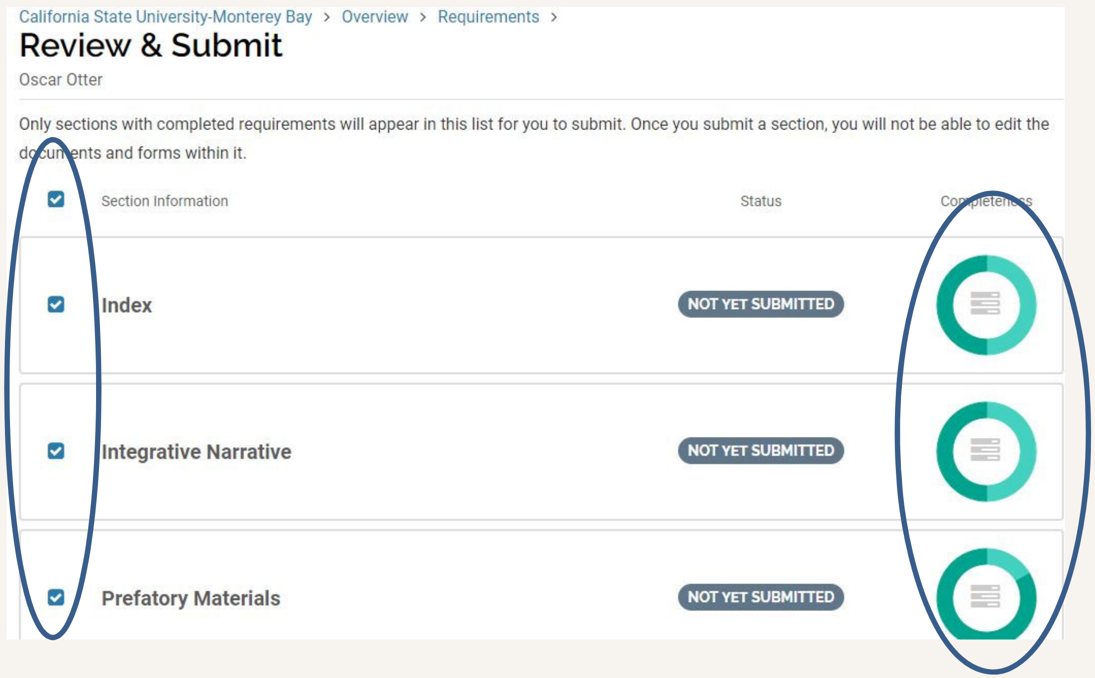
- Advising student organizations;
- Contributing individually and collaboratively to the development and improvement of the CSUMB outcomes-based academic program;
- Developing outreach activities and programs that enhance the University's ability to serve the needs of a diverse and non-traditional student body;
- Developing and maintaining services and programs that support the curriculum.

University-wide Services

- Facilitating presentations and/or performances that integrate residential living and learning on campus;
- Collaborating throughout the campus community on projects, workshops, presentations, and other campus activities.

Test Evidence - University Service Aug 14, 2018

Review packet



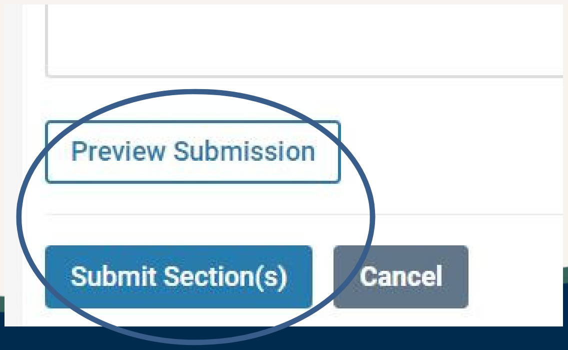
California State University-Monterey Bay › Overview › Requirements ›

Review & Submit

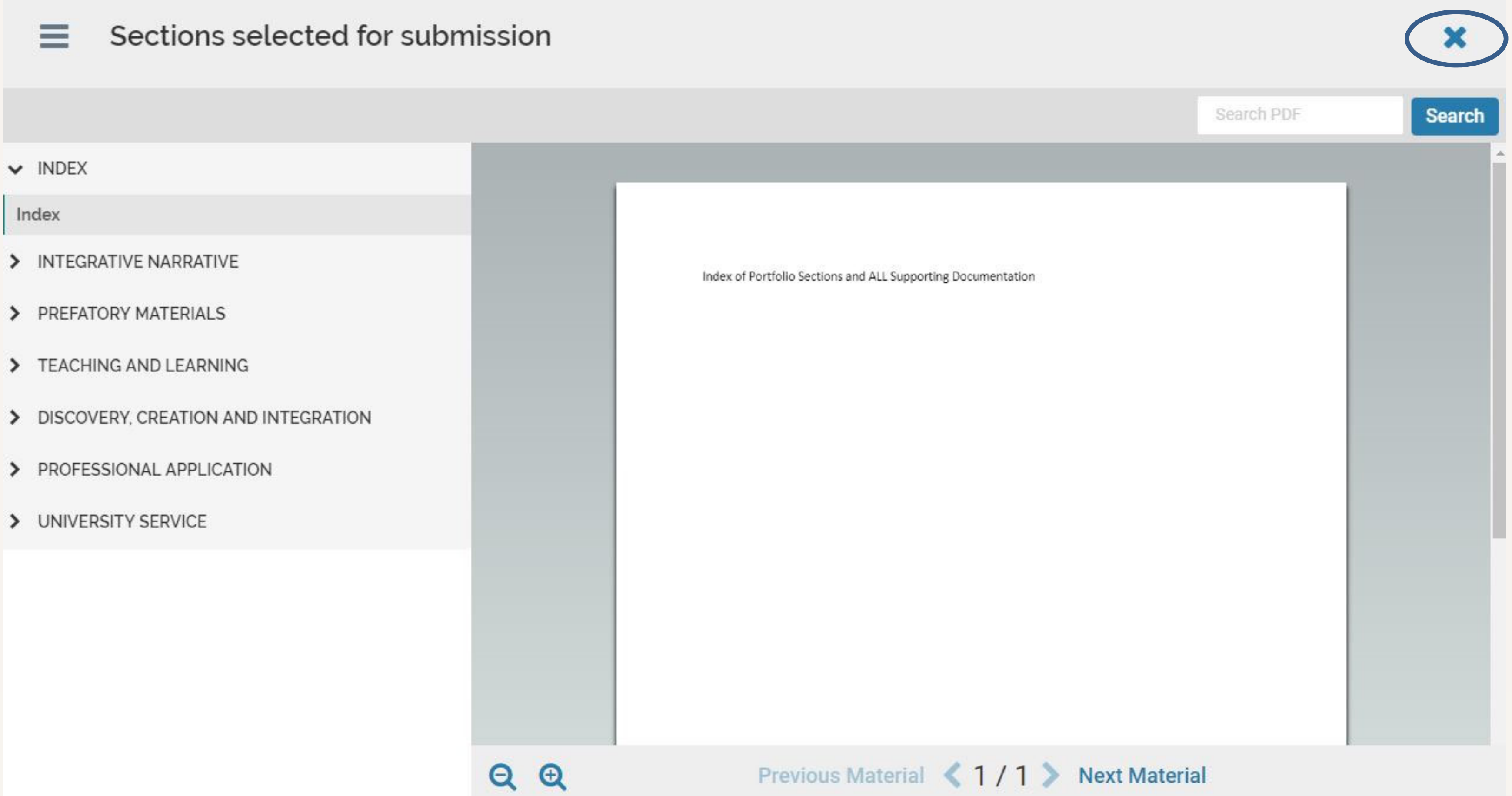
Oscar Otter

Only sections with completed requirements will appear in this list for you to submit. Once you submit a section, you will not be able to edit the documents and forms within it.

☑	Section Information	Status	Completeness
☑	Index	NOT YET SUBMITTED	
☑	Integrative Narrative	NOT YET SUBMITTED	
☑	Prefatory Materials	NOT YET SUBMITTED	



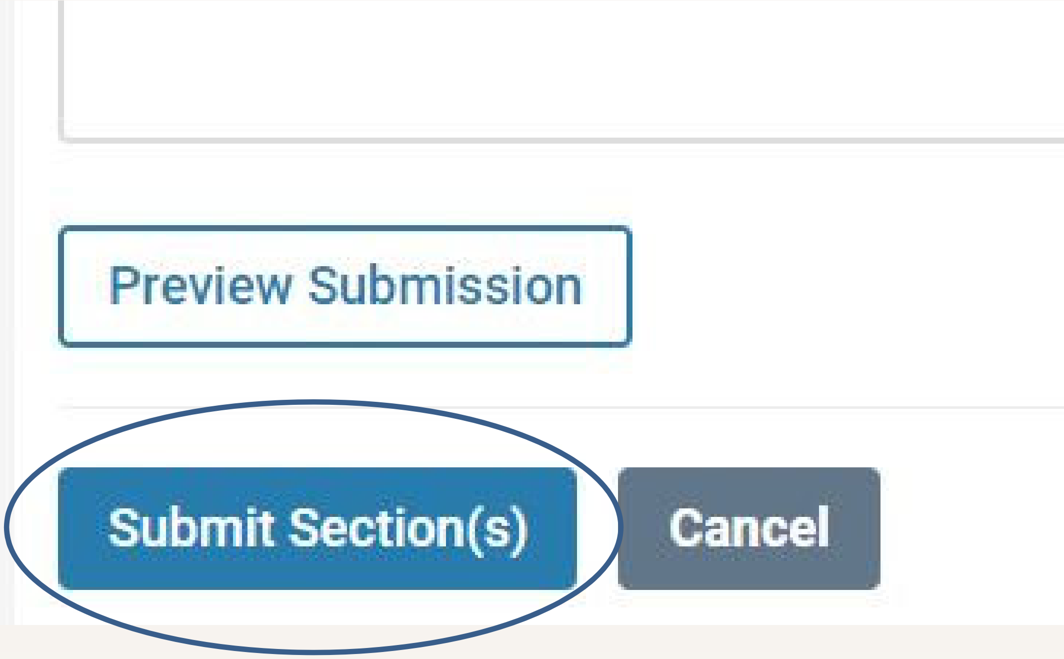
Preview submission



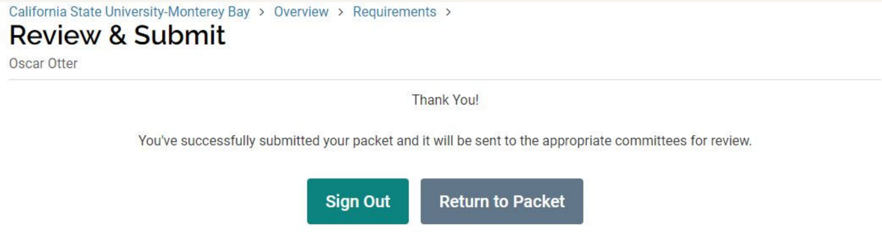
Sections selected for submission
Search PDF
Search
INDEX
Index
INTEGRATIVE NARRATIVE
PREFATORY MATERIALS
TEACHING AND LEARNING
DISCOVERY, CREATION AND INTEGRATION
PROFESSIONAL APPLICATION
UNIVERSITY SERVICE
Previous Material
1 / 1
Next Material

Index of Portfolio Sections and ALL Supporting Documentation

Submit packet


Preview Submission
Submit Section(s)
Cancel

Submitted packet

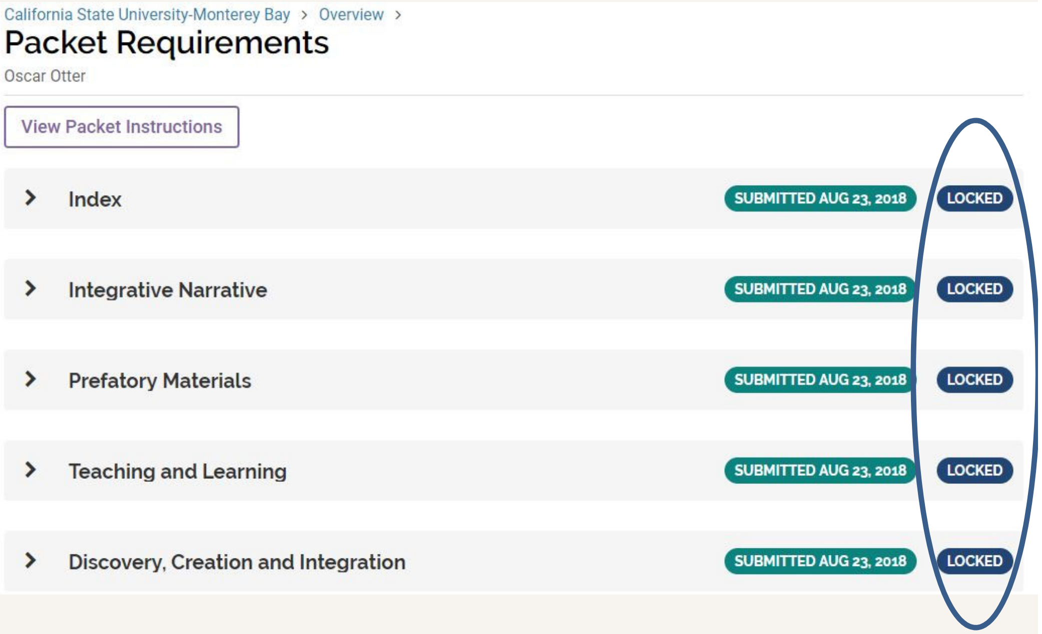

California State University-Monterey Bay > Overview > Requirements >

Review & Submit

Oscar Otter

Thank You!

You've successfully submitted your packet and it will be sent to the appropriate committees for review.

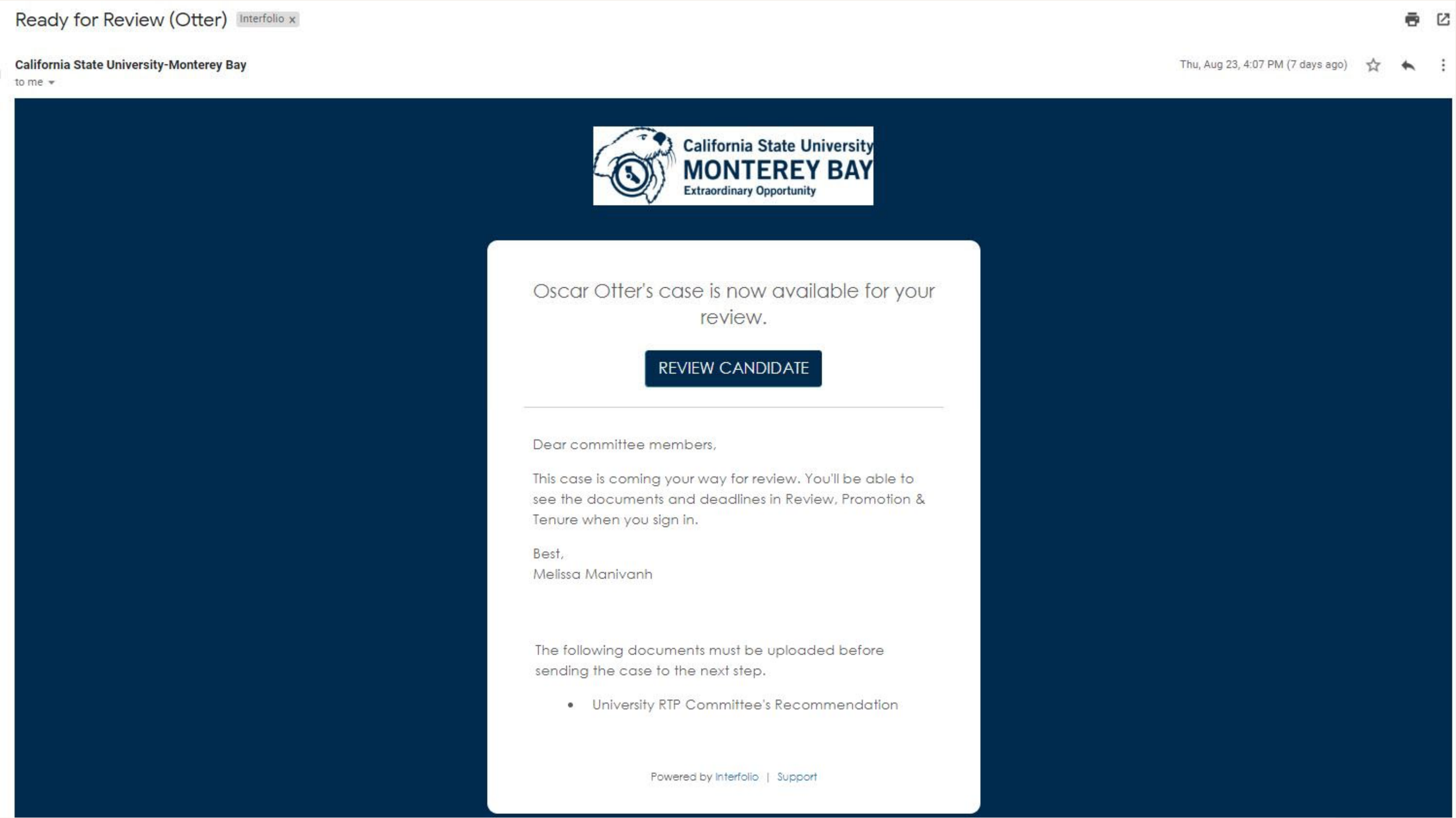

California State University-Monterey Bay > Overview >

Packet Requirements

Oscar Otter

- Index SUBMITTED AUG 23, 2018 LOCKED
- Integrative Narrative SUBMITTED AUG 23, 2018 LOCKED
- Prefatory Materials SUBMITTED AUG 23, 2018 LOCKED
- Teaching and Learning SUBMITTED AUG 23, 2018 LOCKED
- Discovery, Creation and Integration SUBMITTED AUG 23, 2018 LOCKED

Reviewer notification


Ready for Review (Otter)
Interfolio x

California State University-Monterey Bay
to me

Thu, Aug 23, 4:07 PM (7 days ago)

Oscar Otter's case is now available for your review.

REVIEW CANDIDATE

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,
Melissa Manivanh

The following documents must be uploaded before sending the case to the next step.

- University RTP Committee's Recommendation

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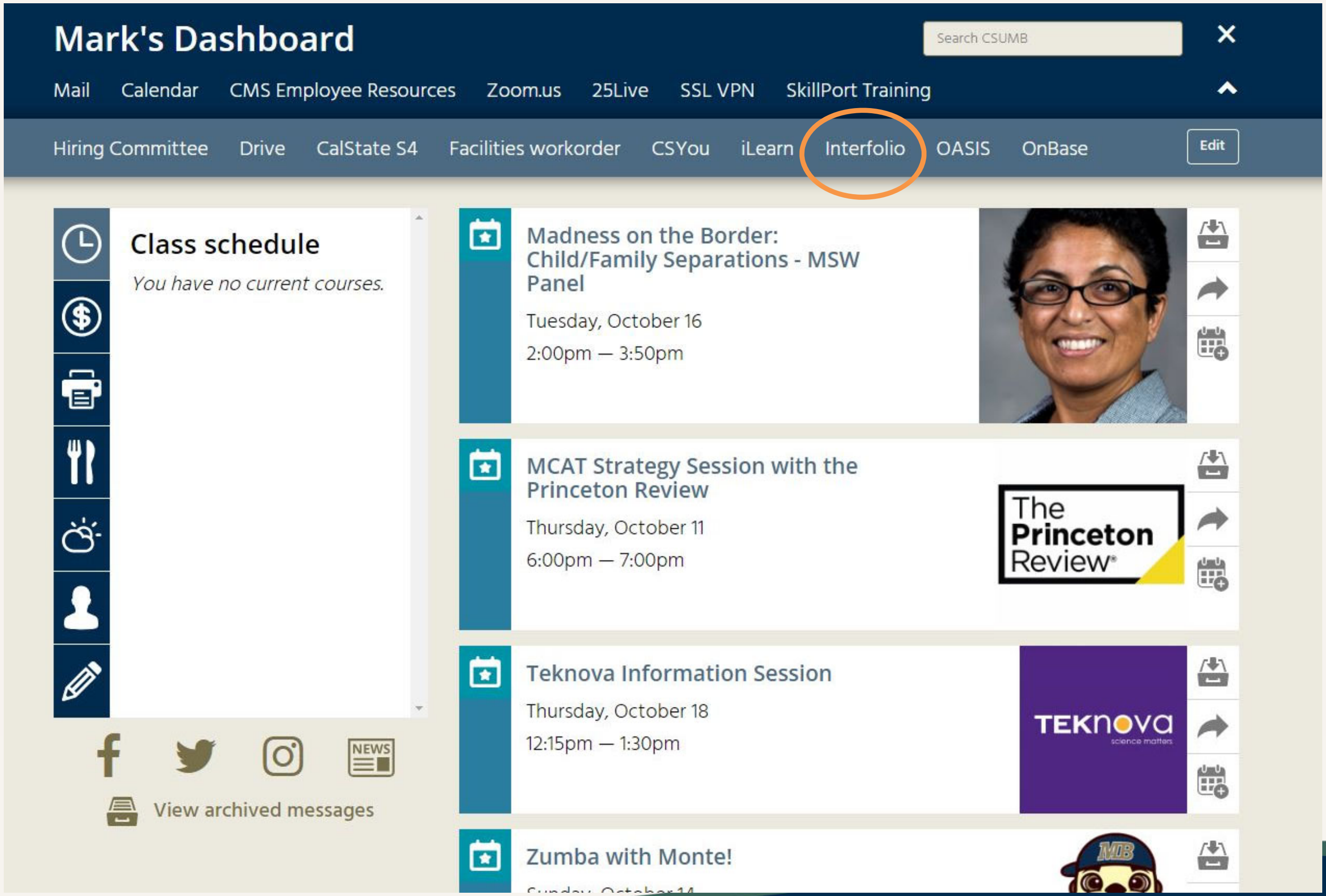
Reviewer sign-in


Search CSUMB
Mail
Calendar
CMS Employee Resources
Zoom.us
25Live
SSL VPN
SkillPort Training
Hiring Committee
Drive
CalState S4
Facilities workorder
CSYou
iLearn
Interfolio
OASIS
OnBase
Edit
The Princeton Review
TEKnova
View archived messages

Mark's Dashboard

Class schedule

You have no current courses.

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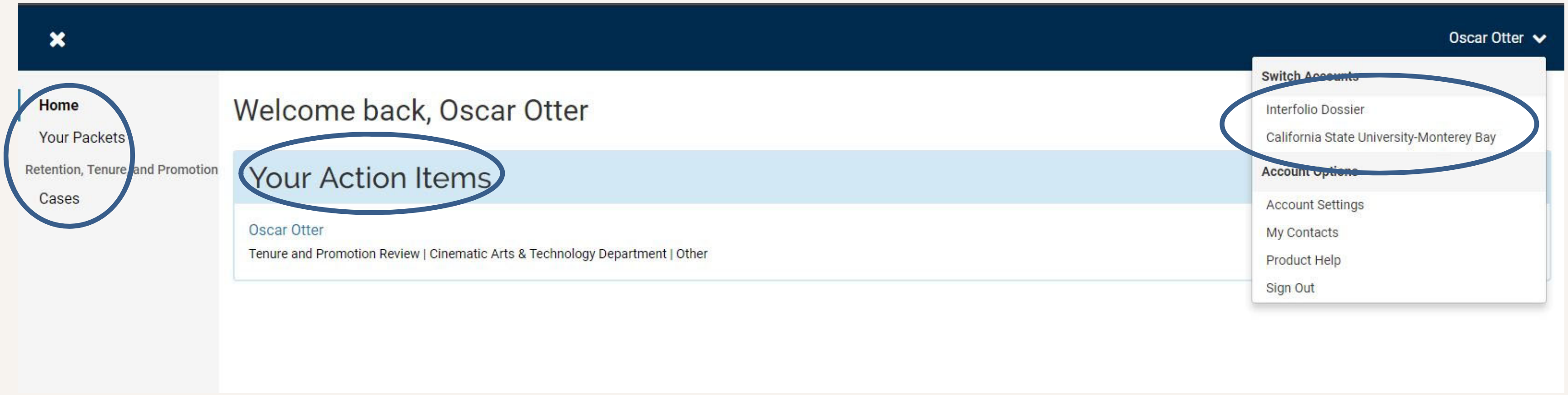
Zumba with Monte!

Home page


✖
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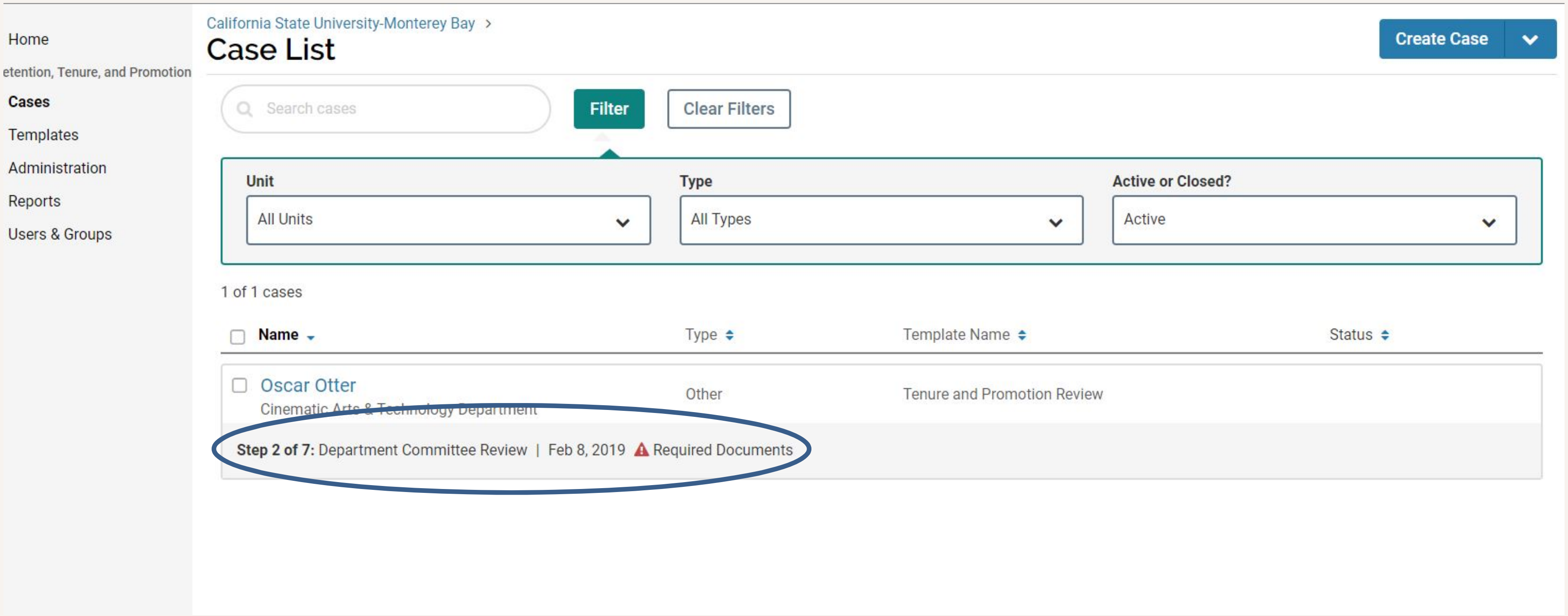
Welcome back, Oscar Otter

Your Action Items

Oscar Otter

Tenure and Promotion Review | Cinematic Arts & Technology Department | Other

Case review


Home
etention, Tenure, and Promotion
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Templates
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Reports
Users & Groups
Create Case
Search cases
Filter
Clear Filters

California State University-Monterey Bay >

Case List

Unit: All Units

Type: All Types

Active or Closed?: Active

1 of 1 cases

☐ Name	Type	Template Name	Status
☐ Oscar Otter Cinematic Arts & Technology Department	Other	Tenure and Promotion Review	

Step 2 of 7: Department Committee Review | Feb 8, 2019 ⚠ Required Documents

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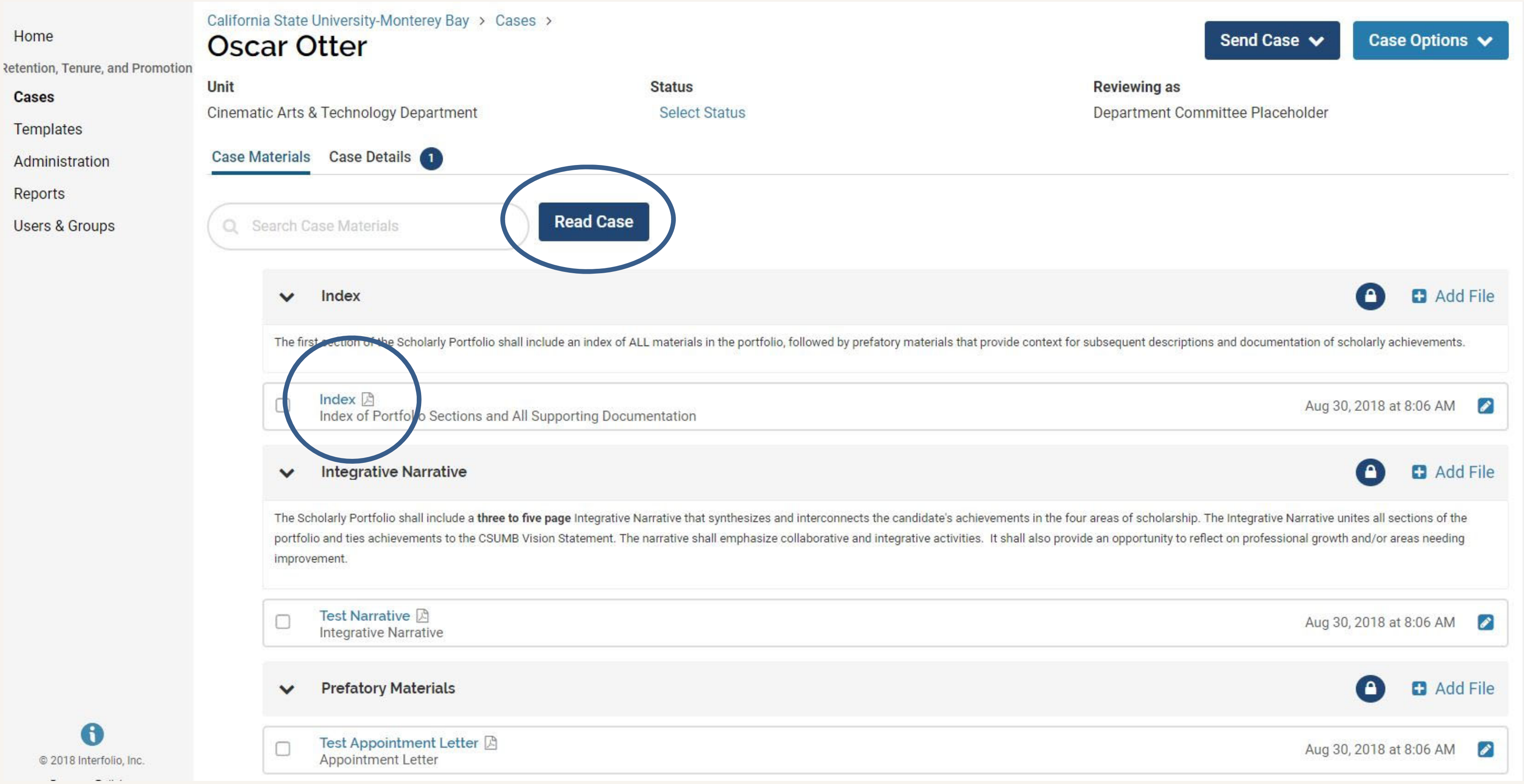
Case review (cont.)



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Oscar Otter

Unit
Cinematic Arts & Technology Department

Status
Select Status

Reviewing as
Department Committee Placeholder

Index

The first section of the Scholarly Portfolio shall include an index of ALL materials in the portfolio, followed by prefatory materials that provide context for subsequent descriptions and documentation of scholarly achievements.

☐ Index
Index of Portfolio Sections and All Supporting Documentation — Aug 30, 2018 at 8:06 AM

Integrative Narrative

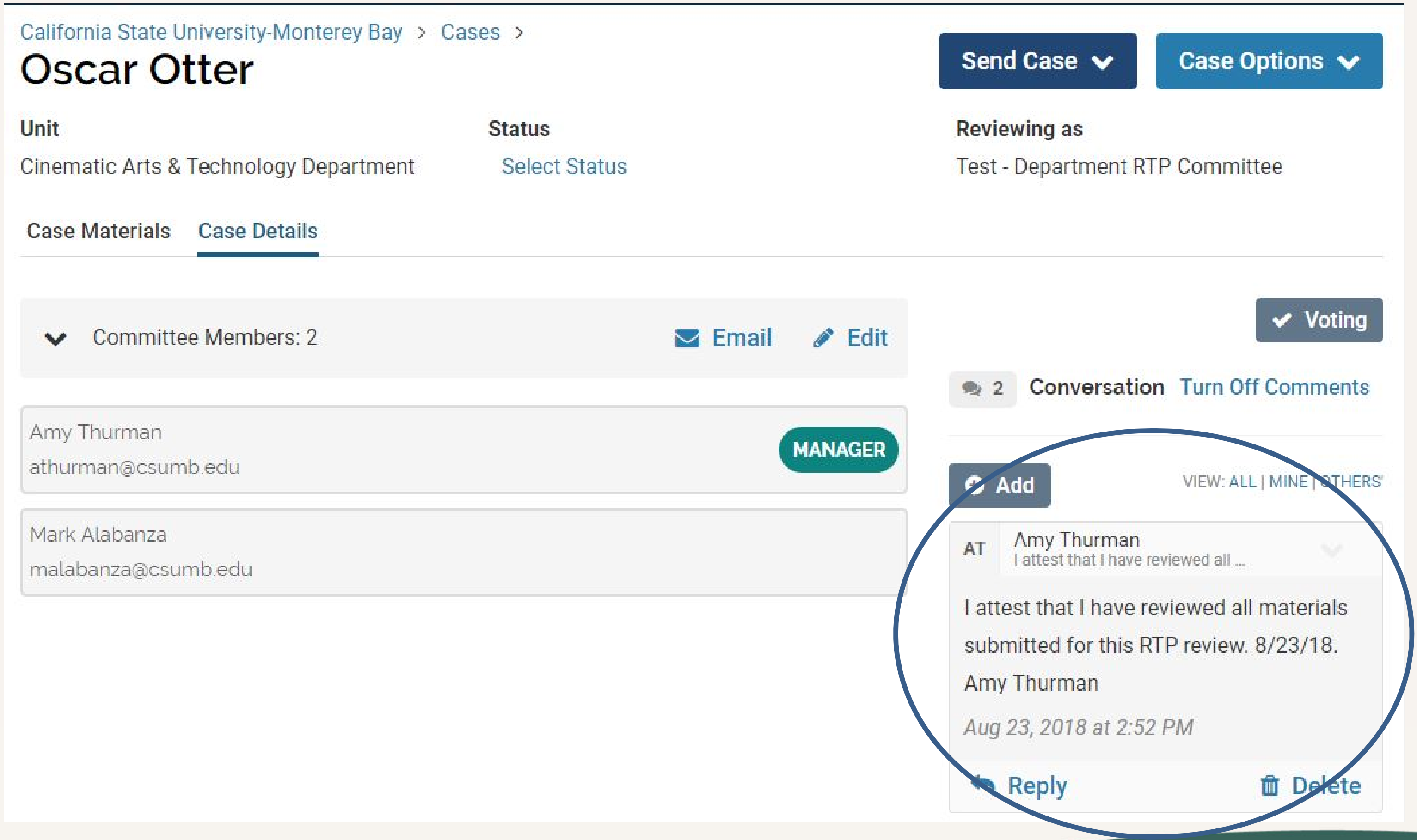
The Scholarly Portfolio shall include a **three to five page** Integrative Narrative that synthesizes and interconnects the candidate's achievements in the four areas of scholarship. The Integrative Narrative unites all sections of the portfolio and ties achievements to the CSUMB Vision Statement. The narrative shall emphasize collaborative and integrative activities. It shall also provide an opportunity to reflect on professional growth and/or areas needing improvement.

☐ Test Narrative
Integrative Narrative — Aug 30, 2018 at 8:06 AM

Prefatory Materials

☐ Test Appointment Letter
Appointment Letter — Aug 30, 2018 at 8:06 AM

Case review (cont.)



California State University-Monterey Bay > Cases >

Oscar Otter

Send Case | Case Options

Unit
Cinematic Arts & Technology Department

Status
Select Status

Reviewing as
Test - Department RTP Committee

Case Materials | Case Details

Committee Members: 2 | Email | Edit

Amy Thurman
athurman@csumb.edu
MANAGER

Mark Alabanza
malabanza@csumb.edu

✓ Voting

2 Conversation | Turn Off Comments

Add | VIEW: ALL | MINE | OTHERS

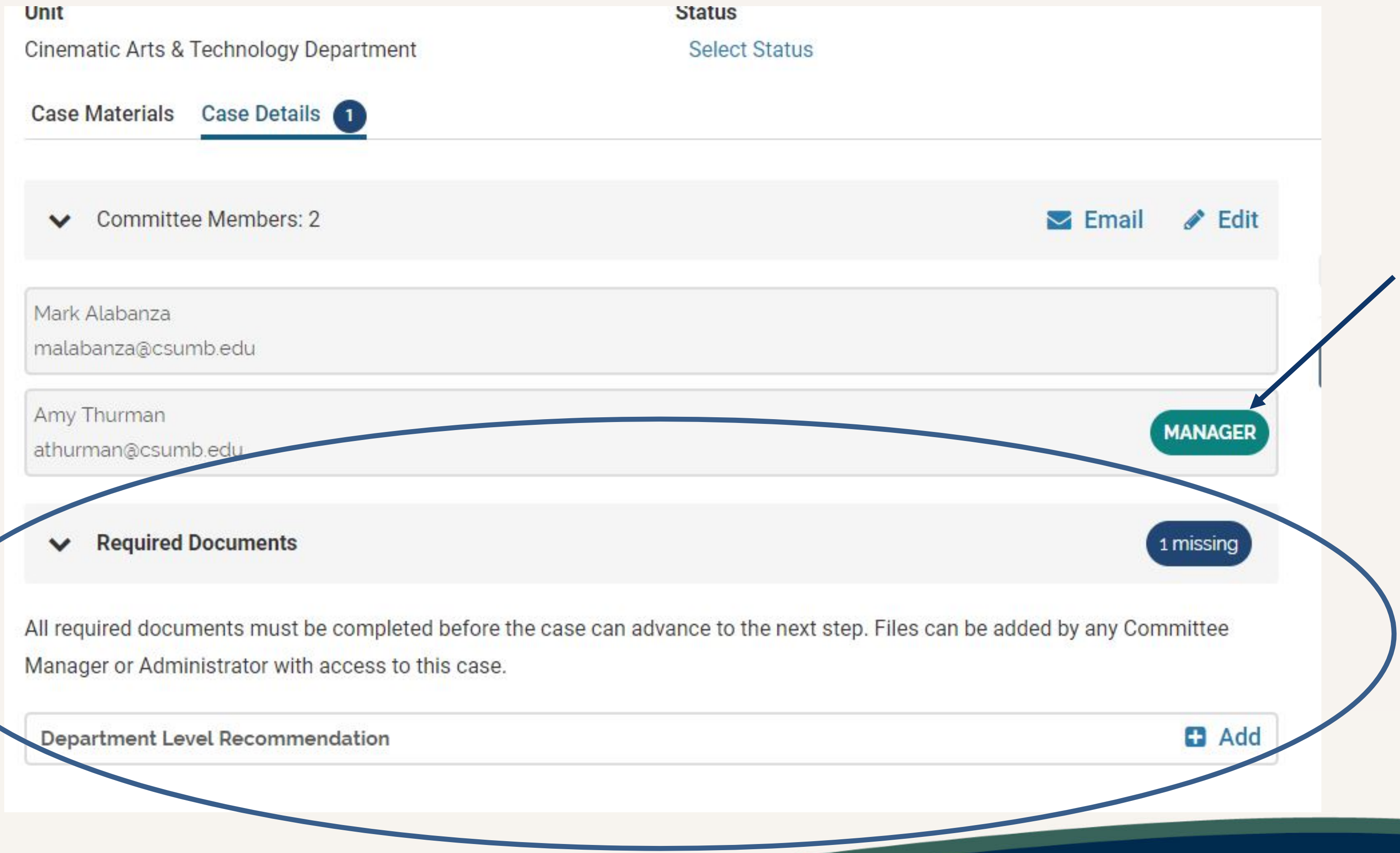
AT Amy Thurman
I attest that I have reviewed all ...

I attest that I have reviewed all materials submitted for this RTP review. 8/23/18. Amy Thurman

Aug 23, 2018 at 2:52 PM

Reply | Delete

Upload recommendation



Unit

Cinematic Arts & Technology Department

Status

Select Status

Case Materials
Case Details 1
Committee Members: 2
Email
Edit

Mark Alabanza
malabanza@csumb.edu

Amy Thurman
athurman@csumb.edu

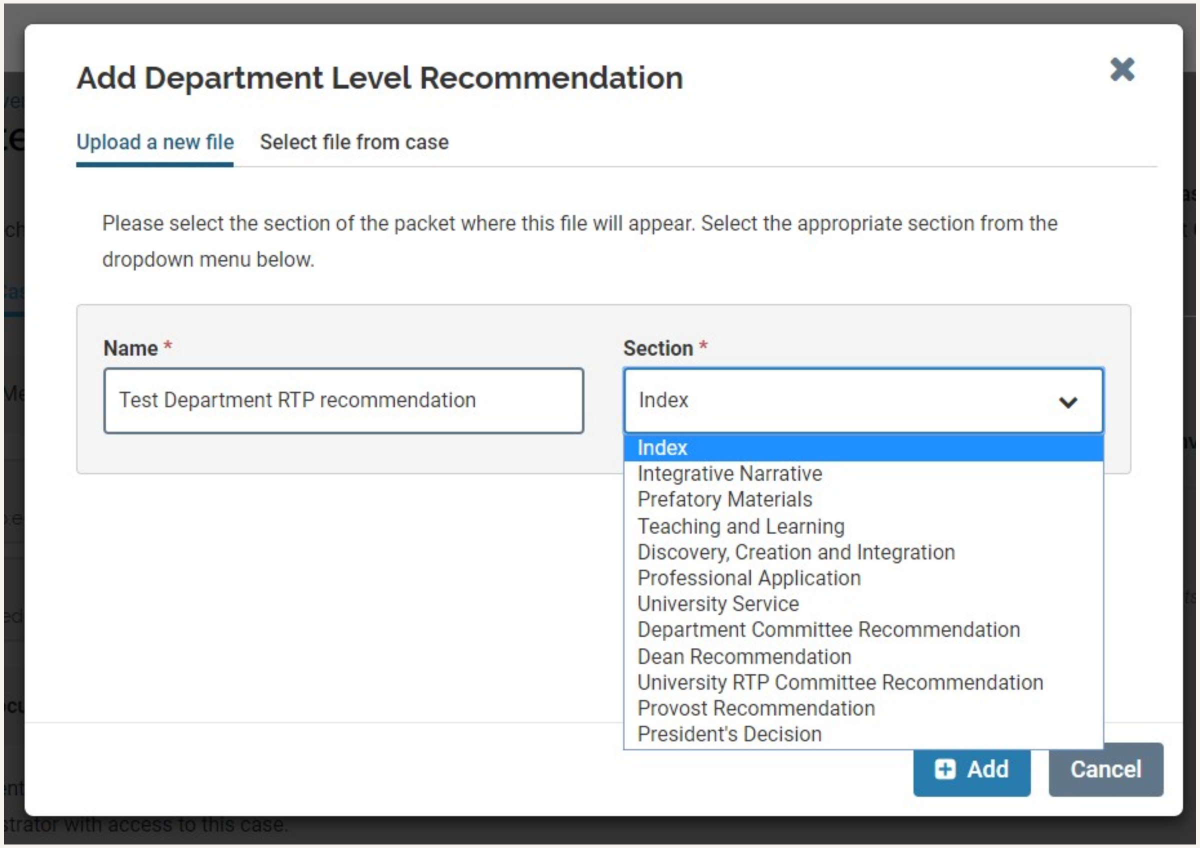
MANAGER
Required Documents
1 missing

All required documents 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 Level Recommendation

Add

Upload recommendation (cont.)


×
Upload a new file
Select file from case
Index
Integrative Narrative
Prefatory Materials
Teaching and Learning
Discovery, Creation and Integration
Professional Application
University Service
Department Committee Recommendation
Dean Recommendation
University RTP Committee Recommendation
Provost Recommendation
President's Decision
Add
Cancel

Add Department Level Recommendation

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

Name *: Test Department RTP recommendation

Section *: Index

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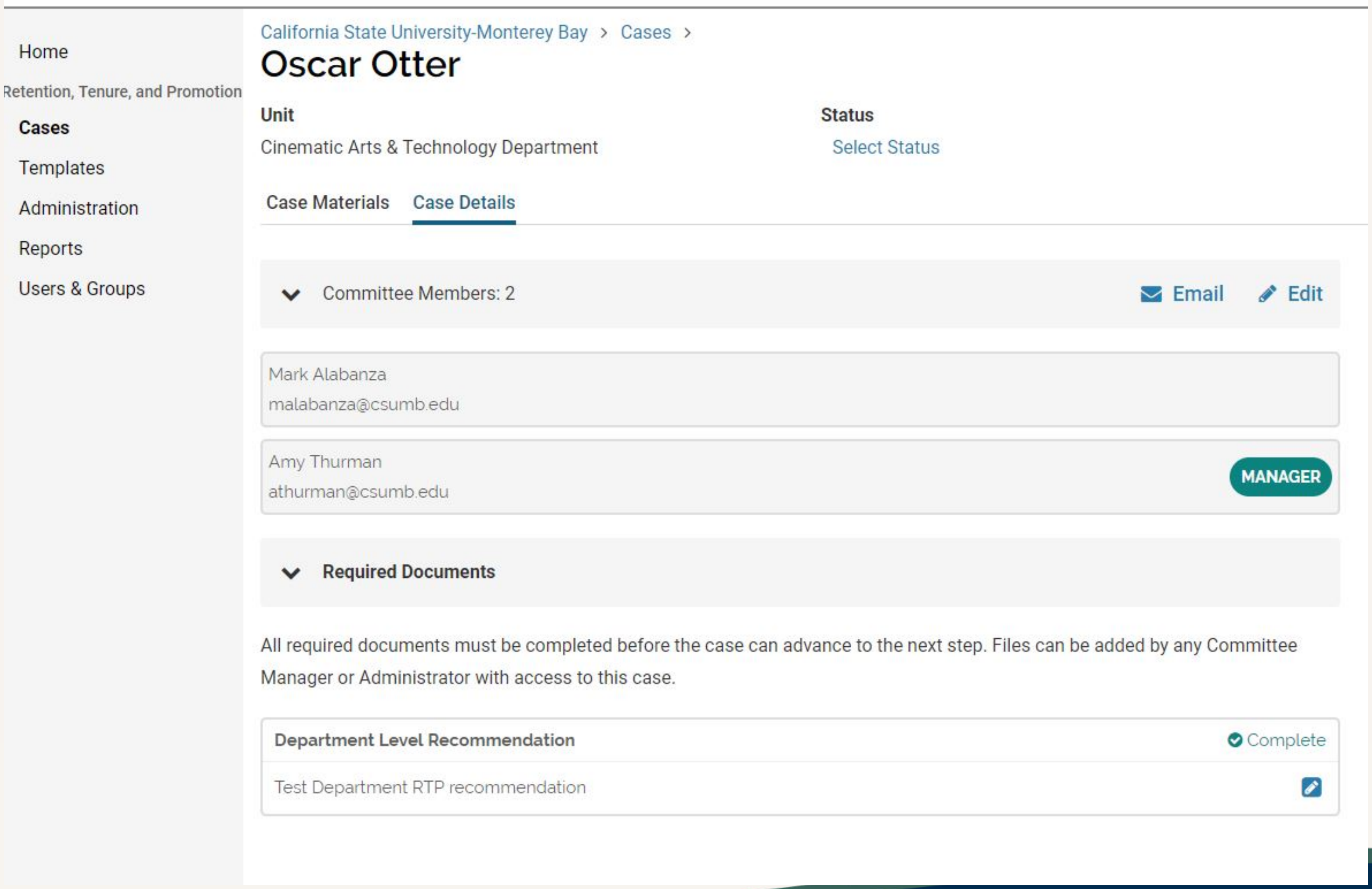
Upload recommendation (cont.)



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Oscar Otter

Unit
Cinematic Arts & Technology Department

Status
Select Status

Case Materials
Case Details
Email
Edit

Committee Members: 2

Mark Alabanza
malabanza@csumb.edu

Amy Thurman
athurman@csumb.edu
MANAGER

Required Documents

All required documents 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 Level Recommendation	✓ Complete
Test Department RTP recommendation	

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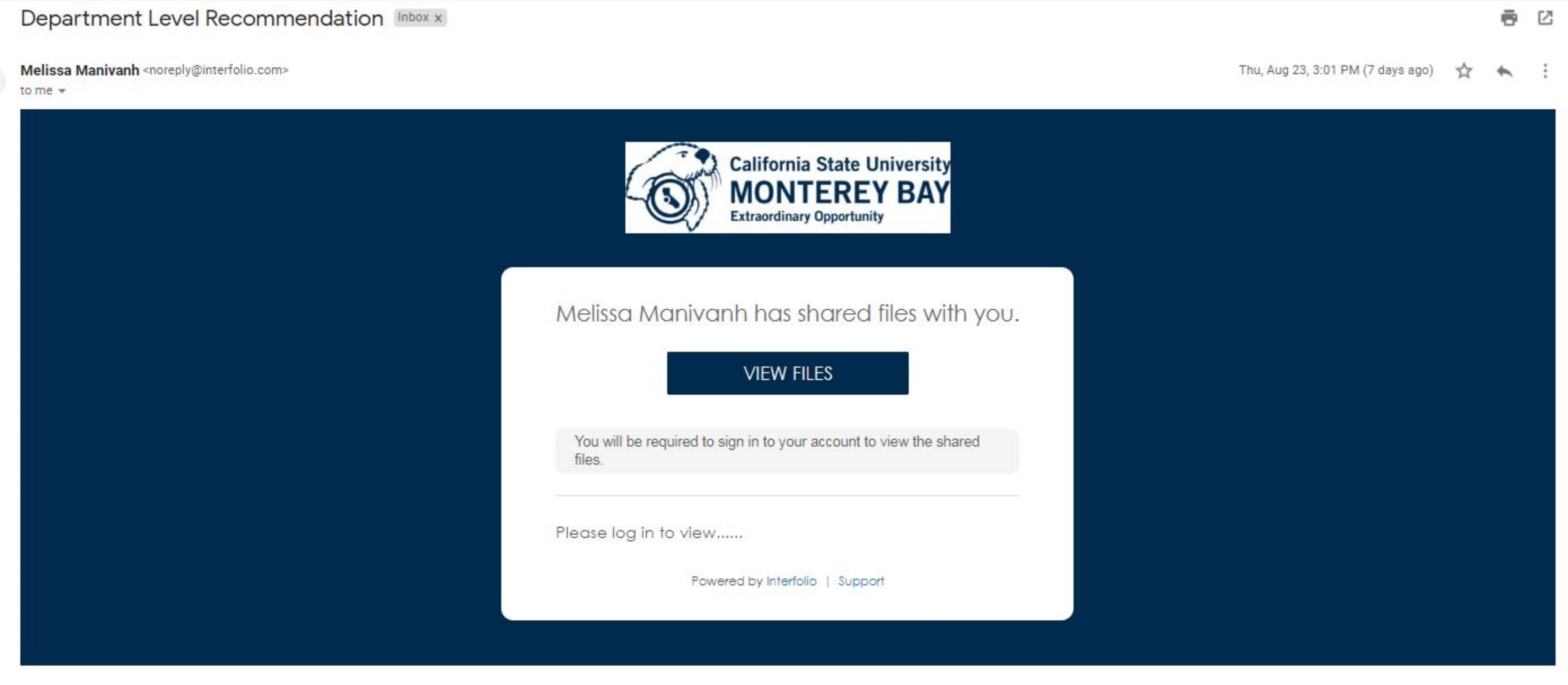
Rebuttal period



Department Level Recommendation

Melissa Manivanh <noreply@interfolio.com>
to me

Thu, Aug 23, 3:01 PM (7 days ago)

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Melissa Manivanh has shared files with you.

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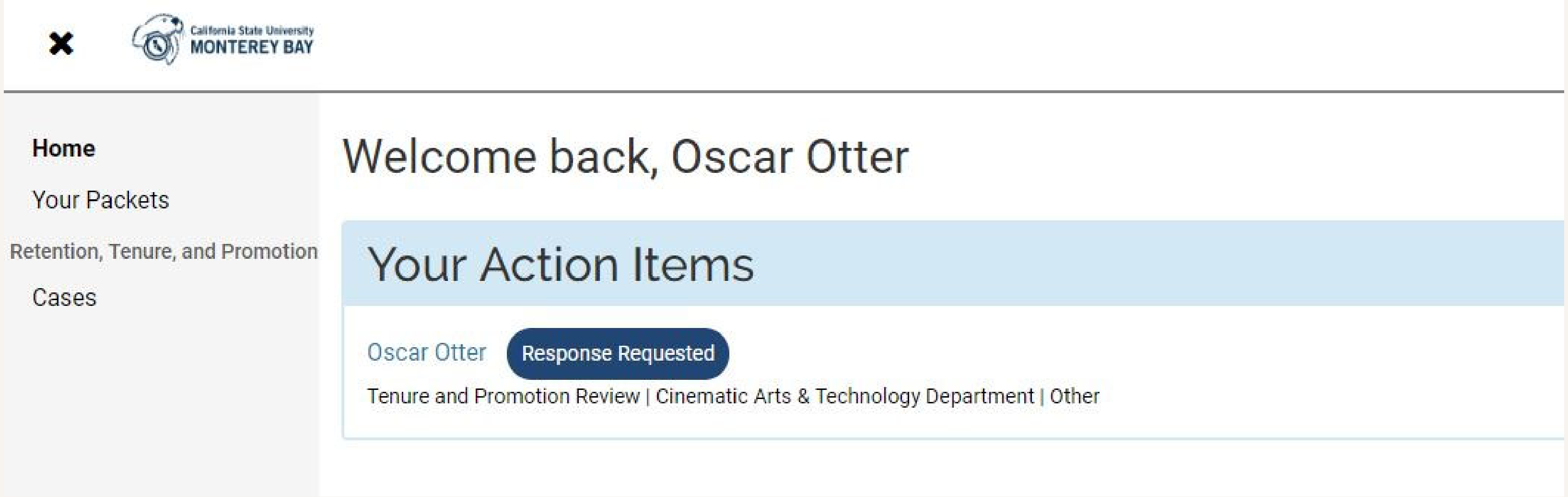
Rebuttal period (cont.)



✖
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Home
Your Packets
Retention, Tenure, and Promotion
Cases
Response Requested

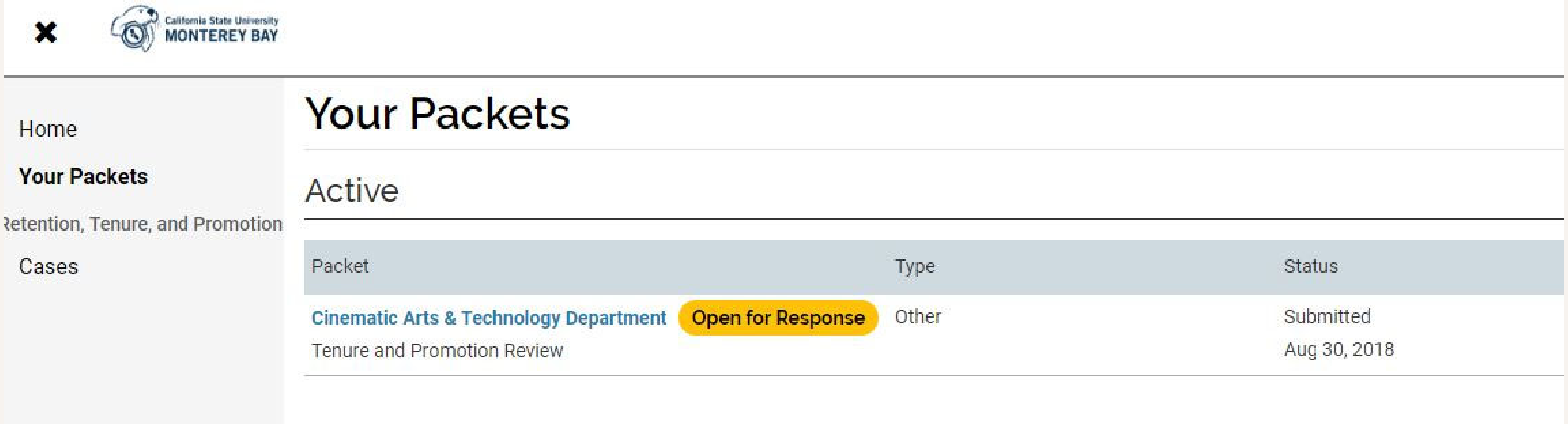
Welcome back, Oscar Otter

Your Action Items

Oscar Otter

Tenure and Promotion Review | Cinematic Arts & Technology Department | Other

Rebuttal period (cont.)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Your Packets
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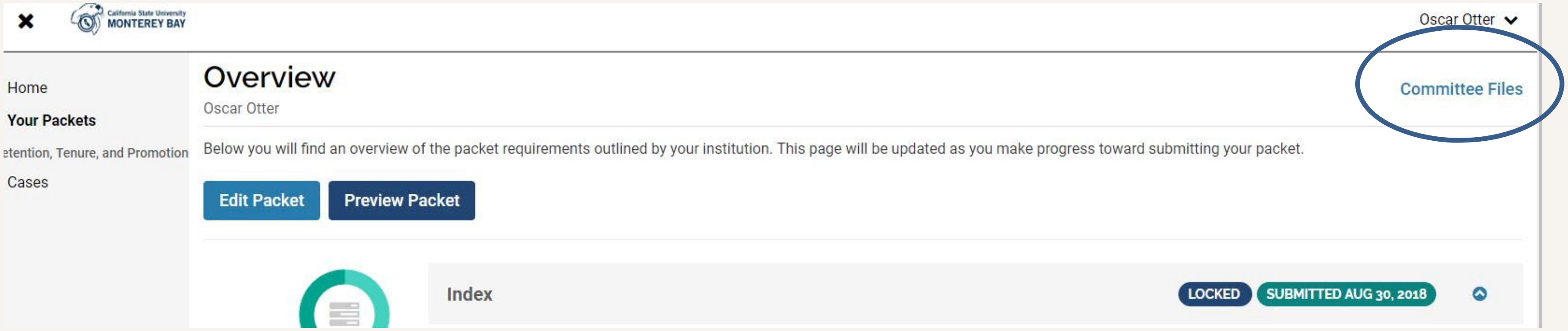
Cases

Your Packets

Active

Packet	Type	Status
Cinematic Arts & Technology Department **Open for Response** Tenure and Promotion Review	Other	Submitted Aug 30, 2018

Rebuttal period (cont.)



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Oscar Otter
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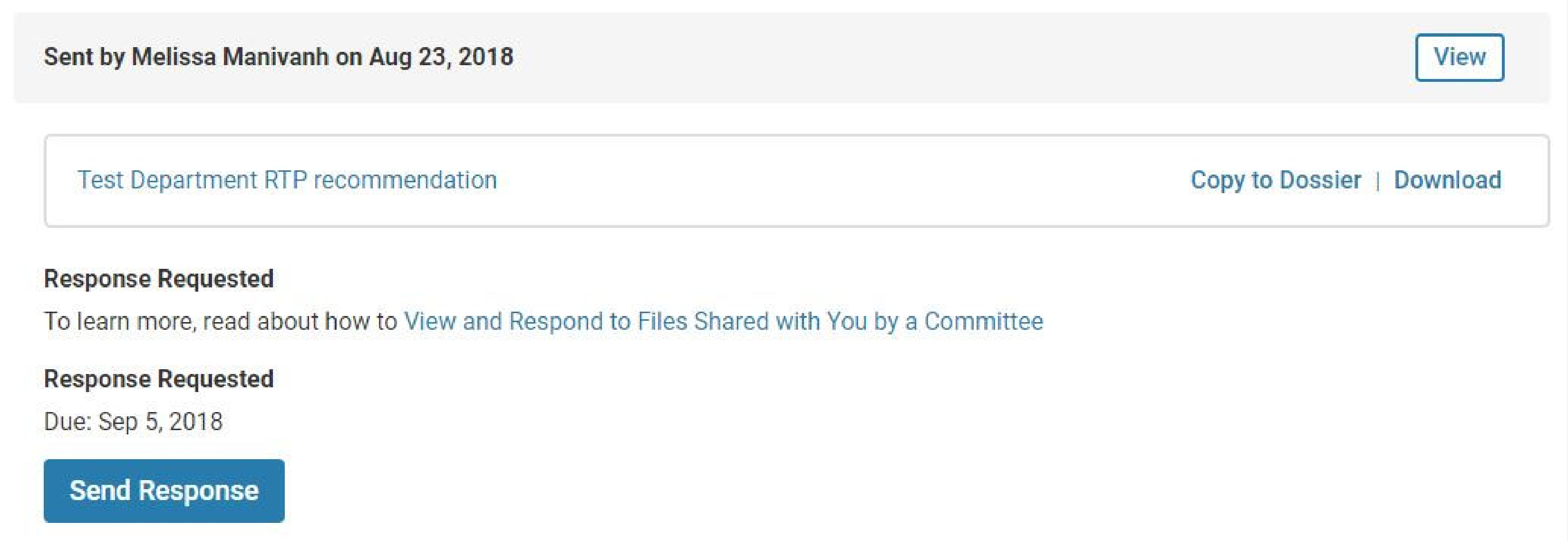
Cases
Committee Files
Edit Packet
Preview Packet
Index
LOCKED
SUBMITTED AUG 30, 2018

Overview

Oscar Otter

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward submitting your packet.

Rebuttal period (cont.)


View
Copy to Dossier | Download
Send Response

Sent by Melissa Manivanh on Aug 23, 2018

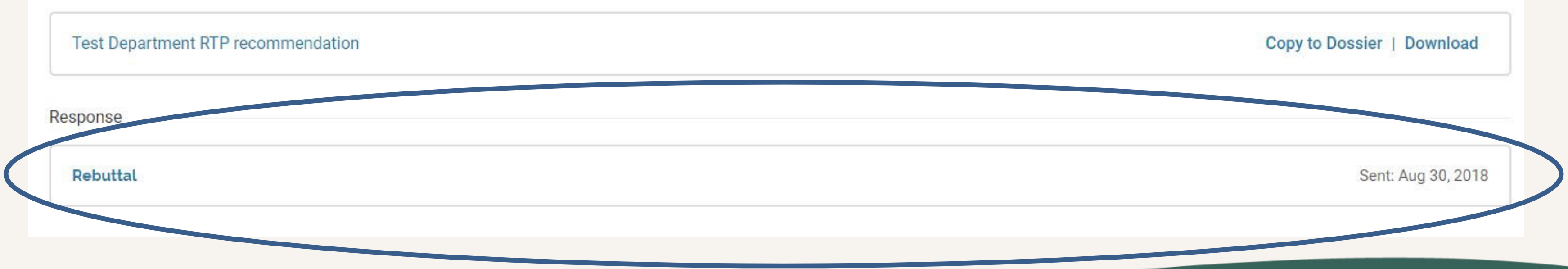
Test Department RTP recommendation

Response Requested

To learn more, read about how to View and Respond to Files Shared with You by a Committee

Response Requested

Due: Sep 5, 2018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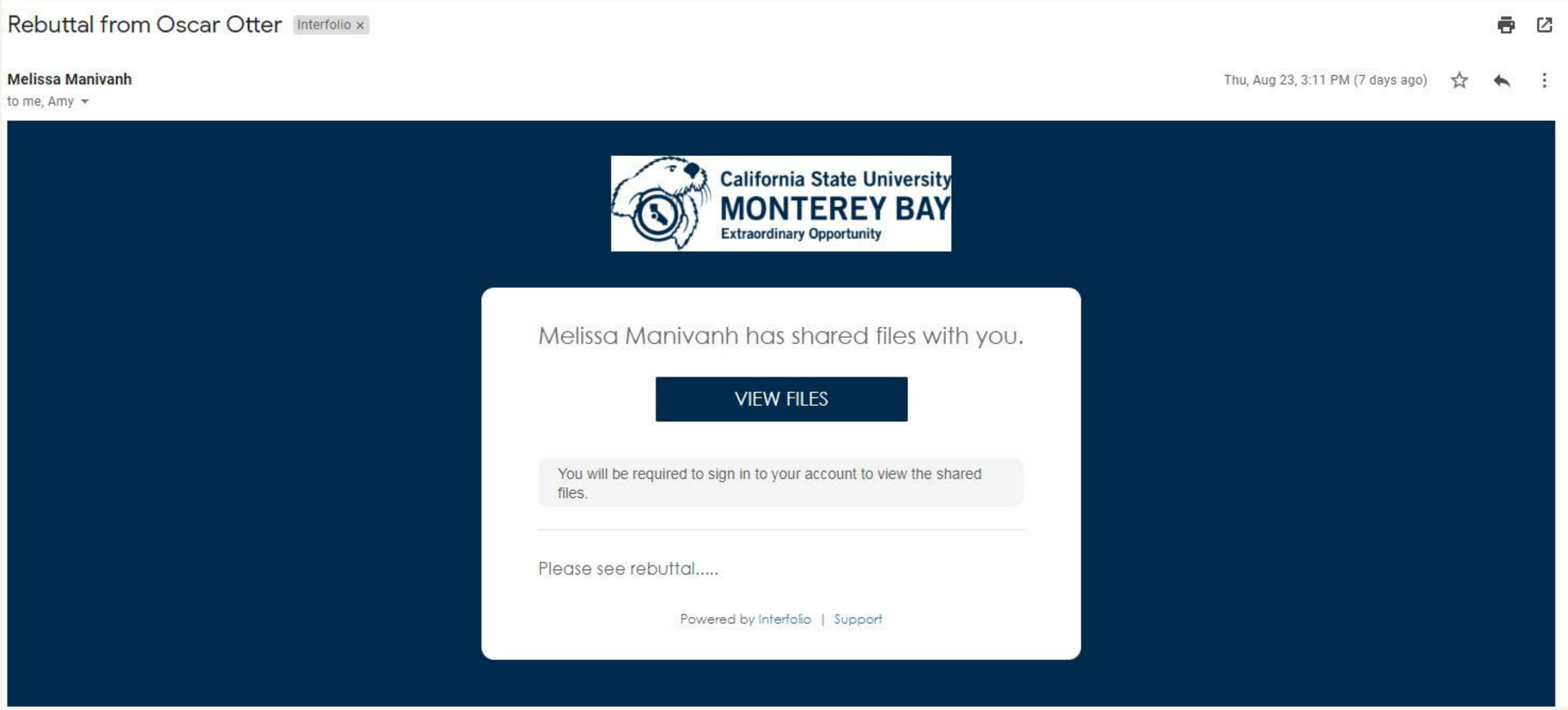
Test Department RTP recommendation

Response

Rebuttal Sent: Aug 30, 2018

Rebuttal period (cont.)



Rebuttal from Oscar Otter

Interfolio ×

Melissa Manivanh

to me, Amy

Thu, Aug 23, 3:11 PM (7 days ago)

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Please see rebuttal.....

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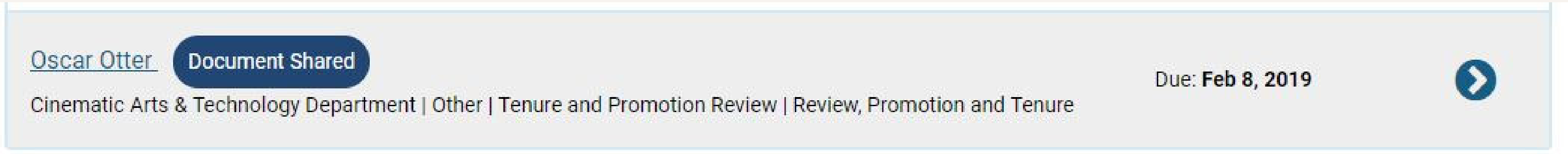


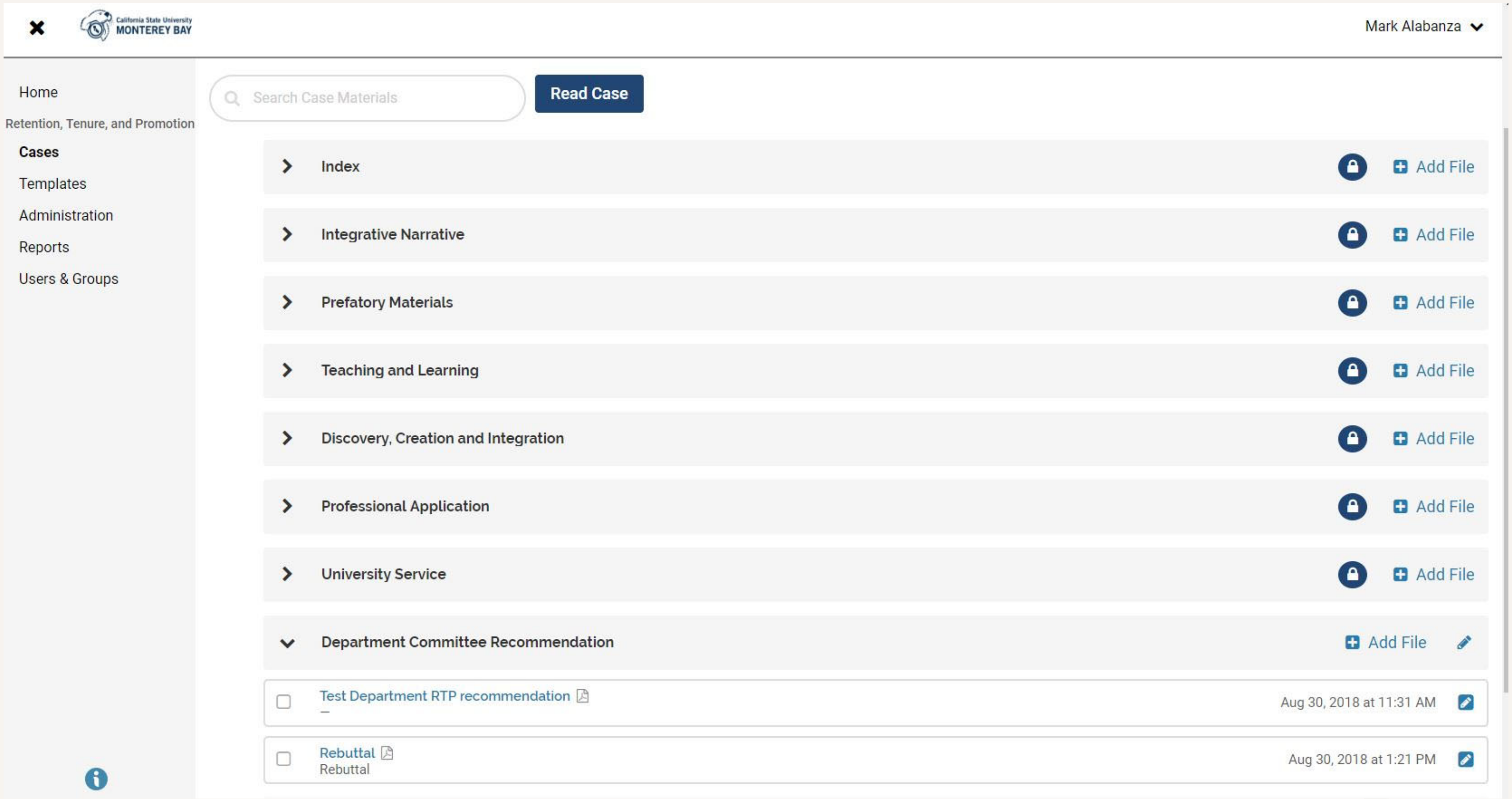
Oscar Otter

Document Shared

Cinematic Arts & Technology Department | Other | Tenure and Promotion Review | Review, Promotion and Tenure

Due: **Feb 8, 2019**

Rebuttal period (cont.)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Add File

- Index
- Integrative Narrative
- Prefatory Materials
- Teaching and Learning
- Discovery, Creation and Integration
- Professional Application
- University Service
- Department Committee Recommendation

☐	Test Department RTP recommendation –	Aug 30, 2018 at 11:31 AM
☐	Rebuttal Rebuttal	Aug 30, 2018 at 1:21 PM

Review completion

- All review levels will take place as outlined in the preceding slides
- University Personnel will facilitate process and provide reminders
- Process will follow schedule on Academic Personnel calendar
- Faculty will have access to packet and all shared committee recommendations upon completion

Questions?

Contact

- Melissa Manivanh, mmanivanh@, x4124

  Academic Personnel Analyst

- Mark Alabanza, malabanza@, x4642

  Assoc. Director for Academic Personnel