Overview
- Candidates will prepare CMU Tenure & Promotion (T&P) Portfolios according to the CMU Tenure & Promotion – Portfolio Instructional Guidelines.
- CMU T&P Portfolios must be submitted using Microsoft (MS) Teams.
- The MS Teams reviewing process is meant to support, not replace, the T&P process outlined in the Professional Personnel Employment Handbook.

MS Teams electronic submission
- MS Teams serves as the storage receptacle for the CMU T&P Portfolios, much like binders did previously.
- Historically, CMU T&P Portfolio binders were transferred from academic departments to the University T&P Committee to the Office of the VPAA as the portfolios went through the review process. Now, the 'MS Team' will be electronically transferred at each stage of the review process by simply changing membership and ownership.
- CMU T&P Portfolios submitted through MS Teams will be accessible to all eligible voting members of the respective academic department, the respective ADH and Administrative Assistant (Admin Assist), the University T&P Committee, and the Office of Academic Affairs.
- Detailed MS Teams instructions for the inexperienced user can be found near the end of this document in purple font. If you are unfamiliar with MS Teams, please see the 'Microsoft Teams – Basic' module on the CMU Information Technology "How to" page.
- At the completion of this review process, ownership of the MS Team will be returned to the candidate.

Review Process

T&P Candidate Submission[1]
- Each T&P candidate creates a 'MS Team' using the naming convention T&P Portfolio First and Last name (Example: T&P Portfolio Chad Middleton).
- Each T&P candidate uploads the Cover Sheet & Notice of Intent form, **one** Primary PDF document, and **one** PDF Appendices document (optional) according to the 'Document Naming Scheme' in the CMU Tenure & Promotion – Portfolio Instructional Guidelines.
  - Example: 2024-25-PES-CMiddleton-Cover Sheet.pdf
  - Example: 2024-25-PES-CMiddleton-Portfolio.pdf
  - Example: 2024-25-PES-CMiddleton-Appendices.pdf
- Each T&P candidate adds their ADH and Admin Assist as MS Team 'Owners' and the Academic Affairs (AA) Faculty Generalist as a MS Team 'Member', and then leaves the MS Team.
- T&P candidate emails their ADH and Admin Assist informing them that they have transferred ownership of the MS Team to them.

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[1] Notice: this step should already be completed by the T&P candidate prior to the start of the review process

ADH and Department Review

- ADH and/or Admin Assist confirm(s) that the T&P candidate has been removed from the respective MS Team.
- ADH or Admin Assist enrolls all eligible voting members of the academic department as 'Members' of the MS Team and informs these members that the *'Chat' function should not be used* as ownership of the MS Team will eventually be returned to the T&P candidate.
- Department faculty review the candidate's documents through MS Teams and the ADH subsequently conducts a poll of eligible voting members.
- Once the poll is complete, the ADH or Admin Assist removes all department faculty as 'Members', leaving the AA Faculty Generalist as a MS Team member.
- ADH downloads the Cover Sheet & Notice of Intent form from the MS Team, fills out the 'Department Faculty Recommendation' and the 'Department Head Recommendation' sections, and then uploads to the MS Team.
- ADH uploads their recommendation letter to the MS Team.
- ADH or Admin Assist adds the AA Faculty Generalist as MS Team 'Owner'.
- ADH or Admin Assist removes themselves from the MS Team.
- Admin Assist notifies the AA Faculty Generalist via email that they have completed their step of the review process.
- ADH notifies the T&P candidate via email whether the candidate received a positive or negative recommendation from their respective academic department.

Academic Affairs (AA) Faculty Generalist

- AA Faculty Generalist confirms that there are no academic department faculty 'Members', including the ADH and Admin Assist, in any T&P Portfolio MS Team.
- AA Faculty Generalist adds the University T&P committee as 'Members' to all T&P Portfolio MS Teams.
- AA Faculty Generalist makes the chair of the University T&P committee an 'Owner' of all T&P Portfolio MS Teams. AA Faculty Generalist also remains an 'Owner'.

University T&P Committee Review

- University T&P committee chair confirms that the ADH and Admin Assist have been removed from the respective MS Team.
- University T&P committee chair informs T&P committee that the *'Chat' function should not be used* as ownership of the MS Team will ultimately be returned to the T&P candidate.
- University T&P committee reviews candidate documents. Eligible committee members vote on candidates.
- Once the vote is complete, the University T&P committee chair asks the AA Faculty Generalist to remove all T&P committee members from the MS Team, with the exception of the T&P committee chair who remains as an 'Owner'.
- Subsequently, the University T&P committee chair downloads the Cover Sheet & Notice of Intent form from the MS Team, fills out the 'Tenure and Promotion Committee Recommendation', and then uploads to the MS Team.
- University T&P committee chair adds the VPAA as MS Team 'Owner'.
- University T&P committee chair removes themself from the MS Team.

- University T&P committee chair notifies the VPAA via email that they have completed their step of the review process.
- University T&P committee chair notifies the T&P candidate via email whether the candidate received a positive or negative recommendation from the University T&P committee.

University Record Keeping
- AA Faculty Generalist confirms that all University T&P committee members, including the chair, have been removed from the respective MS Team
- AA Faculty Generalist copies all documents, including the Cover Sheet & Notice of Intent form, for personnel files
- AA Faculty Generalist removes the Cover Sheet & Notice of Intent form from MS Team
- AA Faculty Generalist adds candidate as 'Owner' and removes all other 'Owners' and 'Members', including self

MS Teams Detailed Instructions

To Add 'Members':
- Click on the ellipses ('…') next to your MS Team name (top left of MS Team)
- Click on 'Add member' and 'start typing a name or group' of the CMU individual you are interested in adding. Their name should appear in the drop-down menu. Choose their name and select 'Add'

To Promote a 'Member' to 'Owner':
- Click on the ellipses ('...') next to your MS Team name (top left of MS Team)
- Click on 'Manage team' and then 'Members and guests'
- Click on the 'down arrow' next to 'Member' (right middle of T&P Portfolio team) and change to 'Owner'

To Remove 'Members':
- Click on the ellipses ('…') next to your MS Team name (top left of MS Team)
- Click on 'Manage team' and then 'Members and guests'
- Clicking on the '×', which is to the right of 'down arrow' next to 'Member' will remove this member

To Remove Self or 'Leave' Team:
- Click on the ellipses ('…') next to your MS Team name (top left of MS Team)
- Click on 'Leave team'

To Upload Files to a MS Team:
- Select 'Files' in the General channel (top middle of T&P Portfolio team)
- Click on the 'down arrow' next to 'Upload' and then click 'Files'

Created 06/2023