

SCHOOL OF MEDICINE FACULTY ACTIONS CHECKLIST

WORKDAY ACTIONS: Faculty Hire

Job Requisition

- If tenure track, tenure line approval
- Proforma

Hire: Add in the candidate profile *Attachments* section prior to generating LOO

- P103
- Supplemental Data Sheet
- Faculty Ballot
- Draft AWP
- CV
- 2 Recommendation Letters or Summary of References signed by dept leadership (For Instructor or Assistant Professor only)
- P102
- Transcript: After LOO is signed (submit via Interfolio RPT)
- If tenure track, tenure line approval
- PAT Letter, if advanced rank or immediate tenure (see below review required)

Additional Items for Appointments at rank of Associate Professor or Professor or Immediate Tenure (Prior PAT Review Required)

- 4 Support Letters including key points confirming:
 - Their professional relationship with the candidate (e.g., colleague, supervisor).
 - Whether the candidate is a good fit for the position.
 - Examples of the candidate's work (e.g., accomplishments).
 - Feedback on the candidate's strengths and areas for improvement.
- Chair's Letter
- CV
- Faculty Ballot: If immediate tenure and advanced rank are both being submitted, separate ballots are required

WORKDAY ACTIONS: Job Change

Job change: Reappointment

- Signed LOO, if salary is changing

Lecturer Appointment/Reappointment

- CV
- Contract

Phased Retirement (use [phased retirement QRG](#))

- Signed Phased Retirement Contract
- Annual Work Plan

SCHOOL OF MEDICINE FACULTY ACTIONS CHECKLIST

Job change: FTE change

- P103
- Signed LOO
- Annual Work Plan

Job change: Compensation

- P103
- Signed addendum to current LOO with new salary
- Off cycle email approval from the Provost
- Annual Work Plan, if work assignment is changing
- Must note in the comments regarding the shift in compensation

Please note: Off cycle salary increase may not be combined with the promotion increase

Job Change: Department or Unit

- P103
- Signed LOO
- Annual Work Plan
- Faculty Ballot
- CV, if unit change

Job Change: Promotion (to assistant professor)

- P103
- Brief Chair Letter explaining reasoning for promotion
- Proof of Board Certification, if applicable
- Supplemental data sheet, if unit decanal appointment
- Signed LOO, if increase is included

Please note: Promotions to Assistant Professor typically don't include a salary increase

Job Change: Promotion (to associate professor or professor)

- P103
- All other documents required are to be provided via Interfolio case. For a full list of required documents please refer to the case sections.
- Salary increase may not be combined with any other compensation change

Please note: Promotion review is to be done via Interfolio

SCHOOL OF MEDICINE FACULTY ACTIONS CHECKLIST

WORKDAY ACTIONS: Additional Job

Additional Job: Department Chair and Division Chief

- P103
- Signed LOO
- Supplemental Data Sheet
- Annual Work Plan
- Faculty Ballot, for dept chairs only

Additional Job: Program Director (unit decanal or administrative)

- P103
- Signed LOO
- Supplemental Data Sheet
- Annual Work Plan

Additional Job: program director (internal to the department)

- P103
- Annual Work Plan

Additional Job: Joint Appointment (use [Faculty - Adding Joint Appointment QRG](#))

- P103
- Signed LOO
- Annual Work Plan
- Faculty Ballot

WORKDAY ACTIONS: Appointment End

End Additional Job: Decanal, Program Director, Department Chair

- Must include note/comment box

Status Change/Phased Retirement

- P103
- Phased Retirement Contract

Voluntary

- Faculty resignation or request for retirement

Involuntary

- Notification to faculty member
- Non-renewal letter

SCHOOL OF MEDICINE FACULTY ACTIONS CHECKLIST

Emeriti with end job

- P103
- Faculty Ballot
- CV
- Chair letter

Gratis with end of job

- Gratis Application
- Chair letter

Leave of Absence

Medical/Personal/Parental

- FMLA request form

Entrepreneurial

- Signed entrepreneurial agreement

SCHOOL OF MEDICINE FACULTY ACTIONS CHECKLIST

INTERFOLIO ACTIONS

Gratis Appointments/Reappointments

- Gratis application

Gratis Promotions

- Gratis application
- Chair's letter recommending promotion
- CV

Associate Appointments/Reappointments

- P103A

Sabbatical Leave

- P103
- CV
- Outcome from previous sabbatical(s)
- Plan for current sabbatical with deliverables
- A short separate summary of plan/outcomes
- Signed guarantee of one-year of service upon return from sabbatical
- Dean's support letter
- Chair's support letter

Endowed Chair Appointment

- P103
- Supplemental Data Sheet
- CV
- Annual Work Plan
- Gift Agreement
- Chair's letter: must include EC contract criteria suggestions and statement about salary support by grants and how the department will rectify this in the AWP with EC salary support

Endowed Chair Reappointment

- P103
- CV
- Annual Work Plan
- Gift Agreement
- Chair's letter: must include performance of criteria, EC contract criteria suggestions if change is needed and statement about salary support by grants and how the department will rectify this in the AWP with EC salary support

SCHOOL OF MEDICINE FACULTY ACTIONS CHECKLIST

Emeriti (if not with end job)

- P103
- Faculty Ballot
- CV
- Chair Letter

Extension of Probationary Period

- P103
- Faculty request
- Chair support letter
- CV

Other Interfolio Reviews: Required items are listed in Interfolio case

- Advanced Rank gr and/or Award of Tenure
- Periodic Career Review
- Special Periodic Career Review
- Expiration of Appointment (4 months in advance)
- Advanced Rank Appointment/Immediate Tenure
- Letter of Intent