GENERAL COMMENTS - LSOM PTAC PROCESS

• The University of Texas Health San Antonio (UT Health SA) Long School of Medicine (LSOM) promotion and/or tenure (P/T) processes starting Fiscal Year 2018 are diagrammed in the three PTAC Process State Maps (UT Health SA, LSOM, LSOM Department maps) with embedded timetables based on the UT Health SA’s institutional Handbook of Operating Procedures (HOP) and the need to remain compatible with the related UT Board of Regents’ (BOR) calendar and operations.

• For the FY18 inaugural LSOM PTAC operations and related faculty and Department PTAC preparations, the HOP-embedded P/T guidelines and process have remained little-changed from those of prior years. The PTAC Guidelines have been updated only through re-verifying the wording and order to reflect the current UT Health SA HOP listings, and by adding annotations to provide LSOM-relevant clarifications and ‘broader’ interpretations.
  o Little change was introduced in order to continue a process that would be fair for each faculty member and LSOM department, since P/T preparation is always an ongoing process commencing with faculty appointment.
  o Letters of Support should be limited to 12 – 15 total.
  o The faculty member’s ‘Personal Statement’ should no longer be part of the eCV, if it was added to the CV, but is now a stand-alone ‘Personal Reflective Narrative.’ Do not use a memo format or address the narrative to anyone/the PTAC.
  o Guidelines for the Personal Reflective Narrative: (11 font Arial, 3-page maximum). Faculty member describes how building scholarship strength area(s) into a cohesive career path during the timeframe under review has been personally important and significant in terms of such as ‘good citizenship’ and academic impact, building a scholarly legacy and achievement hopes for the future. The purpose is not to repeat the CV, but to give the faculty member an opportunity to express more about themselves as an academic health sciences professional.

• The eTalus eCV is the current CV to include in the LSOM PTAC packet.
  o The eTalus Curriculum Vitae Sections document is a reference resource for faculty career planning and mentoring, career activity focus and organization, and CV preparation. It informs faculty and the PTAC about building and interpreting the eCV. Related to promotion and tenure, use the eTalus Curriculum Vitae Sections document to help determine which CV section best showcases each faculty activity and achievement, so PTAC reviewers can readily understand the faculty career and pathway.

  o The LSOM faculty PTAC process involves creation of a standard LSOM PTAC Packet with department-level contributions from the department PTAC, the faculty member, the department’s PTAC packet administrative point-person, the Department Chair, as well as contributions from outside the department. (See Checklist to Compile PTAC Packet Contents.)
WHAT IS THE ADMINISTRATIVE STAFF ROLE IN HELPING THE FACULTY MEMBER BUILD THE eCV?

- ETalus CV - The *eTalus Curriculum Vitae Sections* document must be ‘studied’ by the faculty member so that his/her activities and achievements are documented IN THE CORRECT, i.e., MOST RELEVANT and understandable section of the eCV, and with sufficient detail to demonstrate relevance and impact. If administrative staff will be helping the faculty member with eCV entries, this eCV ‘study’ activity must be done together. Without a discussion, it is often not obvious ‘why’ the faculty member engaged in a certain activity and how important it is in the career ‘picture,’ so the activity or achievement is at risk to be under-detailed or placed in the wrong section of the eCV and therefore. Review each eCV entry, faculty member will probably need a reminder that you need to work together to agree where in the eCV each activity would be best listed and with what amount and type of detail. This becomes critical when the faculty member is preparing for PTAC review on any level.

- Work together to the extent needed to complete the PTAC *bookmarking* of the eCV, using the section titles shown on the *Scholarship Strength Showcase Framework*. The aim is to point the PTAC reviewers directly to the relevant work accomplishments, which are usually listed in various different sections of the CV, and not necessarily under the section title corresponding to the faculty member’s area of scholarship strength.

- Following the *Scholarship Strength Showcase Framework* while bookmarking the eCV is an important part of how the faculty member and department builds a ‘waterproof case’ to substantiate that the PTAC ‘request’ for promotion and/or tenure is without a doubt deserved at this time. See bookmarking section below.

- Remind the faculty member that it is essential for PTAC purposes to:
  1. Include sufficient detail in the CV. This means they must supply you with the details as well as review the listing and location of the listing in the CV and agree everything is correct. Usually it is helpful to include detail such as quantity/frequency/location of each activity and achievement; otherwise, there is risk that the extent and significance of the faculty effort will be underappreciated by those reading the eCV, such as the PTAC reviewers. See General Tips below.
  2. Write the Personal Reflective Narrative as a separate document. Guidelines above.
DIRECTIONS: BOOKMARKING PERTINENT eCV ITEMS and SECTIONS to the SCHOLARSHIP STRENGTH SHOWCASE FRAMEWORK*

A Bookmark is a type of link with representative text in the navigation panel. Bookmarks allow you to jump to the specified topic within a PDF document.

Refer to the Scholarship Strength Showcase Framework* and use each title listed as the actual bookmark titles in the electronic pdf packet. Titles in BLUE on the Framework are titles to be bookmarked in all CVs meaning that all CVs must contain bookmarks of the 4 main eCV section titles: General Information, Teaching, Research, Service, and the 2 eCV sub-sections under General Information: Academic Appointments, Honors and Awards. Sub-section titles in black are CV-specific bookmarks used as below.

➤ CV-specific bookmarks: Each faculty member’s CV will only have sub-section bookmarks depending on the track and scholarship strength(s).
  - **NonTenure-Track**: ONLY create sub-section bookmarks using the titles that are listed on the Framework under the ONE Scholarship Strength area indicated on the Coversheet. Use only the sub-section titles relevant to the particular faculty member’s career.
  - **Tenure-Track or Tenure**: ONLY create sub-section bookmarks using the titles that are listed on the Framework under the TWO Scholarship Strength areas indicated on the Coversheet. Use only the sub-section titles relevant to the particular faculty member’s career.
  - In the ONE or TWO Scholarship Strength area(s) being bookmarked, ensure you are bookmarking all RELEVANT eTalus CV material - no matter in which eTalus section it is found. For example, Educational research funding will be listed in the eTALUS CV section, RESEARCH and then under Grants; however, when documenting the Scholarship Strength TEACHING, this research needs to be bookmarked to the TEACHING area called Teaching/Education-related Research.

➤ Use the sub-section titles on the Framework. Use an outline format.

➤ **Mentoring**: This section cannot be blank. Essential to bookmark all relevant eTalus subsections or single items here. Use an outline format. Check where you/the faculty member listed their role in formal and informal trainee or peer mentoring, on supervising committees, or providing MS or PhD dissertation supervision, etc. Especially check the eTALUS CV section called ‘Other Teaching/Non-Course-based.’
* SCHOLARSHIP STRENGTH SHOWCASE FRAMEWORK:

GENERAL INFORMATION: (Do not include a personal statement in the eCV).
- Academic Appointments
- Honors and Awards

TEACHING:
- Non-Clinical Teaching:
  - Course-based
  - Non-Course-based
- Clinical Teaching
- Presentations or other Teaching/Education
  a. Example of Teaching related Presentation
  b. Example of Other Teaching/Education
- Teaching/Education-related Research
- Teaching/Education-related Service (Committees, Professional Groups)

RESEARCH:
- Research Expertise
- Research-related Teaching/Education (Possibly, link to Non-Clinical Teaching)
- Research-related Service (Responsible for a core; Committee service, Grant Review, etc.)
- Research Projects
- Publications
- Presentations
- Research Grants
- Patents

SERVICE:
- Administrative Responsibilities (Leadership title roles like Director, Coordinator, Co-Chair, Vice President, Dean, Chair, Deputy Chair, Vice Chair, etc.)
- Clinical Service
  - Inpatient
  - Outpatient
- Service-related Teaching/Education
- Service-related Research:
- Service to Government
- Service to our Institution
- Service to Profession - Professional organizations – Member or participation in some way.
- Service to Area (community, public)
- Committee Service (Institutional; School; Department; Hospital; Profession-related organization committee)

MENTORING: This section cannot be blank. Use to showcase mentoring for any area(s) of Scholarship Strength demonstrated above. Bookmark all relevant activities from any area of the eCV. Use outline format.
CURRENT FACULTY - PROMOTION/TENURE  WHAT IS THE ADMINISTRATIVE STAFF ROLE IN PREPARING THE LSOM PTAC PACKET FOR A CURRENT FACULTY MEMBER SEEKING PROMOTION IN RANK AND/OR TENURE?

General Tips about eCV: Refer to the eTalus Curriculum Vitae Sections document.
- Ensure sufficient detail of activities and achievements in all pertinent areas of the CV, such as:
  - **Academic appointments:** The (professorial) title with rank from the UT Health SA – Assistant Professor, etc. Non-Academic appointments are other titles, from such as the hospital - Active Member of Hospital Staff, Board member, etc.
  - **Administrative Responsibilities:** Essential area to detail roles such as Director, Site Director, Co-Director, Administrative and Professional titles, Vice Chair, etc. Usually are academically-affiliated roles with some leadership responsibilities. Add succinct role description with quantity/frequency details.
  - **Patient Care:** Describe quantity/frequency and each site of inpatient and outpatient care whether concomitant teaching occurs or not. Teaching during patient care should be listed/addressed in the TEACHING section, listing inpatient and outpatient sites/educational activities separately.
- Ensure the Personal Reflective Narrative was eliminated from the beginning of the eCV (if previously included).

**PACKET:** Compile and bookmark contents (blue) according to the order listed below. Enable packets for both Highlighting and Comments. Upload final pdf packet to InfoReady. Deliver the original packet with the signed Coversheet to Faculty Life, Ensuring the faculty member and all the related leadership have already signed the Coversheet up to the level of the LSOM PTAC Chair.

- **LSOM PTAC Coversheet**  Complete the new coversheet: CURRENT FACULTY PROMOTION/TENURE.
- **Department Chair Letter**  should be addressed to the LSOM PTAC.
- **Department PTAC Letter**  should be addressed to the Department Chair and to the LSOM PTAC.
- **Detail List - Letters of Support:**  Include name, title, rank, affiliated institution/entity for each individual on the list. See below: Organize into THREE separate categories. Bookmark letters in each category as shown under Extramural. Note: Letters of Support should be on letterhead, signed, and (excluding trainee letters) from an individual with faculty rank at or above that requested for this promotion.
  - **EXTRAMURAL:**  4-6 Letters
    1. Name (Letter 1.)
    2. Name (Letter 2.)
    3. Etc.
  - **INTRAMURAL:**  4-6 Letters
  - **TRANEES/FORER TRAINEES:**  1-3 Letters
- **Curriculum Vitae:** eTalus CV – Bookmark following the Scholarship Showcase (See Directions below.)
- **Signed Faculty Verification of Curriculum Vitae Content** – to verify eCV details are up to date.
  - Check that the final eCV version to be included in the LSOM PTAC packet is the eCV version verified by the faculty member. This means that the signature date on the CV Verification Statement is ON or AFTER the date on the eCV, i.e. THAT particular eCV version was verified.
- **Personal Reflective Narrative:**  written by the faculty member - 11 font Arial, 3-page maximum
- **Criminal Background/Sanction Check Clearance Email**  - dated within 9 years.
**EMERITUS** WHAT IS THE ADMINISTRATIVE STAFF ROLE IN PREPARING THE LSOM PTAC PACKET FOR EMERITUS?

- **Reference:** EMERITUS HOP 3.1.3
- **Remember:** Emeritus Professor nominees must meet the established institutional criteria. Emeritus Professor is an honorific title that does not confer faculty reappointment.
- **Remember:** If a reappointment to the faculty is desired, the Emeritus Professor will become a ‘return to work retiree’ and a faculty appointment position must be created for them in the Human Capital Management system, using one of the Non-Tenure Track Professor titles, unless Adjunct Professor (without pay) is used. The Emeritus Professor title can be referenced by the retiree or by us, and used in their signature block whether or not reappointed to the faculty.

**PACKET: COMPILE** and **BOOKMARK** contents (blue) according to the order listed below. **ENABLE packets for both Highlighting and Comments.** **UPLOAD** final pdf packet to InfoReady. **DELIVER** the original packet with the signed Coversheet to Faculty Life, **ENSURING** the faculty member and all the related leadership have already signed the Coversheet up to the level of the LSOM PTAC Chair.

- [ ] Emeritus Packet Coversheet  Complete the new coversheet: EMERITUS.
- [ ] Department Chair Nomination Letter should be addressed to the Department Chair and to the LSOM PTAC.
- [ ] Department PTAC Letter should be addressed to the Department Chair and to the LSOM PTAC.
- [ ] Detail List - Letters of Support: Include name, title, rank, affiliated institution/entity for each individual on the list. See below: Organize into THREE separate categories. **Bookmark** letters in each category as shown under Extramural. Note: Letters of Support should be on letterhead, signed, and (excluding trainee letters) those holding the faculty rank of Professor or equivalent.
  - **EXTRAMURAL:** 4-6 Letters from esteemed ‘senior faculty outside UT Health SA,’ documenting the candidate’s broadly recognized (national, international) outstanding leadership and distinction in their field.
    1. Name (Letter 1.)
    2. Name (Letter 2.)
    3. Etc.
  - **INTRAMURAL:** 3-5 Letters from UT Health SA faculty members (usually all at Professor rank and tenured)
  - **ALUMNAE TRAINEES:** 0-3 Letters when indicated
- [ ] Curriculum Vitae: **Bookmark** eTalus CV main section titles only:
  - General Information
  - Teaching
  - Research
  - Service
- [ ] Signed **Faculty Verification of Curriculum Vitae Content** – to verify CV details are up to date.
  - Check that the final eCV version to be included in the PTAC packet is the eCV version verified by the faculty member. This means that the signature date on the CV Verification Statement is ON or AFTER the date on the eCV, i.e. THAT particular eCV version was verified.
- [ ] Criminal Background/Sanction Check Clearance Email – (New)
INITIAL – SENIORITY  WHAT IS THE ADMINISTRATIVE STAFF ROLE IN PREPARING THE LSOM PTAC PACKET FOR AN INITIAL FACULTY APPOINTMENT WITH ‘SENIORITY’?

- **Clarification:** ‘Seniority’ means that the faculty member’s rank is above assistant professor **AND** the percentage effort is 75% or greater
- **Remember:** In order for the offer letter to have included a faculty title with ‘seniority’ in rank and/or tenure, the Department PTAC should/would have already reviewed the faculty candidate’s credentials during recruitment, and by doing so, inform the Chair about the rank and tenure appropriate for this particular candidate’s initial faculty offer and appointment.
- **This LSOM PTAC packet** must be developed in parallel with the UT Health Careers Initial Faculty Appointment packet through which the faculty appointment becomes effective. The LSOM PTAC must affirm the seniority rank offered to and accepted by this new faculty member by reviewing this packet.

**PACKET:** **COMPILE** and **BOOKMARK** contents (blue) according to the order listed below. **ENABLE packets for both Highlighting and Comments.** **UPLOAD** final pdf packet to InfoReady. **DELIVER** the original packet with the **signed Coversheet** to Faculty Life, **ENSURING** the faculty member and all the related leadership have already signed the Coversheet up to the level of the LSOM PTAC Chair.

- Check that the signature date on the CV Verification Statement is **ON or AFTER** the date on the CV, i.e. **THAT** particular CV version was verified.

- **Initial Seniority Packet Coversheet** Complete the **new** coversheet: INITIAL FACULTY APPOINTMENT WITH SENIORITY.
- **Department Chair Letter** should be addressed to the LSOM PTAC.
- **Department PTAC Letter** should be addressed to the Department Chair and **to** the LSOM PTAC.
- **Support Letters or Interview Transcripts** should become a **single bookmark.** These are the same 3 letters or Search Committee interview transcripts collected by the Search Committee during the candidate selection process.
- **Curriculum Vitae:** Use the same CV as used in the Search/Application process. **No further bookmarking** is needed.
- **Signed Faculty Verification of Curriculum Vitae Content** – to verify eCV details are up to date.
  - Check that the signature date on the CV Verification Statement is **ON or AFTER** the date on the CV, i.e. **THAT** particular CV version was verified.
INTERNAL PROMOTION  WHAT IS THE ADMINISTRATIVE STAFF ROLE IN PREPARING THE PACKET FOR LSOM DEAN VETTING OF THE INTERNAL DEPARTMENT-LEVEL PTAC DECISION TO PROMOTE A CURRENT FACULTY MEMBER?*

• **Clarification:** ‘INTERNAL’ department-level PTAC FACULTY PROMOTION decisions apply only when the faculty member being proposed for promotion has an appointment at any rank, **but** is below 75% effort, OR currently holds an Instructor title (by definition Non-Tenure Track) and promotion is sought to an Assistant Professor title on Non-Tenure Track.

• **Note:** To propose the PROMOTION of a faculty member from an Instructor title on Non-Tenure Track to an Assistant Professor title on Tenure Track, contact Faculty Life for related Standard Operating Procedure.

**PACKET:** **COMPILE** and **BOOKMARK** contents (blue) according to the order listed below. **ENABLE packets for both Highlighting and Comments.** **UPLOAD** final pdf packet to InfoReady. **DELIVER** the original packet with the **signed** Coversheet to Faculty Life, **ENSURING** the faculty member and all the related leadership have already signed the Coversheet up to the level of the LSOM PTAC Chair.

☐ **Internal Promotion Packet Coversheet**  Complete the new coversheet: INTERNAL PROMOTION.

☐ **Department Chair Letter**  should be addressed to LSOM Dean.

☐ **Department PTAC Promotion Justification Letter**  should be addressed to the Department Chair. (The Division Chief may write the letter instead of the department PTAC, but the department PTAC must affirm the letter and Promotion request.)

☐ **Curriculum Vitae:** **Bookmark** eTalus CV main section titles only:
  - General Information
  - Teaching
  - Research
  - Service

☐ **Signed Faculty Verification of Curriculum Vitae Content** – to verify eCV details are up to date.
  - Check that the final eCV version to be included in the PTAC packet is the eCV version verified by the faculty member. This means that the signature date on the CV Verification Statement is **ON or AFTER** the date on the eCV, i.e. THAT particular eCV version was verified.

☐ **Personal Reflective Narrative** written by the faculty member - **11 font Arial, 3-page maximum**

☐ **Criminal Background/Sanction Check Clearance Email** - dated within 9 years.