Tips for using RPT

We will still rely on our "Dossier Checklists" to clearly communicate dossier requirements and link to the document templates.

- **New CHECKLISTS** will tell you what documents you need and where you will upload each one in the system.
    - There are two tabs/two sections of the application – be careful!
    - Be Careful not to upload any *required* documents in the "Department Materials" section on the first tab/screen – you will be naturally inclined to go there – fight that urge! And follow the User Guide and the Checklists.

  NOTE:

  RPT templates are defined by a slightly different classification and in most cases, the rank (Assistant, Associate, Full) is not specified in the RPT classification.

  RPT requirements are defined as "document categories" rather than the names of specific document types and more than one document type may satisfy the requirement of a document category.

- **Personal Statement** is now a required *document type/category* for ALL FT actions (but in PSOM we only require a true Personal Statement for Promotions and senior rank new appointments. SO what will you use to fulfill this requirement:
    - **Assistant rank Appointments** – cover letter from search – download from FS
    - **Reappointments** – you will upload the Academic Plan in that required spot (because candidate participates in creation and signs it)
    - **Promotions and senior rank Appointments –** Use the personal statement

- **Teaching Documentation**
    - is uploaded in two places for **Promotions** –
        - Summary Statement/letter from Academic Programs in the Teaching report section
        - Complete EDB (with same letter) in the Teaching Data section
    - For **reappointments –** upload the EO letter/Report with the data as one document in the Teaching Report section.
    - **AC Assistant rank new appointments**
        - RPT requires a document be uploaded. We have created a template for a brief document to acknowledge the lack of formal assessment available (what you used to put in the Chair's Letter) in the event you cannot get a letter of assessment from the home institution.

- **<u>All reference and recommendation letters</u>** no matter the type are uploaded to the same place in RPT "<u>External Evaluations</u>" – please do not get distracted by the word "External."
    - All Recommendation letters (even if you need two internal and two external letters – like for CE Assistant rank new appointments)
    - Intramural Letters (letters from faculty in other departments or other schools here at UPENN or perhaps from a person they had wanted to use as an Extramural Consultant but who didn't qualify for that process…) will go here.
    - Peer References from AC track promotion – the template responses print out from REDCap go here – *saved & uploaded as one document*.
        - NOT Clinical Eval Summary – this has its own designated spot
    - NEW for Clinical track Asst. rank Appointment – 1 rec. letter is now required

- **<u>Appointment to Associate Professor on the Tenure track but without Tenure</u>:**
    - No more extramural Consultants!
    - In RPT they are treated basically the same as a new Assistant rank Tenure track appointment "Appointment Standing Tenure without Tenure".
        - Rec letters are required – 4 total: 2 internal 2 external (same as Assistant)
        - Dossier will have a personal statement & you will upload that to the Personal Statement section
        - You will also need to upload Teaching Documentation from the home institution (this will not be identified *in the system* as required, so you will need to handle it as an "<u>optional Document</u>"
            - Remember, the Dossier Checklist will tell you what the dossier requirements are and will tell you where to put it.

- **<u>OPTIONAL DOCS</u> – (Document which the Dossier Checklist indicates is needed, but RPT *System* does not require it and therefore there is no designated spot)** These documents **are** always uploaded to the Department Materials section on the Case Materials screen (first tab). This is the only thing you will ever upload here! Only use for documents that have no designated space in the system to upload!
    - Ex.) New appointment on the AC track internal candidate at a higher rank may need Clinical Evals, but the system is not set up to "require" this, because it is not 100% true in all AC Appointment situations. SO, the Clinical Eval Summary Doc. is treated as an "Optional Document" and uploaded in this section.

General Best Practices

- **Naming conventions are important –** RPT indicates a required document type – you must accurately NAME it when you upload it to that spot.
- **Always know your vote –** in addition to having it on the Chair's Rec. letter there is now a form you must fill out – yes & no counts only!
- **GET electronic signatures!**
    - It is really important that whenever possible you upload "original" WORD docs or writable/editable pdf (rather than scanned image pdf). Electronic signatures will really help with this!
- **Follow-the new CHECKLISTS –** this will help you to identify the correct place to upload the required dossier documents!
    - Be Careful not to upload any required documents in the "Department Materials" section on the first tab/screen – you will be naturally inclined to go there – fight that urge!
    - There are two tabs – be careful!
- **Think about how you are going to organize yourself**
    - DCOAP needs are the same – you draft documents and take them to the meeting
    - Have a folder on your computer for each candidate – there will likely be multiple versions of these draft documents.
        - Make sure you know which one is the final – as you will need this for your own copy of a final dossier.
    - You won't be making copies to bring over - if you want a hard copy for yourself you will need to print that out – but make sure it is truly the final, approved version of the documents.
    - We will be able to review dossier documents in the system and send it back for revisions. Each of will work out together what works best for us - whether we handle revision messaging outside of the system or within the system – we will experiment together and see what seems best.