**ACRS Pilot Feedback and Questions:**

Q1: What happens if a new document is uploaded to Digital Measures after the bio-bib is created and uploaded to ACRS?  For example, if a dossier is submit with a bio-bib hyperlink to Document A (the draft version of a publication uploaded in DM) and then after the review begins, Document B (the page proofs) is up loaded.  And then later in the review process, Document C (the final copy with page numbers, citation information, etc) is uploaded.  Does the new document automatically appear on the bio-bib or would a new bio need to be run?

·         This will be a topic that will impact the MCA and Promotion review committees (so not this round of ACRS cases).  We have had several situations where the status has changed and the candidate wants the next level of review to use the status.  The next level of review needs to know that the status has changed.

Answer: Currently, the link is not updated in biobib when the file is replaced in Digital Measures. The faculty are advised to upload the final copy in ACRS and other universities have opted this approach. However, if a faculty wants to upload a supplemental Biobib, they may upload it in a separate section school staff opens for them once they contact the staff.

Q2. Can ALL items uploaded be hyperlinked on the bio-bib?  For example, presentations, materials uploaded with special pedagogical activities, professional articles about you, etc.  This would reduce the need for supplemental materials to be uploaded to ACRS separately.  There may be some materials that do not have place to upload in DM, but those that do would be accessible from the bio-bib.

Answer: Yes, they are hyperlinked on biobib.

Q3. Based on feedback regarding in person PS meetings, can a request be added to the ACRS process?  For example, after receiving the notice of the review and instructions for uploading materials, the candidate could be given an option to request a meeting with their APC and/or Admin Staff.

Answer: Yes, we can have a separate form built which the candidate should fill and then the school AP Staff may receive it and schedule meetings for the AP Chair and candidate.

Q4. The Committee Manager emails were not sent as “confidential”.  If the email comes from the APC or Admin Staff, then it does not need to be kept confidential, but the committee members do.

 Answer: We can have a bold red instruction for them to not contact the candidate, instead email the school admin from the system. This request has been added in the feature request list for interfolio to work on so that the button is disabled or something around those lines.

**Pilot Candidate Session:**

Pilot candidates’ comments and important notes:

1. If you have a file above 100 MB, please use the “Small PDF” software to shrink the PDF files.
2. Chrome is the best web browser for ACRS.

Q5: Possible process issue- If a hyperlink file is established in ACRS for a file instead of an upload> concern regarding content control; e.g. if a link is made to another webpage for CV, link made and submitted 4/1/17, review doesn't happen until 10/1/17 but CV gets updated in 9/1/17, content is not consistent to 4/1/17 submission content?

Answer: Answered in Q1.

Q6. DM integration is on the want list specifically bio-bibs. Dr. Schnier- can bio-bibs seamlessly be imported to ACRS without the download from DM >upload to ACRS; request would be to have the ability to review and approve bio-bib.

Answer: Yes, that’s the plan and will be worked upon for the full-blown roll out.

**AP Chairs and Review Committee Members Session:**

Q7. what capacity will support staff be able to provide chairs?

Answer: School staff can provide support to AP Chairs , committee members, similar to what they have been providing, **outside the system**, based on Dean’s analysis of their workforce.

Q8. Can templates be made unit by unit eventually for the rollout?

Answer: Yes, technically they can be made on a unit by unit basis. As our goal, we strive for standardization, the justification for this would have to be discussed further. We do plan to have diff templates for diff title series.

Q9. Ad hoc steps, eg. Candidate wants feedback regarding self-statement, should that happen outside the system? Can ACRS have the ability to do drafts and create input within the system rather than outside the system (wish list).

Answer: Currently the feedback cannot be provided within the system. This has been added to the Feature list and submitted to interfolio.

Q10. Who is responsible for procedural safeguard meeting if requested by candidate? {AP Chair} Scheduling, how is AP chair notified? {should be notified by the school AP} How is the meeting going to be scheduled? Concern with lack of personal interaction. Concern: AP SNS chair, assurance that candidate truly understands all the steps (in person meeting). Some of the chairs will reach out to candidates even if a meeting is not requested by candidate because the chair may feel the candidate would benefit from such a meeting. David suggested a work-around by adding a step(s) in ACRS to meet this need.

Answer: VPF to address this with AP chairs.

Q11. Can a step be added so a meeting requirement is required as a checkbox by AP chair and possibly candidate (?)? AP SNS chair's idea: Two required gates: a) after case is completed/submitted (before vote) require a meeting and b) one after the vote; required face to face meeting

Answer: One checkpoint is added when the case is submitted by the candidate. The candidate can request for a meeting if they wish to while submitting the case. VPF to address this in detail with AP chairs.

Q12. Concerns: How are exclusions handled? Who reviews exclusion? Can AP chair see who the exclusions are? Exclusion procedure may need to be developed?

Answer: School AP Staff step will be added before the case goes to review committee to check for exclusions. AP Chair doesn’t see the exclusions. When the candidate enters the exclusions, and submits the case, school AP staff will go ahead and enter the review committee members. This way the excluded members don’t receive the candidate materials.

Q13: What's the right procedural process? Exclusions need to be part of procedural process, who does the work, AP school analyst, Dean, VPF, Provost? -Should this be done by School AP Analyst before it is moved to AP chair. Eg. Exclusion may be AP chair- how do you handle that?

Answer: Yes, school AP analysts would take care of exclusion process. More details in the answer for Q12.

Q14) Annotations download should be linked with the sections of the document. (Dr. Burke request)

Answer: This has been added to the feature wishlist.

Q15. Concern with committee members accidentally communicating with candidate. Request to build feature in ACRS to disable communication ability with candidate. Concern with committee chair also emailing candidate, disable email feature request.

Answer: in the “committee details” section, we would put in a warning for committee members to not use the “email candidate” button. Instead they would only email the school AP staff to request candidates for additional materials. School AP analysts would then unlock the section for the candidate to enter the additional materials.

Q16. Live chat feature for support requested by chair.

Answer: At this time, live phone is available from 8 am to 6 pm PST.

Q17. Who/when uploads minority report (if applicable)? Where is it uploaded?

Answer: A minority report is uploaded by the Faculty voters who will be provided committee manager access. However, AP Chair would be sending the case forward. Faculty Voters would have to send it to us and we would upload it for them. System workaround: Make two committees. Second one with the AP Chair manager only.

Q18. How are votes recorded when a case file is submitted for multiple appointments, eg. MCA and reappointment, or votes for two different steps within the case file? ACRS has the ability to record both votes under the voting section,

Answer: just select 'add new vote'

Q19. Explain unlocking feature for managers.

Answer: Committee Managers can unlock sections.

**CAP Session**

Q20: Who are the committee members? Who creates the committee members?

Answer: Committee Members are added by the school AP analysts. Committee members can be the review committee members, faculty voters, etc. They only have the read-only access. However, Committee managers have full access to upload the case materials and send the case forward.

Q21: How did you make annotations? (Ignacio)

Answer: This has been demonstrated during the pilot.

Q22: How are files downloaded: zip file vs PDF? Is an index available like PDF portfolio?

Answer: Files can be downloaded in both ways. Either a single PDF that has all the files merged together or a zip file with separate documents.

Q23: When APO forwards to CAP, who is able to see files? Would it be helpful to see what's coming down the pike?

Answer: Give Simrin access = to APO level

Q24: How should we do drafts for CAP report?.

Answer: Outside the system as its been done. Interfolio is looking at ways to edit documents within the system.

Q25: Request: Integration with DM. The task of checking and double checking should be eliminated with this integration.

Answer: Integration with DM is being worked on. However, its not available for Pilot.

Q26: If I have two or more accounts, how can I merge the accounts? David indicated to send Interfolio a request to merge emails.

Answer: Please send the request to [acrspilot-help@interfolio.com](mailto:acrspilot-help@interfolio.com) to merge the accounts

Q27: Automated verification?

Answer: Please elaborate on this question

Q28: Create a separate template for first review (assistant prof or new UC professor), require a face to face meeting for procedural safeguard. 90-99% of procedural safeguard meeting is pro forma for cases thereafter. Eg. Have a face to face meeting when CAP/Chair composes a difficult transmittal memo is preferred. Should this be part of eligibility notification or built in the system?

Answer: The APO team will be reaching out to candidate and schedule meeting between AP chair and candidate if the transmittal memo is difficult/sensitive. It will not be shared with candidate directly first.

Q29: AP Recruit integration to ACRS?

Answer: This is a possibility and will be worked upon before the full roll out.

**Deans/Provost Session**

Q30: Can the dean send back the case file?

Answer: yes

Q31: Level of security?

Answer: Interfolio uses Amazon servers. The security is a step above Box.

Q32: Merit Short form, can a checkbox be incorporated? Use the 'Send Forward' as the checkbox acknowledging the 'I concur with...' statement on short form.

Answer: Currently it’s not available. But, this can be added in the feature list. Workaround : There is no form per se. Include in the instructions in the committee details tab and activity log can reflect the “Send forward” so that the Deans need not upload the “I concur with Document”.

Q33: Gregg and Tom need access the same time as CAP, is this built in?

Answer: We can add Gregg and Tom to CAP. Need more clarification from Gregg and Tom if they need this.

Q34: What does the structure of the case file look like?

Answer: This question was clarified during the demo.

Q35: Teaching evaluations, where are they stored? Publications? Bio-bibs? Syllabi? Presentations?

Answer: Teaching Evaluations, syllabi, presentations and all of them are stored in DM. These will be hyperlinked in biobib.

Q36: Research from cayuse, can we pull research documents? Still in the works?

Answer: Cayuse currently cannot provide us the spreadsheet to upload in DM.

Q37: How can we differentiate between the material that was submitted for last review period from this review period on the bio-bib?

Answer: APO marks the materials administratively reviewed for publications.

Q38. Service contributions?

Answer: APO doesn’t mark them admin reviewed. But this is noted.

**Non ACRS related: More Process and Content related Comments**

Comment: ‘Workflow standpoint of ACRS looks good’.

Comment: AP Chair’s responsibility to upload the notes in voting section I there are any negative votes for the case.

Comment: The responsibility regarding the case file falls on the candidate for accuracy.

Q39: Can ad hoc provision be set up?

Answer: yes.

Q40: Can a faculty member give access to another faculty?

Answer: Not for pilot.

Q41: Eg. What if candidate has a mentor off-campus, can they provide input in ACRS as a user

Answer: yes.

**Debrief Session:**

Next Steps:

* ACRS Pilot kick off email to all the faculty
* Working session with the school AP for creating cases for pilot candidates: Week of May 8th
* Walk in sessions for pilot faculty candidates: All the feedback received will be saved in a centralized location
* VPF to conduct a meeting with AP Chairs regarding addition in their duties and other concerns raised.
* Add checklist for candidates to perform steps outside the system in ACRS.

**Defining Success**

Process:

1. Were there any other steps performed outside the system except the following (Need more specifics from schools)
2. Number of faculty requests with similar need

Product:

1. Number of system glitches.
2. Time saved by school AP Admins (Need more specifics from schools)
3. Number of touch points for key steps

**A few important comments made by the vendor:**

1. Feedback collaboration between candidate and chair before submitting the case.

David: Dossier feature is available for only the candidates. 20% upcharge for this feature. Q3 (September 1st) of this year.

1. We may add link to Box in ACRS if we want online collaboration on a certain document.