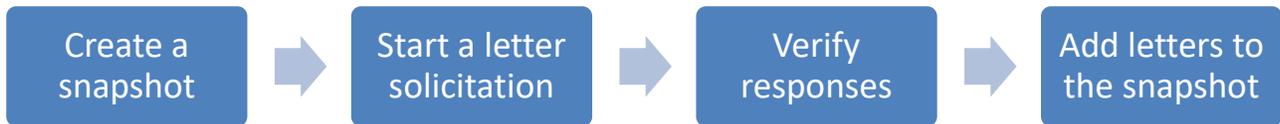


Please refer to the CALL <https://academicpersonnel.ucr.edu/the-call> for the most current guidelines on Extramural Letters.

This feature allows the department to solicit extramural letters electronically and for referees to provide their letters directly to the eFile Plus system. In the eFilePlus system, Extramural Letters are collected from within a Snapshot.



Create a Snapshot (review)

1. Log in as a File Preparer.
2. Click on "Manage Candidate Reviews"



3. Use the yellow plus symbol  to create a new Review for a candidate. You may choose any candidate who is listed in your "Manage eFiles" page.



Note:

- Your new Review should be listed similar to the screenshot below:

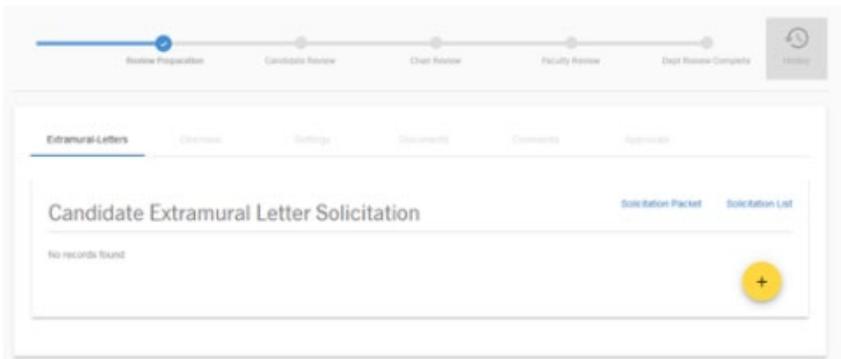
Manage Candidate Reviews

Name	Department	Title	Action Type	Review Year
Eric Martin	Application & Creative Service	Associate Director, Demand Management	Career Review	2018-2019
Erich Reick	Philosophy	Professor	Advancement to Professor ABOVE Scale	2017-2018
Brandon Ayers	CSC Associate Vice Chancellor	Manager, Campus Web Solutions	Career Review	2018-2019
Reza Ableschier	Mechanical Engineering	Distinguished Professor, Mechanical Engineering	Career Review	2018-2019
Michael Vandenberg	Graduate School Of Education	Associate Professor	Career Review	2017-2018
Alex Gerry	Entomology	Prof. of Entomology and Extension Specialist	Career Review	2018-2019



Create a Letter Solicitation Request for the Review

1. For your candidate, click on the menu icon and choose "Edit".

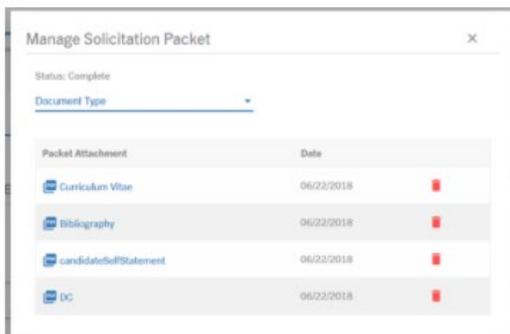


2. Click the link for "Solicitation packet". Using the "Manage Solicitation Packet" screen, upload a Curriculum Vitae PDF and a Bibliography PDF. Choose the Document Type and then drag-and-drop the PDF file into the window.



Note:

- Uploaded documents to support the Solicitation Packet will look similar to the screenshot below:



3. Add Referees by completing the required form fields.

Note:

- When adding referees, please consider the following:
 - Add 5-6 referees
 - Add referees that were suggested by the candidate, department, and both
 - Include referees that are from UCR and from other institutions
 - Edit each referee's letter to be unique in some way.
 - Choose a "Letter Due Date" that is several weeks into the future

4. Click "Edit Letter" to modify the template letter. The modified template will be saved and used for other solicitation letters, therefore you will still need to click "Edit Letter" for every solicitation letter to check for accuracy. Verify that the correct template is displayed for the type of Review.

- Add a "Header" in the Department Information area at the top of the letter window.
- Add a "Footer" in the Solicitation Letter signature area at the bottom of the letter window.
- Click the Save button. Verify that the Status of the letter is noted as "Status: Completed".

Edit Referee ✕

Suggested Year Prepared (Required) 2018-2019	Suggested By (Required) Candidate
Enter Name or NetID (Required) Mark Jones	
First Name (Required) Mark	Last Name (Required) Jones
Degree(s) Ph.D.	Title (Required) Professor of Chemistry
Department (Required) Department of Chemistry	Institution (Required) Rochester University
Country United States	Address 1313 Mockingbird Land
City Riverside	State CA
Phone Number (760) 834-0929	Zip 92521
E-Mail Address (Required) eric.marin@ucr.edu	
Solicitation Letter Template (Required) Career Review	Status: Completed
Research Description (Required) Chemical bonds research	Letter Due Date (Required)

✕ Edit Letter

Important:

- The letter templates are the same as the Model Letters in the CALL.
- The Chair may add to the language in the template.
- Check the letter template for completeness.
- The candidate's name will be auto-populated.
- The file preparer will need to adjust references to his/ her

5. Scroll to the bottom of the window and click the "Save & Send Request" button to send the Requests to the referees. The status will change to "Request Email sent".

Candidate Extramural Letter Solicitation Solicitation Packet Solicitation List

Referee	Institution	Research Description	Suggested By	Due Date	Status	Date Request Sent - Received	Letter ID	
Mark Jones	Rochester University	View	Candidate	09/01/2018	Request Email sent	07/05/2018 -		...
Jennifer Moses	University of Texas, El Paso	View	Candidate/ Department	09/01/2018	Request Email sent	07/05/2018 -		...
Eric Chronister	University of California, Riverside	View	Candidate	09/01/2018	Not Sent	07/05/2018 -		...
Paul Garcia	University of California, Berkeley	View	Candidate/ Department	09/01/2018	Not Sent	07/05/2018 -		...
Julius Henderson	University of Waterloo	View	Department	09/01/2018	Not Sent	07/05/2018 -		...



Verify the response from the referees

1. For each letter received, you may view the letters by clicking on the links (Redacted/Unredacted).

Important:

- You may need to refresh the Candidate Extramural Letter Solicitation page in order to view the letters and updated status.
- Uploaded PDF letters are saved by the system as Unredacted. Make sure to save a Redacted copy before forwarding the snapshot for review.
 - Click on the menu button and click Edit

Referee	Institution	Research Description	Suggested By	Due Date	Status	Date Request Sent - Received	Letter ID	Include in Review
Juanita Jackson	UC Riverside	View	Department	07/17/2019	Received Redacted/Unredacted Letters	04/25/2019 - 04/25/2019		Redacted Unredacted Preview Email
Kevin Ting	UC Riverside	View	Department	07/23/2019	Declined Response	07/23/2019 -		Decline Reason Edit Remove
Sumita Roy-Choudhury	UCR	View	Candidate	07/24/2019	Letter Received	07/23/2019 -		? ?
Sara Small	UCR	View	Candidate	07/25/2019	Declined Response	07/23/2019 -		? ?

- Check "Show Attachments" and upload the redacted PDF. Then click "Save Without Sending Request".

2. For a declination, you may view the "Decline Reason" link to see the response time from the referee.
3. The system will assign a unique Letter ID to all responses.

Note:

- The "Letter ID" is automatically created when a response is received, but can be changed by the File Preparer.
- The Letter ID cannot be the same for two different letters.
- There is no limit to the number of letters.
- The writer can submit both by uploading a PDF or writing text.
- The link does not expire after letter submission - only after the expiry date associated to it.
- If the referee has submitted more than once, then the most recent submission shows as active.
 - Previous submissions are inactive and cannot be viewed.

Candidate Extramural Letter Solicitation [Solicitation Packet](#) [Solicitation List](#)

Referee	Institution	Research Description	Suggested By	Due Date	Status	Date Request Sent - Received	Letter ID			
Mark Jones	Rochester University	View	Candidate	09/01/2018	Declined Response	07/05/2018 -		Decline reason		...
Jennifer Moses	University of Texas, El Paso	View	Candidate/ Department	09/01/2018	Received Redacted/ Unredacted Letters	07/05/2018 - 07/09/2018	A	Redacted	Unredacted	...
Eric Chronister	University of California, Riverside	View	Candidate	09/01/2018	Received Redacted/ Unredacted Letters	07/05/2018 - 07/09/2018	B		Unredacted	...
Paul Garcia	University of California, Berkeley	View	Candidate/ Department	09/01/2018	Received Redacted/ Unredacted Letters	07/05/2018 - 07/09/2018	C	Redacted	Unredacted	...
Julius Henderson	University of Waterloo	View	Department	09/01/2018	Not Sent	07/05/2018 -				...

4. Verify the following items on the Solicitation List by clicking the Solicitation List link.
 - List includes each letter writers name, department, institution, and research area
 - Letter writers are listed according to the entity that suggested them
 - The last section of the list includes a summary count



Adding the Letters to the Snapshot

1. Log in as a File Preparer and go to Manage Candidate Reviews
2. Select a candidate and click on Extramural Letters.

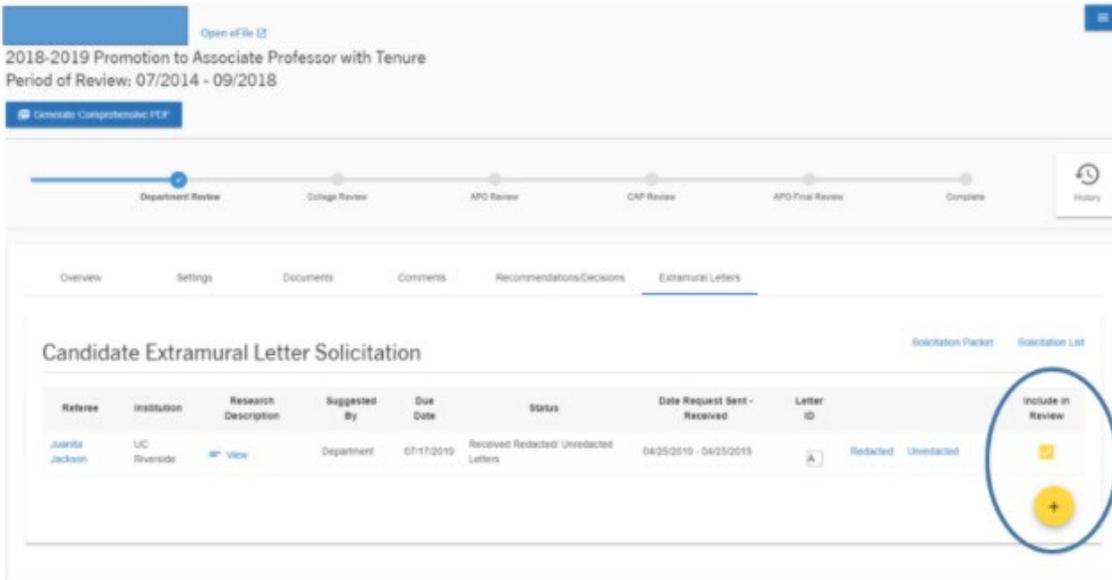
2018-2019 Promotion to Associate Professor with Tenure
Period of Review: 07/2014 - 09/2018

Department Review College Review APO Review CIP Review APO Final Review Complete

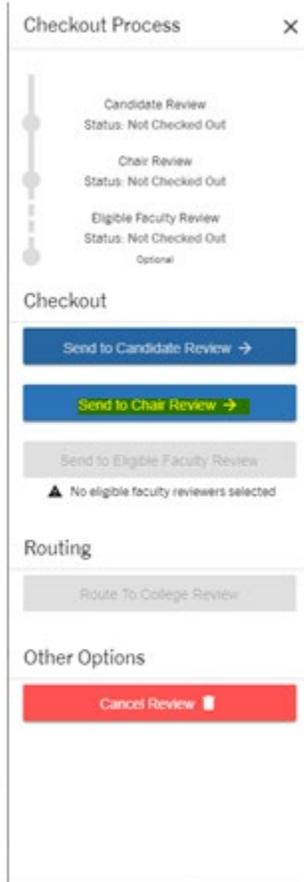
Overview Settings Documents Comments Recommendations/Decisions **Extramural Letters**

Letter	Suggested By	Date Received
Letter A	Department	0425/2019

- To include a letter, check under Include in Review. If you do not want to include the letter, leave this unchecked.



- Click on the check-out box and then click "Send to Chair Review".

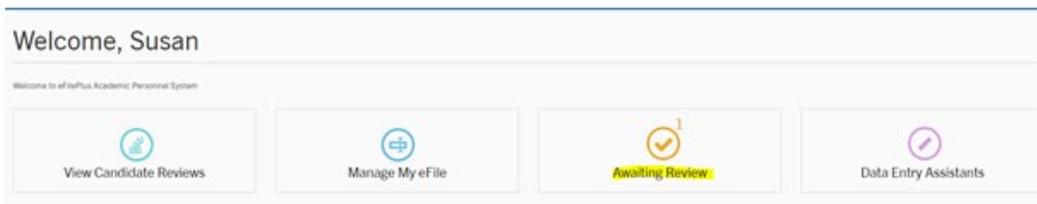


Note:

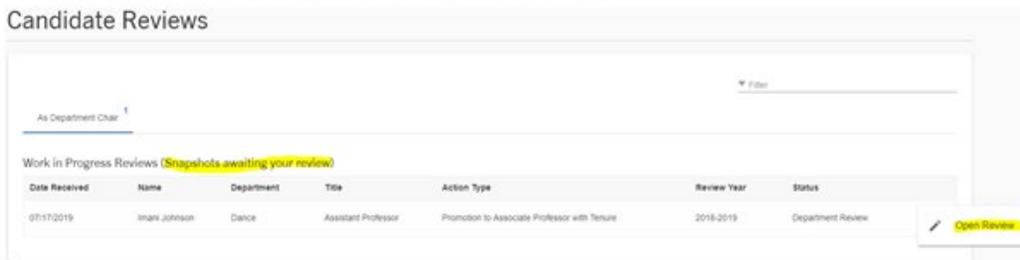
1. If you click *Cancel Review*, the Snapshot along with the letters will be cancelled and will no longer be available. Make sure to save a copy of the letters as appropriate.
2. In the event that additional letters are requested during the course of the review, this will need to be managed offline and uploaded under *Documents > Extramural Letters*.
3. Edit availability
 - Once the Snapshot is routed, the File Preparer view of the Extramural Letter tab will change to read only.
 - The option to edit and send letters will not be available.
 - Make sure the file is complete before routing.
 - When the Snapshot is retrieved from the Candidate, Chair, and Faculty reviewers, the option to edit will be available.
 - Once the Snapshot is checked out to the Dean, the File Preparer will not have the option to edit.

What Reviewers See

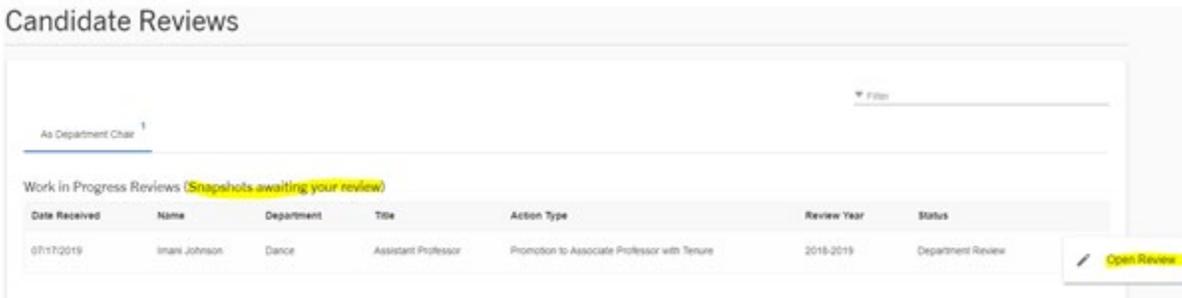
1. The reviewer signs in to eFilePlus and clicks on "Awaiting Review".



2. The reviewer opens the Snapshot awaiting their review.



2. The reviewer opens the Snapshot awaiting their review.



3. The reviewer selects and clicks the Extramural Letters tab. To view the letter, click on the letter.

Note:

- The candidate does not have access to the Solicitation List. All other reviewers can view the Solicitation List.

2018-2019 Promotion to Associate Professor with Tenure
Period of Review: 07/2014 - 09/2018

[Generate Comprehensive PDF](#)

Overview Documents Comments Actions **Extramural Letters**

Letter	Suggested By	Date Received	Solicitation List
Letter A	Department	04/25/2019	

These are general system guidelines and is not meant to replace policy. Please refer to the CALL for the most current policy information: <https://academicpersonnel.ucr.edu/the-call>.