

## Official Portfolio Checklists can be found here:

Tenure and Tenure Stream Portfolio: <https://www.medfaculty.pitt.edu/checklist-preparation-faculty-portfolios-appointment-and-promotion-tenure-conferral-tenure-or>

Appointment Stream Portfolio: <https://www.medfaculty.pitt.edu/checklist-preparation-faculty-portfolios-appointment-and-promotion-appointment-stream>

## Common Mistakes made during preparation of portfolios:

One of the most significant sources of delays during the promotion process is the preparation of the faculty portfolios and failure to correct the identified errors. Common errors that are identified and require correction are as follows:

1. **Documents don't match.** The specific details and dates MUST MATCH between the Department Chair letter, the Executive Summary, and the CV.

- Example 1: listing a teaching role or committee service work within the Executive Summary but not listing it on the CV.
- Example 2: listing Medical Director of ICU since 2017 in the Chair letter but listing the same position with a start date of 2016 on the CV.

2. **Recommendation is missing nomination information.** Clearly state the recommended nomination, including rank, department, tenure status, and pathway in all necessary documents (Chair Letter, Executive Summary, and Division Chief Letter (if applicable)).

3. **Faculty Appointment rank and/or dates are incorrect.** If information is not available within the Department, contact Faculty Affairs when working on the portfolio documents for a list of the candidate's University of Pittsburgh academic rank(s) and appointment dates. (Dates should match and be correct in all documents and reference Visiting status when necessary)

4. **Executive Summary formatting.** The Executive Summary should be in narrative form (third person) and not an outline of bullet points. The summary should be three to five pages in length and details and dates should match the details listed in the Chair Letter and CV. Executive Summary Guidance can be found here: <https://www.medfaculty.pitt.edu/executive-summary-supplemental-guidance>

5. **CV is not in SOM CV format.** Strictly follow all sections and provide detailed information as requested in the format.

- Information should be in chronological order (oldest to newest)
- Follow the publication guidance with no deviations
- Follow the Research Grant section with no deviations
- Follow the SOM CV format located at:  
<https://www.medfaculty.pitt.edu/sites/default/files/UPSOMCV32021.pdf>

6. **Referee information is incomplete.** A minimum of 12 external referee names should be submitted in the Henry table. Four additional referees can be internal but cannot be in the candidate's primary department. Referee names cannot be SOM Department Chairs, nor Associate Deans in OFA. Adjunct referees names cannot be from the same department as the candidate since they are considered internal. For tenure stream, tenure and endowed chair actions, the majority of referee names must be arm's length.

- Guidelines for External and Internal Letters of Reference can be found here: <https://www.medfaculty.pitt.edu/sites/default/files/Guidelinesforrefereesandarmlengthdefinition02132018.pdf> **See page 2 for Arm's length guidance.**
- Candidates should not interact or be in contact with referees once the process begins. Direct all inquiries to the Office of Faculty Affairs at [facaffairs@medschool.pitt.edu](mailto:facaffairs@medschool.pitt.edu)
- Suggested referees should be from various institutions

7. **Missing Teaching Evaluations.** Teaching documentation is **REQUIRED** of all promotions. Teaching evaluations can be obtained from these resources (where applicable)

- Office of Medical Education <https://www.omed.pitt.edu/>
- Graduate Office <https://somgrad.pitt.edu/>
- MedHub <https://upmc.medhub.com/>

**\*Also, for confidentiality, please redact any other faculty names within the documents that are not the candidates.**

8. **Missing/Incomplete Teaching Summary Form.** The teaching summary form at <https://www.medfaculty.pitt.edu/sites/default/files/TeachingSummaryForm.docx> is required for all appointments and promotions at the Associate Professor and Professor levels.

- The form should include teaching activities for the past **5 years** only.

- Note: Research prefix faculty (ex. Research Associate Professor) may be excluded from the teaching summary form and teaching evaluations, (if not applicable to the candidate).

**9. Missing/Incomplete Research Summary form.** The research summary form at <https://www.medfaculty.pitt.edu/sites/default/files/ResearchSummaryForm.pdf> is required for all appointments and promotions at the Associate Professor and Professor levels, including Research prefix candidate's.

- **The h-index MUST be generated from the Web of Science.**

Instructions on how to obtain the h-index are located at:

<https://www.medfaculty.pitt.edu/sites/default/files/ResearchSummaryFormInstructions.pdf>

**10. Impact Factor/Citation Report (for Tenure and Tenure Stream Actions Only).**

We have routinely experienced confusion with departments on submitting this document, so we changed the required documentation type and are now only requesting the Web of Science Citation Report.

- Include only peer-reviewed publications (CV sections 1 and 2 only)
- The new instructions can be found here:  
<https://www.medfaculty.pitt.edu/sites/default/files/ResearchSummaryFormInstructions.pdf>
- Save the Citation Report as a PDF by Right Clicking and Printing as a PDF

**11. New: Scholarship of Service Product Summary Form.** The scholarship of service product summary form at:

<https://www.medfaculty.pitt.edu/sites/default/files/Scholarship%20of%20Service%20Worksheet.docx> is an optional form that can be used to determine the number of publication equivalent scholarly products for your scholarship of service and demonstrate your scholarship of service products to committees. Traditional service should still be listed on the CV.

**12. New: Social and Digital Media Summary Form.** The social and digital media summary form at:

<https://www.medfaculty.pitt.edu/sites/default/files/UPSOM%20SoMe%20Promotions%20Form%202023.docx> is an optional form that can be used to aid faculty in quantifying their publication equivalent scholarly products for scholarship of digital and social media and demonstrate your scholarship of digital and social media to committees.

**13. Secondary Appointments:** For faculty seeking a secondary appointment or promotion concurrent with the primary appointment or promotion, be sure to request and include a nomination letter from secondary department.

For secondary promotions, be sure that the secondary appointment has contract dates that are current/up to date.