COLORADO STATE UNIVERSITY

Candidate Guide to Interfolio Review, Promotion, and Tenure

This document explains what a faculty member can expect during the review, promotion, and tenure process when they use Interfolio's Review, Promotion & Tenure (RPT) module. As a candidate, you will be asked to submit a packet of review materials through Interfolio. Before you begin, your department will create a case for you that includes instructions for submitting your packet with all the required documents and forms. You will be notified that your case is ready via email.
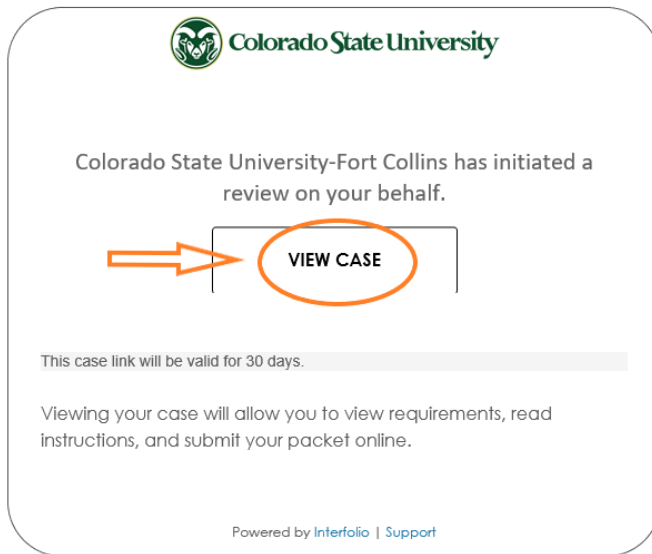
- Additional information and product help can be found here: https://product-help.interfolio.com/en_US/review-promotion-tenure
- Faculty are encouraged to complete Interfolio's E-Learning course here: https://product-help.interfolio.com/en_US/product-training#accordion307350

In this document:
- What does the notification email look like?
- How do I access my candidate account?
- How to view packet requirements
- How to add and edit files to your packet
- How to preview your packet before submitting
- How to submit your packet
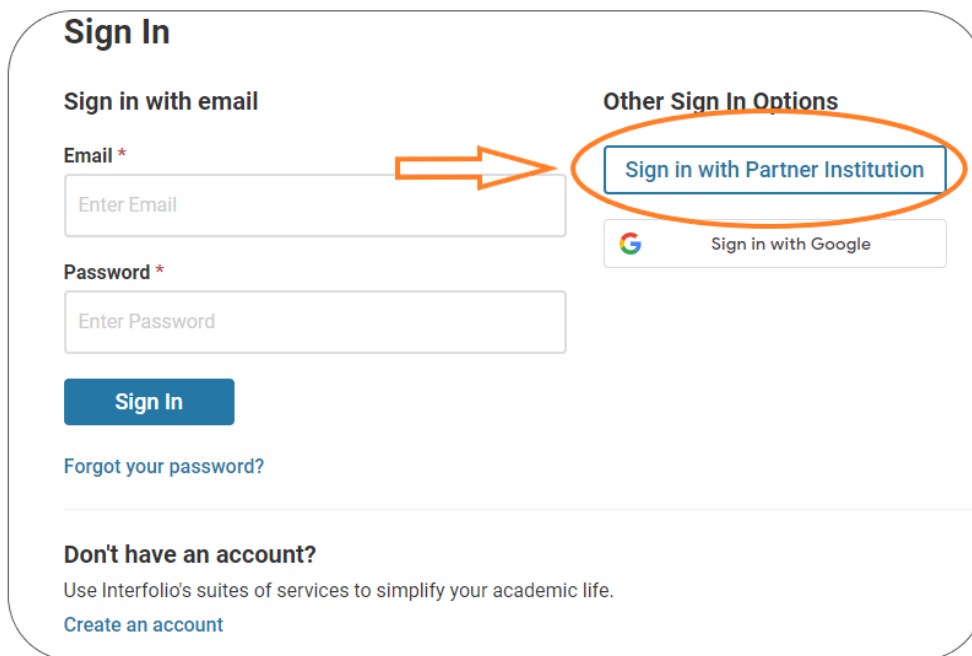- How to view and respond to files that are shared with you by the committee

What does the notification email look like?
1. You will be notified that your case is ready via email by noreply@interfolio.com.
2. Select "View Case" in the notification email.

COLORADO STATE UNIVERSITY

Colorado State University

Colorado State University-Fort Collins has initiated a review on your behalf.

VIEW CASE

This case link will be valid for 30 days.

Viewing your case will allow you to view requirements, read instructions, and submit your packet online.

Powered by Interfolio | Support

How do I access my candidate account?

1. The link from the notification email will take you to the Interfolio sign-in screen. You may also login at interfolio.com.

Sign In

Sign in with email

Email *

Enter Email

Password *

Enter Password

Sign In

Forgot your password?

Other Sign In Options

Sign in with Partner Institution

G   Sign in with Google

Don't have an account?

Use Interfolio's suites of services to simplify your academic life.

Create an account

2. Select "Partner Institution" as shown above, and search for Colorado State University-Fort Collins as shown below.

Sign in through your institution

If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.

colorado

Colorado State University-Fort Collins
University of **Colorado** - Denver Dev
University of **Colorado** College of Nursing
University of **Colorado** Denver | Anschutz Medical Campus
University of **Colorado** School of Dental Medicine
University of **Colorado**-Denver

3. Select Colorado State University-Fort Collins from the drop-down list.
4. You will be taken to "NetID Login" to enter your CSU NetID and Password and then you will be immediately directed back to Interfolio.

Viewing your packet instructions and requirements

1. You will have both an institutional account and a personal Dossier account. Select your CSU institutional account when prompted, or from the drop-down menu in the upper right corner.
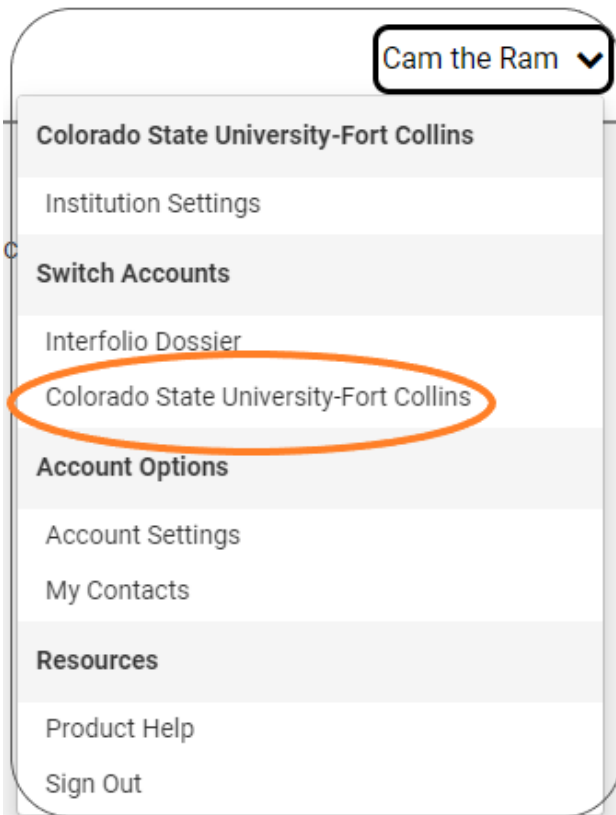
2. Click the link to "Your Packets" from the left-hand navigation bar or use the link in your homepage action items.
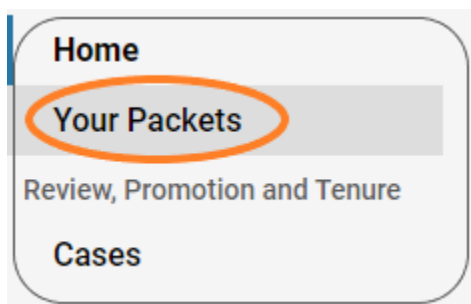
Not seeing it?

If you do not see this in your navigation bar, you might be on the Dossier page, switch accounts using the account menu at the top right of the page.

3. Select the packet you want to work on.

4. You will see an "Overview" page listing the required materials and/or forms you will need to add to your packet.

5. Click "View Instructions" to read instructions for assembling and submitting your packet.

6. Your "Candidate Documents" section contains a list of materials you will need to upload before the submission deadline. Documents listed as '0 required' are optional.

How to add and edit files to satisfy packet requirements

1. Click the "Edit" button.

2. Click "Add" next to the requirement.

3. You can add new files including video and webpages.

Naming your files

When uploading files, make sure you give the materials in your packet a meaningful title because reviewers will see the titles you provide as bookmarks to the left of the page when reviewing your documents.

By default, the name that will appear to reviewers is the name of the file as you upload it, but you can also edit the title of a file after adding it to your packet.

4. If you need to edit or replace a document, click the "Edit" action next to the title of the document.

Title	Details	Actions
Faculty Annual Evaluation Example	Added Jan 12, 2023	Edit Remove

5. You can edit the title of the file or select "Replace" to choose a new file to replace it.

Previewing your packet before submitting

The preview shows exactly how the packet you are submitting will appear to your committee.

1. Click "Preview Packet" at the top right of the page.

Colorado State University-Fort Collins > Your Packets >

Faculty Annual Evaluation

View Instructions | Preview Packet

Unit	Type	Packet Deadline Type	Packet Due Date
Colorado State University-Fort Collins	Review	Soft Deadline	Feb 1, 2023

Overview   Packet

☐   ⊕ Expand All   ⊖ Collapse All

2. You can also preview individual documents by clicking the document title.

COLORADO STATE UNIVERSITY

CV and Faculty Activity Report 1+ required, 1 Added

Submit current CV and faculty activity reporting per department requirements.

Title	Details
Faculty Annual Evaluation Example	Added Jan 12, 2023

Submitting your packet

1. After reviewing your packet, click "Submit" in the upper right-hand corner. After submission, the packet will be locked from editing unless overridden by the administrator.

Overview   Packet

☐   ➕ Expand All   ➖ Collapse All
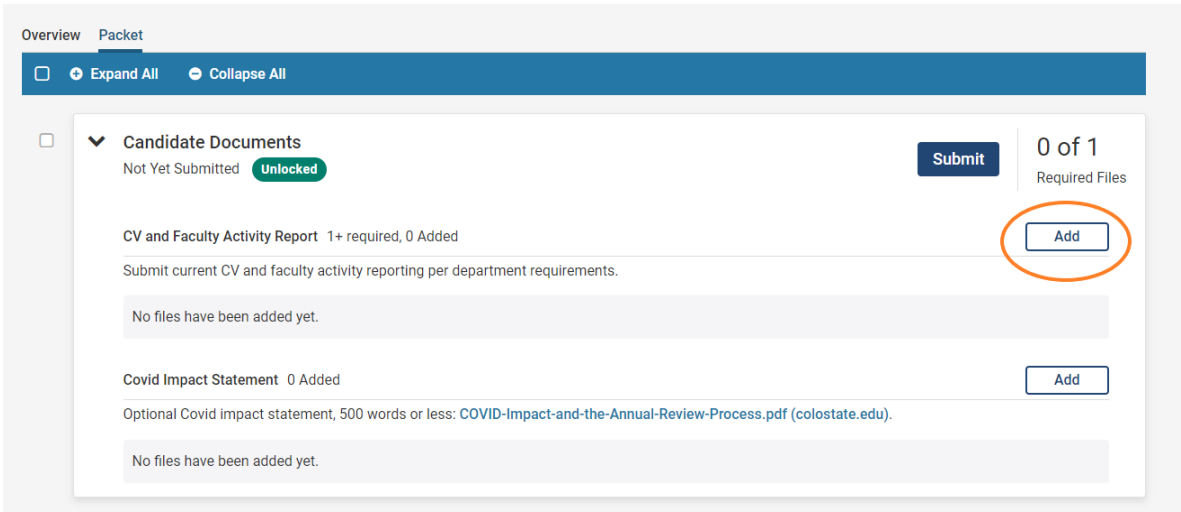
☐   ∨ **Candidate Documents**
Not Yet Submitted   **Unlocked**   [Preview] [Submit]   1 of 1
Required Files

2. If you try to submit a section with too few or too many materials for the given requirements, you will see a message titled "Submission Confirmation" indicating the issue.

Submission Confirmation ✖

The section Candidate Documents cannot be submitted because there are issues with the requirements listed below. You can submit the section once you have corrected any issues and added materials to meet the requirements for the section.

Requirement Name	Issue
CV and Faculty Activity Report	Missing the minimum number required.

Close

3. If you have uploaded all required materials, you will see a confirmation message shown below warning that after you submit, you cannot edit the documents.

Confirm ✖

You cannot edit the documents and forms within a section once it has been submitted. An administrator will need to unlock the section in order for you to make any changes. Are you sure you want to submit the section Candidate Documents at this time?

Yes   **No**

4. After you submit your packet, you will see a green confirmation notice appear in the lower left corner of the browser indicating that the section was successfully submitted. This message disappears after a few seconds. If you would like to see if a section has been submitted, click on "Packet", and notice that under the section name, "Submitted" appears. I will also appear in the "Overview" tab, underneath "Candidate Documents".

Viewing and responding to shared files

The departmental committee or the department head reviewing your case will share a written evaluation for you to review. You will receive an email notification when a file has been shared with you. If you wish to respond to the written evaluation with a supplementary statement, the statement must be sent within 10 working days of receiving the document. You can upload you're file in response to the document shared with you. The document will then be included as a part of the packet for the following reviewers.