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

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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.
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.

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Details</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Annual Evaluation Example</td>
<td>Added Jan 12, 2023</td>
<td>Edit Remove</td>
</tr>
</tbody>
</table>

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

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.

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

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.
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.

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 your 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.