Committee Member Guide to Interfolio Review, Promotion, and Tenure

This document explains what a departmental review committee can expect during the review, promotion, and tenure process when they use the Interfolio module.

- Additional information and product help can be found here: https://product-help.interfolio.com/en_US/review-promotion-tenure
- Committee managers and committee members are encouraged to complete Interfolio's E-Learning course here: https://product-help.interfolio.com/en_US/product-training#accordion307350

In this document:
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- How do I access my Interfolio account?
- Viewing your case list
- Navigating the case page
- Read and evaluate case materials
- Uploading letters and/or committee notes
- Sending letters/documents to candidates
- Sending the packet forward to the next step in the review process

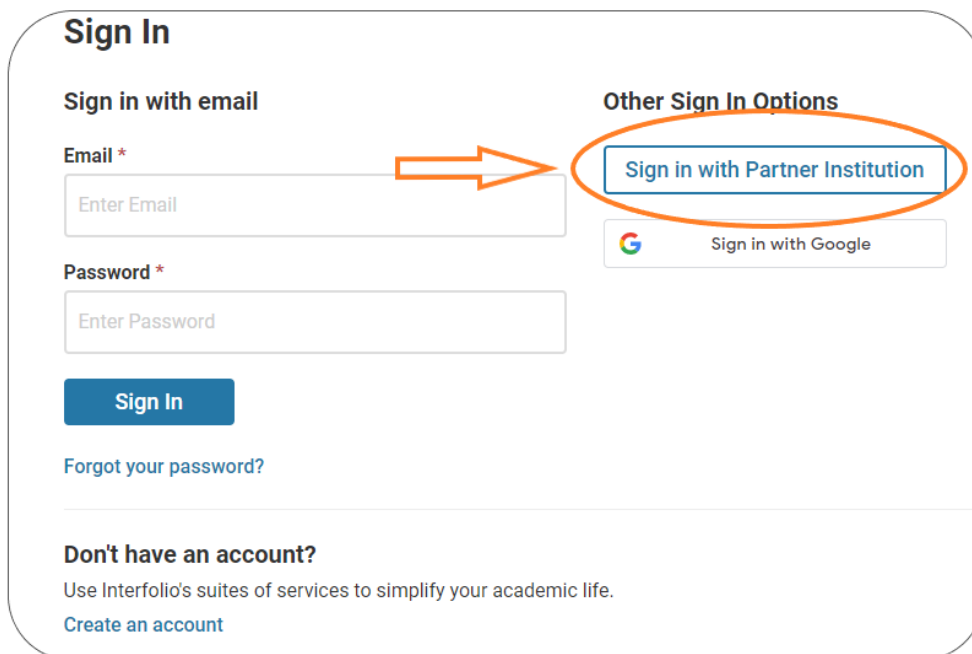## What does the notification email look like?
1. You will be notified that a case is ready for your review via email by noreply@interfolio.com.

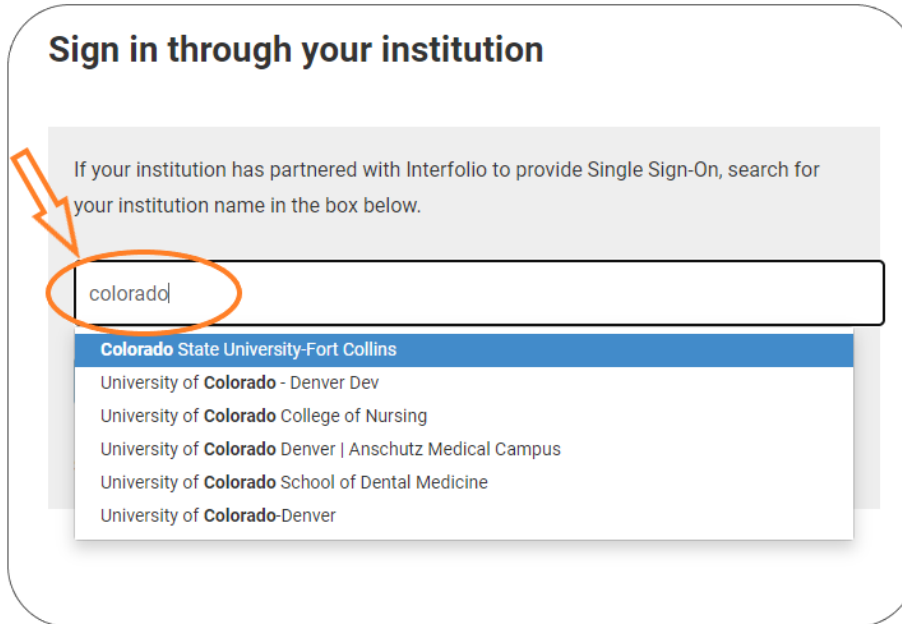2. Select "Review Candidate" in the notification email.
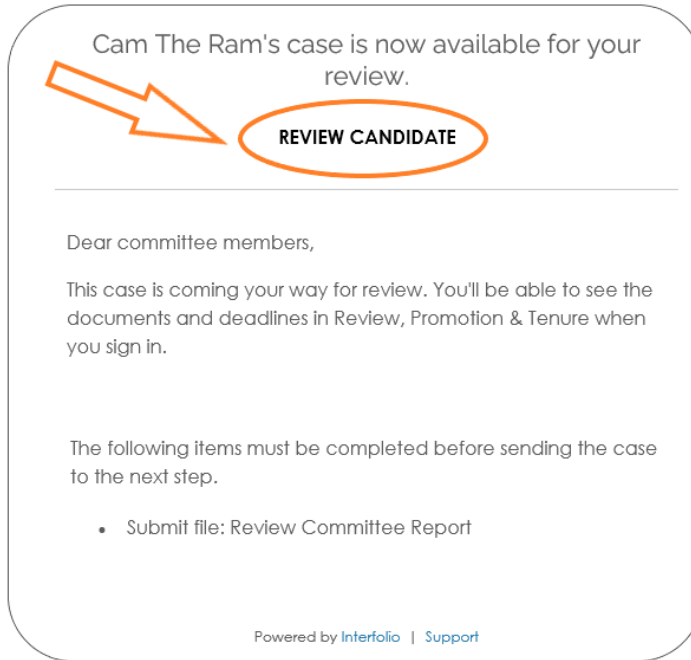
How do I access my Interfolio account?

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.
5. You will have both an institutional account and a personal Dossier account. Select your Colorado State University-Fort Collins institutional account when prompted.

Viewing your case list

You will find the list of cases you are evaluating or managing on the "Case List" page. You see all the cases to which you currently have access on the "Case List". When a case is moved to a committee you are not on, or workflow step from which you have been recused, the case will no longer appear in your list. Likewise, when a case moves to a committee or step you have access to, the case will become visible.
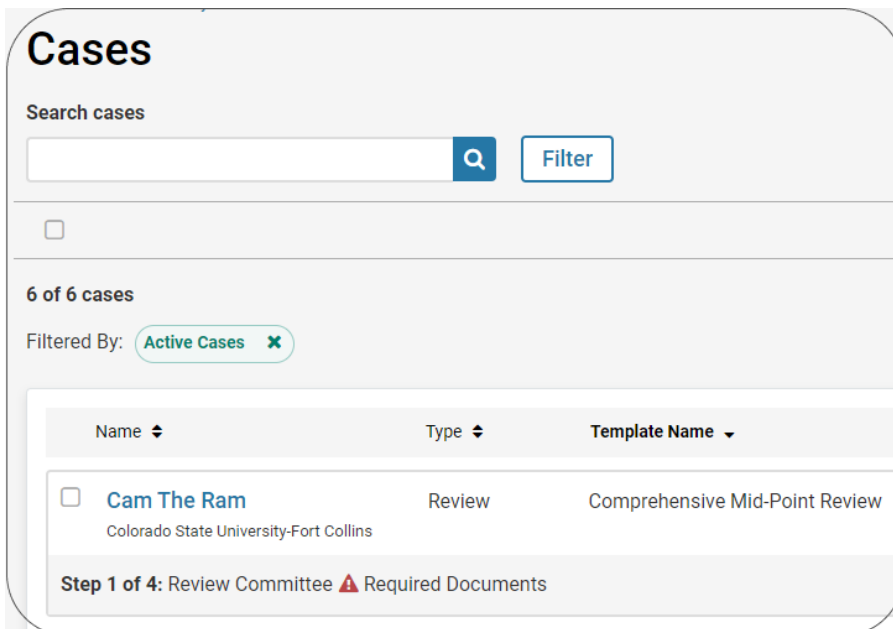
Access your list of cases

1. Select "Cases" from the left-hand navigation menu to view a list of all the cases to which you have access.

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Home

Your Packets

Review, Promotion and Tenure
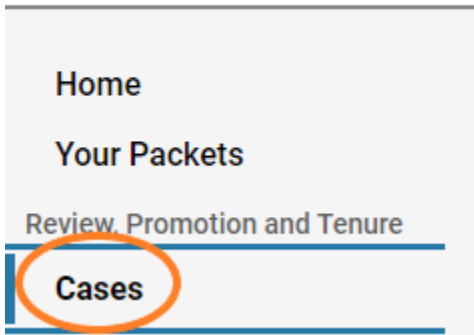
Cases

TIP: You can also look for the name of the case you want to view in your list of Action Items. Clicking the name of the case here will take you directly to the case for that candidate.

2. This will open the case list where the cases you can access will appear listed in a table. The step at which you will be reviewing the case will appear below the candidate's name. The candidate will not be able to see the steps.

Cases

Search cases

[   ] 🔍 [Filter]

☐

6 of 6 cases

Filtered By: (Active Cases ✕)

Name ⬍	Type ⬍	Template Name ⬇
☐ **Cam The Ram** Colorado State University-Fort Collins	Review	Comprehensive Mid-Point Review

Step 1 of 4: Review Committee ⚠ Required Documents

3. To access cases in the list, click on the name of the case you want to view.

Navigating the case page

The case page is the central workspace for Committee Members in RPT. Most importantly, this is where you can access the candidate materials, forms, and communication tools necessary to evaluate a candidate's case.

Clicking on the name of the candidate will direct you to the case page, shown below, where you can access materials and forms available to committee members, and view materials submitted by a candidate. The case page is a tabbed interface, the "Case Materials" tab, and the "Case Details" tab.
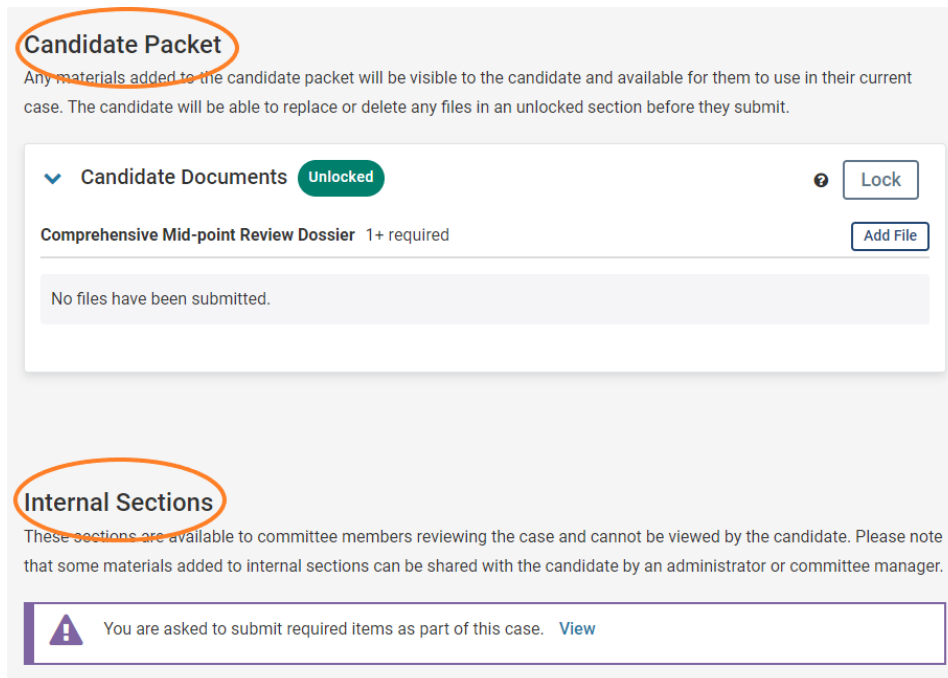
Case Materials

The "Case Materials" tab is divided into two main parts that can each contain one or more sections – the candidate packet, and internal (case) sections.

1. The **Candidate Packet** is made up of documents uploaded by the candidate. Materials in the candidate packet will be visible to the candidate.

2. **Internal Sections** contain materials accessible by committee members but not viewable by the candidate. Please note that materials added to internal sections can be share with the candidate by an administrator or committee manager.

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

⌄ **Candidate Documents** Unlocked   ❷ [Lock]

Comprehensive Mid-point Review Dossier 1+ required   [Add File]

No files have been submitted.

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

⚠ You are asked to submit required items as part of this case. View

Case Details

The "Case Details" tab is where you can view the other members of your committee and the instructions for your committee.

Read and evaluate case materials

On the "Case Materials" tab of the case page, you can read documents that are part of the case.
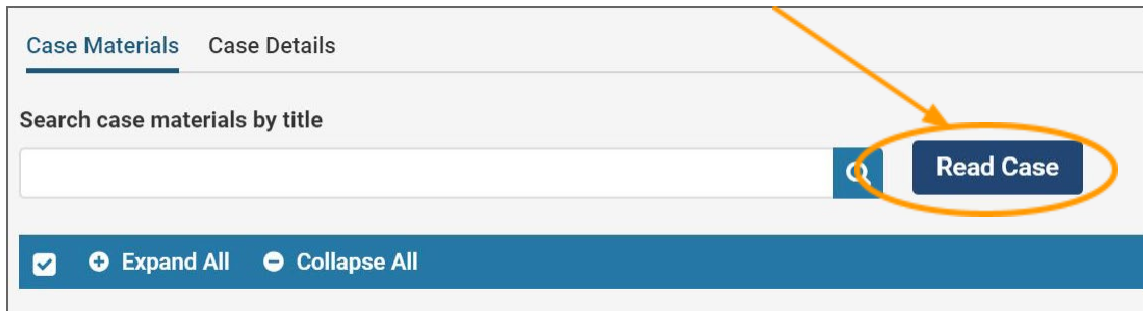

Search for case materials by title

You can search for particular case materials by title. This acts as a filter, displaying only materials with a matching title.
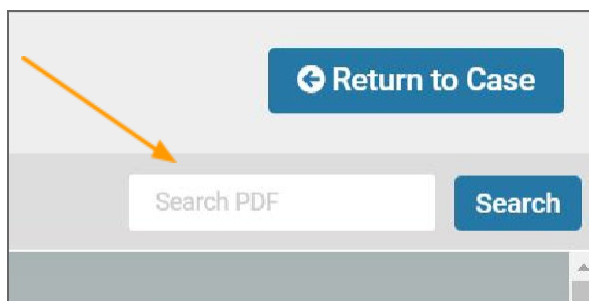

Read Case

1. Click "Read Case" to load all accessible case materials into the document viewer where they can be viewed online.

2. The document viewer displays all materials organized by sections.
3. If text data is stored in the file, you may be able to search it with the "Search PDF" tool in the upper right-hand corner of the document viewer.
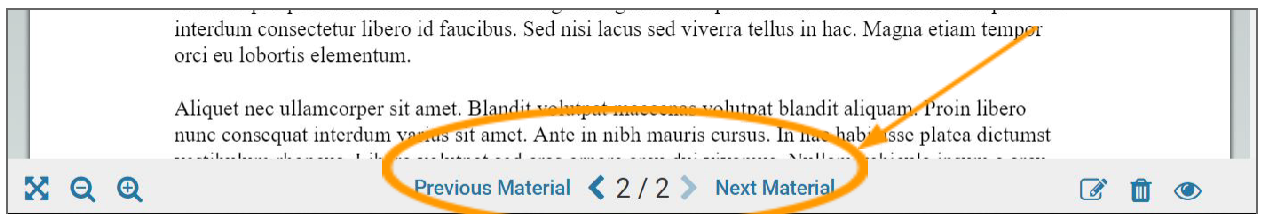

4. Packet sections are bookmarked in the column to the left.
5. Annotations appear on their own tab in the viewer.
6. The icon below toggles the header bar of the viewer on or off.
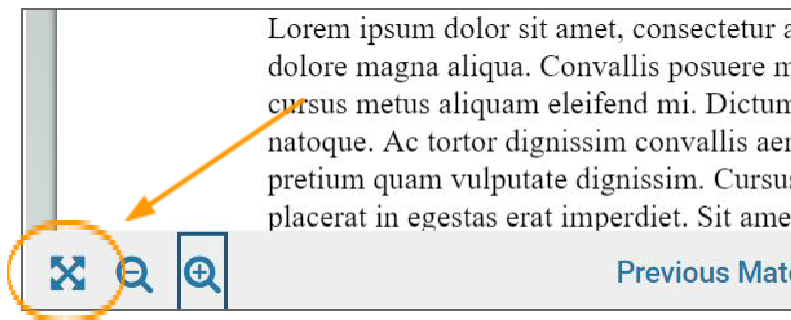
7. The zoom icons zoom in or out of the displayed document.
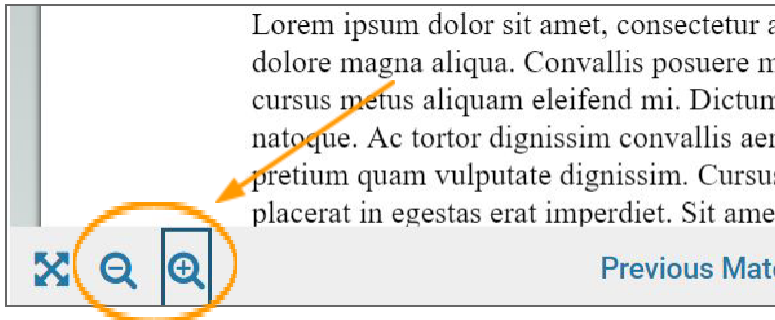
8. Click the arrows to move back and forth between pages and materials in the viewer.

Committee Chairs Only: Uploading letters and/or committee notes

After the committee has reviewed the case and come to a decision, the chair of each committee will need to upload their required documents into the case.

1. To begin, navigate to the "Case Materials" section of the candidate's page.
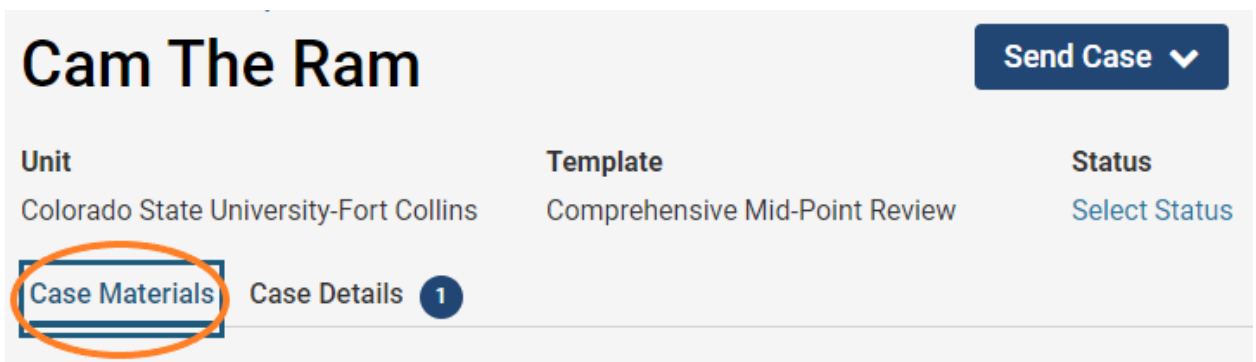
2. Scroll down to "Internal Sections".

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Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

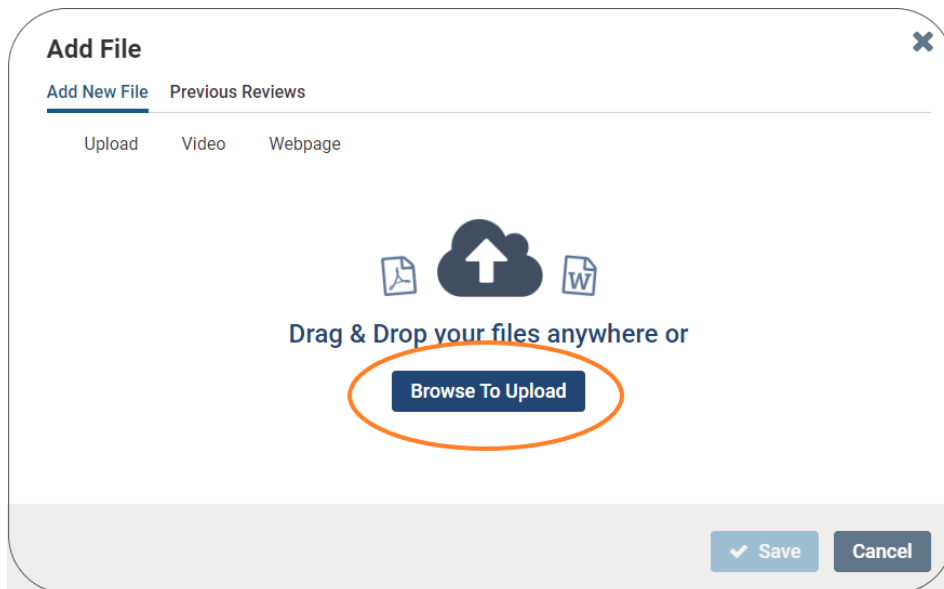⚠ You are asked to submit required items as part of this case. View

3. Click the "Add File" button that corresponds to your section.

> **Department Head Written Evaluation**   Edit | Add File

4. Click "Browse To Upload" and select the document you would like to upload and press "Save".

Add File   ✖

Add New File   Previous Reviews

Upload   Video   Webpage

Drag & Drop your files anywhere or

Browse To Upload

✔ Save   Cancel

5. After the file has been uploaded, select "Edit" under the "Actions" header.

6. Select "Edit Settings".

7. You will now have the ability to edit the document's name, section, and access.
8. Committee Chairs can the change the "Access" to "Administrators & Committee Managers".

Sending letters/documents to candidates

To share the evaluation/letter with the candidate, follow the steps below after you have uploaded your document.

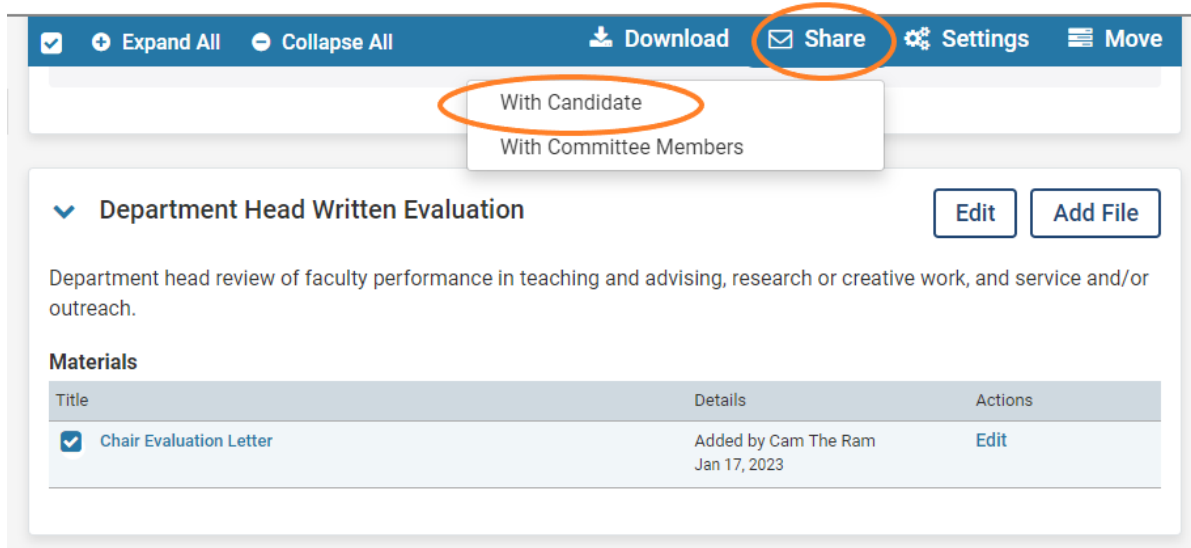1. On the "Case Materials" tab, select the document you uploaded.

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Department Head Written Evaluation

Department head review of faculty performance in teachir outreach.

Materials

Title
☑ Chair Evaluation Letter

2. Click "Share" and select "With Candidate".

☑ ⊕ Expand All ⊖ Collapse All   ⬇ Download   ✉ Share   ⚙ Settings   ☰ Move

With Candidate
With Committee Members

Department Head Written Evaluation   Edit   Add File

Department head review of faculty performance in teaching and advising, research or creative work, and service and/or outreach.

Materials

Title	Details	Actions
☑ Chair Evaluation Letter	Added by Cam The Ram Jan 17, 2023	Edit

3. Compose your message to the candidate (recommended language below).

Message to Candidate

To

Cam The Ram

Subject *

Department head evaluation for your review

Message *

Dear [Name],

My evaluation letter for your [review/reappointment/tenure/promotio
You can access the letter by clicking 'View Files' above and logging

Recommended Language

Subject: Department head evaluation for your review

Body: Dear [Name],

My evaluation letter for your [review/reappointment/tenure/promotion] packet is now available for your review. You can access the letter by clicking 'View Files' above and logging into your Interfolio account.
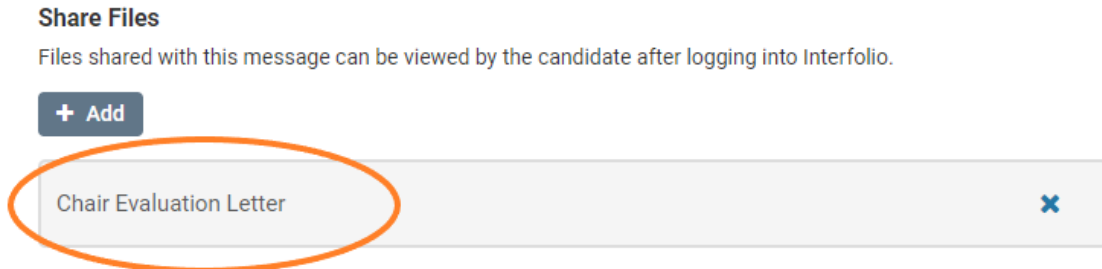
Per the Academic Faculty & Administrative Professional Manual Section E14: for each performance review, a written report shall be prepared by the academic supervisor, and this report shall identify strengths and any deficiencies in the faculty member's performance. The faculty member shall be given a copy of this report, and they shall then have **ten (10) working days** to prepare a written response to this report if the faculty member desires to do so. The report and any written response on the part of the faculty member shall be forwarded to the dean and the provost, and a copy shall be maintained in the faculty member's official Personnel File.

Please review the evaluation letter shared with you here. If you would like to submit a statement, I have enabled the option for you to submit a file in response.
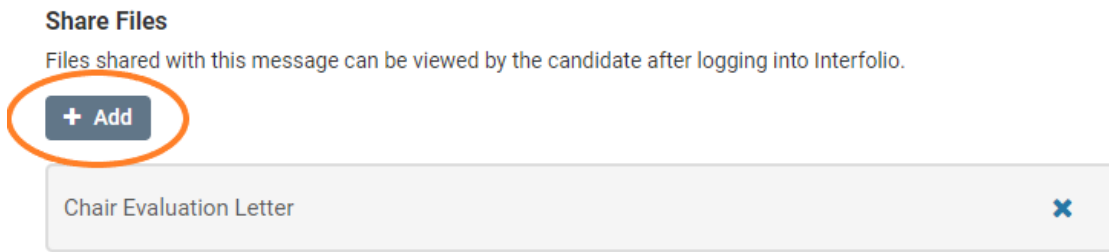
Sincerely,

Your Department Chair

4. Double-check that your shared files are listed at the bottom left of the window.

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

Chair Evaluation Letter ✖

5. Click "Add" to add more files, or the "x" to remove shared files.

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

Chair Evaluation Letter ✖

6. Select "Enable" under "File Response". This allows the faculty member to upload a response to the evaluation letter if they wish to. Once you select "Enable" you can then set a deadline for the response and select "Faculty Member Comments" as the "Section for Response".

File Response:

☑ Enable

When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.
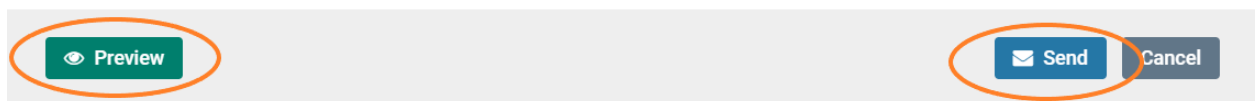
Message Reason

e.g. rebuttal, reminder

Deadline ❓

Feb 1, 2023   📅   ❓

Section for Response *

Faculty Member Comments   ⌄

7. You can preview your message and 'Send' when ready.


👁 Preview   ✉ Send   Cancel

8. When sharing case materials with the candidate, the candidate will get a notification that materials have been shared with them. They must log in to their account to view the shared file.

Sending the packet forward to the next step in the review process

When the committee has finished their review and all required documents have been uploaded to the case, you can move the case forward in the review process using the following steps.

1. First, locate the "Send Case" button in the top right corner of the page.

15
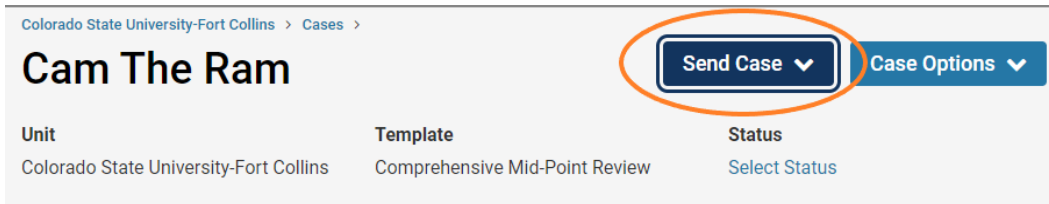
2. Committee Chairs will select "Forward to" the next step of review.
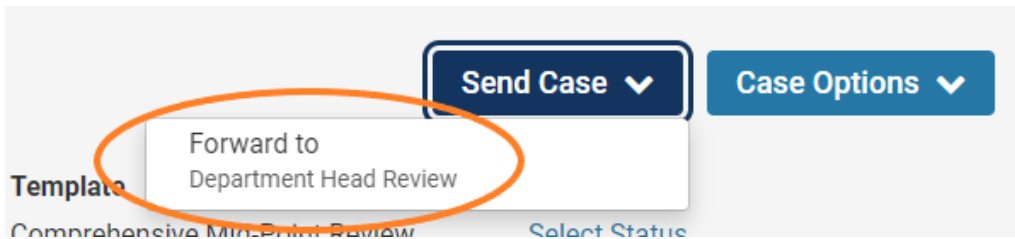
3. The window pictured below will appear. This screen allows you to view who will lose and who will gain access to the case after you send it forward. It will also allow you to optionally send a personal message to the reviewers gaining access.

Send Case Forward ✕

Great job! You're sending the case forward to the next step, Provost's Office. The following reviewers will lose access to the case:

Dean | 1 members

The following reviewers will gain access to the case:

Provost's Office | 0 members

☑ Send a message to the reviewers gaining access.

If recipients respond to this message, their response will come directly to your email inbox.

Subject *

Annual evaluation ready for your review

Message *

Dear committee members,

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,
Cam The Ram

👁 Preview   Continue   Cancel

4. When you are prepared, click "Continue".
5. The case will now be forwarded to the next step in the process and should disappear from your case list.