

Staff Guide to Interfolio - Range Elevation 2023/2024

Eligibility Notification

- Faculty Advancement and Student Success (FASS) will notify and create cases for eligible temporary faculty. Deans, chairs/directors, college staff and administrative coordinators will be copied on the notification. Eligibility lists will also be available to college staff via SharePoint for their reference during this process.

Log-in

- Go to www.interfolio.com > Sign In > Partner Institution > select "San Diego State University" from the dropdown menu and you will be directed to Single Sign On. Log in with your SDSUId username and password.
- Problems with logging in?
 - 1) Make sure you are using Google Chrome.
 - 2) Double-check with college or department/school office to make sure the correct email address was used and spelled correctly.

Case Preparation

- Obtain electronic signatures for reviewing bodies for evaluation letters
 - DEPARTMENT LEVEL: Department/School Peer Review Committee Chair **and** Department Chair/School Director
 - COLLEGE LEVEL: Dean
- *Department Coordinators should be responsible for adding peer review committee members (tenured faculty) to Interfolio for respective units (e.g., "AMIND – Lecturer Peer Review Committee"). Please also verify/update Department Chairs/School Directors as well.*
 - From your side-bar menu, under "Review, Tenure, and Promotion", select "Users and Groups."
 - Select the "Committees" tab.
 - In the "Search by committee name" bar, type the unit name of the member you'd like to update, select the pencil to the right of the committee name to edit
 - Remove existing committee members that are no longer serving on committees by selecting the "X" by their name.
 - In the "Search Users" bar, type the first name of the member you would like to add to this committee, when the name appears, select "+Add" to the right of the name.
 - After you have added all of the names, click "Update."
 - Do not select the star next to these names unless you want to assign someone as a committee manager; committee chairs do not need this designation.
- Deans will be globally updated by FASS.
- Cases will be created for eligible faculty by FASS.

Department-Level Review

- After the candidate submits their case, the case will be moved to the department-level. The department/school administrative coordinator will be notified by email via Interfolio.
 - After the committee completes their review, the department/school coordinator should go into each candidate's case in Interfolio and do the following:
 - Upload the department/school committee's recommendation letter in the "Committee Documents" section within the candidate's case. See the "**Recommendation Letters**" section below.
 - Update "Status" to "Pending DEPT CHAIR Review."
 - Click "Send Case" at the top of the page to move the case forward to the department chair/school director.
 - After the department chair/school director completes their review, the department/school coordinator should go into each candidate's case in Interfolio and do the following:
 - Upload the department chair/school director's recommendation letter in the "Committee Documents" section within the candidate's case. See the "**Recommendation Letters**" section below.
 - Update "Status" to "Pending DEAN Review"
 - Click "Send Case" at the top of the page to move the case forward to the college-level review.
- ***Note: Department level recommendation letters are not shared with the candidate. Only Dean's recommendation letter is shared.*

College-Level Review

- Once the department-level reviews are complete, the case will be moved to the college-level. The college range elevation representative will be notified by email via Interfolio.
- After the dean completes their review, the college range elevation representative should go into each candidate's case in Interfolio and do the following:
 - Upload the dean's recommendation letter in the "Committee Documents" section within the candidate's case. See the "**Recommendation Letters**" section below.
 - Update "Status" to "Pending Faculty Advancement Review."
 - Click "Send Case" at the top of the page to move the case forward to FASS.
 - Share letter with candidate and previous levels of review. See "**Recommendation Letters**" section below.

Recommendation Letters

- Review letters prior to uploading and sending to the candidate. We suggest that completed letters of evaluation be reviewed for the following:
 - 1) Verify letter date - which should be the date in which the letter will be shared (per [Range Elevation Timeline](#)).
 - 2) Verify "From" includes name, title *and* signature of reviewer.
 - 3) Verify proper salutation and correct spelling of candidate name.
 - 4) Verify proper letter format (per appropriate [Sample RE Letter for Temporary Faculty](#))
- Once your review is complete:
 - Save the letter using the following naming convention: Reviewer, Description - Candidate Last Name, First Initial (e.g., *Department Chair Recommendation Letter – Smith, J*)
 - Open the case, go to the "Committee Documents" section of the case in Interfolio.
 - Select "Add File", on the next pop-up screen select, "Add New File"; drag and drop or upload the saved letter, then click "Save". The document should appear in the chosen section.
- **Share with Candidate.**
****Note: Only the Dean's letter is shared with the candidate.*
- On the Case Materials tab, select the uploaded dean's recommendation to be sent to the candidate using the checkbox to the left of the document. An action bar will appear:
 - Select "Share" on the action bar.
 - Select "With Candidate."
 - Another window will open called Message to Candidate. The candidate's name and email will auto-populate.
 - [See Sample #1](#) for details on formatting the message.
 - Confirm that the document you selected to share will be listed under Share Files.
 - Click "Send" at the bottom right of the screen.
- **Share with Committee Members.** On the Case Materials tab, select the uploaded letter of evaluation to be sent to the copy notations using the checkbox to the left of the document. An action bar will appear:
 - Select "Share" on the action bar.
 - Select "With Committee Members."
 - Another window will open called Message to Committee. Remove any committee members who auto-populate that you do not wish to receive this message.
 - From "Add Another," select "Committee"
 - Select the previous reviewers, department coordinator, and/or college RTP rep from the drop-down list. [See Sample #2](#) for details on formatting the message.
 - The document you selected to share will be listed under Share Files and attached to the message when sent.
 - Click "Send" at the bottom right of the screen.
- In the event a corrected or revised copy is needed, upload PDF copy of the updated evaluation to the appropriate section of the case in Interfolio: "Committee Documents". Use the following naming convention: COPY TYPE Evaluator, Description - Candidate Last Name, First Initial (e.g., *CORRECTED Dean's Evaluation Letter – Smith, J*). If it is a corrected copy, delete the old version; if it is a revised copy, leave the original.

Closing or Deleting Cases

- If a candidate resigns, retires, requests a withdrawal from the process, or a case has been created in error, FASS will delete the case.
- Departments/schools are responsible for printing and filing range elevation award letters in the official personnel action file.

SAMPLE LANGUAGE FOR NOTIFICATIONS

#1 Evaluation Letter to Faculty Member

TO: Faculty Member
 FROM: College RTP Representative
 SUBJECT: Range Elevation Recommendation Letter from Dean – LAST NAME of CANDIDATE, FIRST INITIAL

Dear Candidate,

To view your Dean’s recommendation for range elevation, please select the “View Files” link in this email which will prompt you to log in to Interfolio. On your dashboard, under “Your Action Items” click on your name to view the packet; OR, click “Your Packets” in the left hand navigation menu and select the case, open the “Shared Committee Files” tab of the case packet and files shared with you will appear listed.

#2 Evaluation Letter Copy Notations to Reviewers

TO: Previous Reviewing Bodies
 FROM: College RTP Representative
 SUBJECT: Range Elevation Recommendation Letter from Dean – LAST NAME of CANDIDATE, FIRST INITIAL

Dear Reviewer,

Please log-in to Interfolio to view a copy of the Dean’s recommendation for the above-named faculty member.

CASE REVIEW STEPS

1. Staff
 - a. Department/School Coordinator
2. Department Level Review
 - a. Department/School Peer Review Committee
 - b. Department Chair/School Director
3. Staff
 - a. College Range Elevation Representative
4. Dean
5. Faculty Advancement
6. Staff
 - a. Department Coordinator