



SAN DIEGO STATE
UNIVERSITY

Department Coordinator Guide to Interfolio RTP

1. Log-in

- You no longer need an Interfolio account to access cases. 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 as the username, and password associated with your SDSUId.
- Problems with logging in?
 - 1) Make sure you are using Google Chrome.
 - 2) Double-check with department to make sure the correct email address was used.
 - 3) Double-check with department to make sure the correct email address was spelled correctly.
 - 4) Check your email Spam for email.

2. Interfolio Preparation:

- Obtain electronic signatures for reviewing bodies for recommendation letters
DEPARTMENT LEVEL: Department/School Peer Review Committee Chair **and** Department Chair/School Director
- Ask College RTP Reps if department/school coordinators will be responsible for adding committees to Interfolio. If so, add peer review committee members to Interfolio for respective units; deans and department chairs/school directors will be updated by Faculty Advancement.
 - From your dashboard, under Review, Tenure, and Promotion module, select the drop-down next to "Manage," and select "Users and Groups"
 - Select the "Committees" tab
 - In the "Search Committees" 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 selected the "X" by their name.
 - In the "Search Users" bar, type the first name of the member you'd like to add to this committee, when the name appears, select "+Add" to the right of the name
 - After you've 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; so leave it off

3. Case Creation:

- On your dashboard, select "View Cases" on the Interfolio Promotion & Tenure card.
- Create a case for each faculty member undergoing performance review using the designated templates in Interfolio P&T.
- Select "Create Case." Another window will appear to select the organizational unit for the new case. Use the drop-down menu to select the appropriate department from the list of colleges at the university. Select "Confirm."
- On the next screen, select the template which reflects the request that the candidate is making for performance review (i.e., "ENS – Reappointment, Tenure, and Promotion"). **Only use templates with the departmental unit abbreviation as the prefix.**
- Use the drop-down menu to select the "Type" of case you are creating.
Use "Reappointment" for all reappointments.
Use "Promotion" for promotion and/or tenure.
Use "Tenure" for tenure only.
- Enter candidate's name and email address.
- Will the Candidate Submit a Packet? Select "Yes."
- Do not add "Case Data Forms," click "Continue"
- Enter WPAF/"Packet" submission date in the "Candidate's Packet Due" field.
- Do not change "Instructions to Candidate."
- Do not change "Packet Requirements," click "Continue."
- Do not change "Internal Case Sections," click "Continue."
- Do not change "Case Review Steps," click "Continue."
- Review "Case Summary" page, make changes if necessary, and select "Return to Case."

- Select “Notify Candidate” to inform faculty candidate that their case is ready for documents to be uploaded. (Use automated email message or see **Sample #1**.)

4. Bulk Case Creation:

This feature allows you to create multiple cases at once. To use this feature, all cases must be in the same unit and require the same template.

- On your dashboard, select “View Cases” on the Interfolio Promotion & Tenure card.
- Create a case for each faculty member undergoing performance review using the designated templates in Interfolio P&T.
- Under “Create Case.” Use the drop-down menu to select “Create Multiple Cases”
- On the Case Setup Screen, follow the prompts
- In which unit would you like to create your cases? Search for or select a unit
- What type of cases are you creating? Select “Other” for Reappointment, Tenure, and Promotion, and click Continue
- Will the Candidate Submit a Packet? Select “Yes.”
- Add 1 or more candidates, click the “+ Add Candidates” button
- In the "Search Users" bar, type the first name of the member you'd like to add to this committee, when the name appears, select "+Add" to the right of the name
- After you've added all of the names, click "Done"
- Do not make any changes on the Summary & Confirmation Page, scroll to the bottom
- Would you like to notify candidates now, select “Yes”; a message box will auto-populate; see **Sample #1** for details on formatting the message. Click “Send” when completed.

Once a candidate has submitted their packet it will automatically lock. Only department coordinators and the College RTP Representative can provide access to make changes to a submitted packet. If a faculty candidate has submitted their “Packet” and needs to change or edit materials, they will need your assistance in accessing the section for editing. To provide access, go to the candidate’s case, identify the section that needs to be unlocked, click and switch “Candidate Editing” lock to “Enabled.” Inform candidate when the section has been unlocked. The packet will automatically lock after candidate resubmits.

5. For Department-Level Validation:

- After the candidate submits their case, you (along with the department/school committee and chair/director) will be notified via email by Interfolio to be the 1st case review step.
- Direct the department committee or department chair/school director to the Validation Checklist (found on the FA website).
- The validator must sign the Validation Checklist and upload into Interfolio in the “Department/School Review” section of the case, named as “Validation Checklist”.
- After this is done, change the status, and click “Send Forward” at the top of the page to move the case forward. (Use automated email message.)

6. Moving Cases Forward/Backward in Bulk:

- On the Case List page, select the box next to the cases you would like to move (forward or backward). An action bar will appear; on the action bar, select “Send Forward” or “Send Backward.”
- Another screen will open listing the cases that will be moved and to what case review step they will be moved to. The system will automatically select the box for sending a message to the candidate. Unselect the checkbox if you choose not to send a message. If you choose to send a message, you must include a subject and may use the message provided or see **Sample #1** template notifications in this guide for other language. Click “Send” when you are ready to move the cases.

7. For Department-Level Evaluation:

- Review completed letters of recommendation from department/school committee and chair/director.
- **College RTP Rep will also need to review letters (via email/outside of Interfolio) from the department peer review committee and department chair/school director prior to department coordinator uploading and sending them to the candidate.**
- Upload PDF copy of the recommendation letter in the “Department/School Review” section of the case in Interfolio with the name “Letter of Recommendation - _____” (or e.g., “Department Peer Review Committee Recommendation”), and one of the following descriptions: “Department Peer Review Committee,” “School Peer Review Committee,” “Department Chair,” or “School Director.”
- On the Case Materials tab, select the uploaded letter of 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 #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.

- To initiate the response/rebuttal feature, select “Enable” under File Response on the Details pane on the right side of your window.
 - Once selected, more fields will appear. Type “Response/Rebuttal” under Message Reason.
 - Type the response/rebuttal deadline date under Deadline (10 days after the date in which you are sending the evaluation to the candidate). Note: this is a hard deadline; candidates will not be able to submit a response after the deadline set.
 - Use the dropdown menu under Section for Response to select the section in which the response/rebuttal statement will be saved. Select the “Department/School Review” section.
 - Click “Send” at the bottom right of the screen.
- On the Case Materials tab, select the uploaded letter of recommendation 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 that auto-populate and you do not wish to receive this message.
 - From “Add Another,” select “Committee”
 - Select the previous reviewers from the drop-down list.
 - See **Sample #3** 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 recommendation letter to the “Department/School Review” section of the case in Interfolio with the name “Corrected Letter of Recommendation - _____” or “Revised Letter of Recommendation - _____” and one of the following descriptions: “Department Peer Review Committee,” “School Peer Review Committee,” “Department Chair,” or “School Director.” If it is a corrected copy, delete the old version; if it is a revised copy, leave the original.
- Change the “status” of the case at each review step using the drop-down menu at the top of the case materials screen.
- Move case forward to next reviewing body by timeline deadline by clicking “Send Forward” at the top of the page for each case review step. (Use automated email message.)

8. Response/Rebuttal:

- On the day after the response/rebuttal deadline, check each case in Interfolio to view responses or rebuttals that may have been uploaded.
- If a faculty candidate submits a response/rebuttal, notify reviewing committee or chair/director by selecting the checkbox to the left of the document/evaluation and send within the platform. An action bar will appear:
 - Select “Share” on the action bar.
 - Select “With Committee Members.”
 - Another window will open called Message to Committee. The current case review step committee/reviewing body will auto-populate.
 - See **Sample #4** 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.
 - **Note: before sending, ensure that there are no attachments to the response/rebuttal letter from the candidate. Any additional material must be submitted through the late-add process.**
- After committee or chair/director review of response/rebuttal, assist reviewing body with completion of Sample Response to Response/Rebuttal Letter and upload PDF to the “Department/School Review” section with the name “Response/Rebuttal Decision - _____” and one of the following descriptions: “Department Peer Review Committee,” “School Peer Review Committee,” “Department Chair,” or “School Director.”
- Use the instructions in this guide to share the decision with the candidate and previous reviewing bodies. (See **Sample #5 and 6**)

9. Late-Add:

(See Late-Add Instructions on the Faculty Advancement website for more information.)

- In the event a candidate requests to add material to the RTP packet after the WPAF closing date, candidates contact the department coordinator or college RTP representative who will create a late-add case in Interfolio. Candidates will receive an email notification that will allow them to upload one late-add item for each late-add case created. Candidates must also complete the Interfolio Late-Add Form when uploading their material.
- After reviewing body reviews late-add, complete the Late-Add Letter, and upload to the “Committee Documents” section of the Late-Add Case.
- Use the instructions in this guide to share the decision with the candidate and previous reviewing bodies. (See **Sample #7 and 8**)

- Once the late-add reaches the custodian of the file, download all late-add materials from the Late-Add Case and upload them to the “Late-Add” section of the *Original Case*. Please note: each Late-Add Letter shall be uploaded to the corresponding documents section by which the letter was derived (i.e., the Late-Add Letter from the Department Chair shall be added to the “Department Review” section).
- After transferring all materials from the late-add case to the original case, close the case, and mark the status as “Complete”.

10. External Evaluations:

(See External Evaluations Instructions on the Faculty Advancement website for more information.)

Due to the length of time it takes to receive external reviews, DO NOT use this feature if you believe the review will be received after the closing date. All external reviews received after the closing date, regardless of college policy requirement, must be routed through the late-add process.

- On your dashboard, select “View Cases, on the Interfolio Promotion & Tenure Card.
- Select a case by clicking the name of the candidate you want to request an external evaluation.
- Click "Request Evaluation"
- Enter basic request information:
 - Name
 - Email
 - Message Subject (“External Evaluation for LAST NAME, FIRST NAME”)
 - Due Date
- Set who can access the request and the evaluation once it is uploaded. Click to open the dropdown list.
- Add Files (CV, Candidate Statement, and 5 professional growth significant items)
- Enter an optional message to be included in the email sent to the evaluator (See **Sample #9**)
- Click "Preview" to see how the request email will appear to the Evaluator
- Click "Send"
- The request will appear in the "External Evaluations" section of the document queue with a status of "Pending" until evaluation is uploaded or request is denied.
- Upload initial memo requesting approval to conduct the external review to the “External Evaluation Material” section.

11. Closing or Deleting Cases:

- If a candidate resigns, retires, requests a withdrawal from the process, or a case has been created in error, delete the case or contact your College RTP Rep if you need assistance.
- If you created a case under the wrong template, the case must be deleted and recreated; contact your College RTP Rep if you need assistance.
- If you have spelled an email address incorrectly, the system will not allow you to correct that field, and the case must be deleted and recreated; contact your College RTP Rep if you need assistance.

A complete, step-by-step Interfolio guide is available [here](#). You may also call Interfolio’s help-line at 877-997-8807.

SAMPLE LANGUAGE FOR NOTIFICATIONS

#1 Sample Language for Bulk Case Creation or Case Creation Email

TO: Candidate
FROM: Department Coordinator
SUBJECT: Interfolio, Review, Promotion & Tenure: Case Available

Dear Candidate,

Please click the link in this email to access your case. When you are prompted to log in, use your SDSUId username and password to do so.

Please visit the Faculty Advancement website (fa.sdsu.edu), under Tenured/Tenure-Track Faculty, Evaluations, Performance Review: Information for Candidates to assist you in this process. Should you need further assistance, first contact your department or school coordinator.

#2 Sample Language for Letter of Recommendation

TO: Candidate
FROM: Department Coordinator
SUBJECT: Letter of Recommendation from _____ (Department Chair/School or Department Peer Review Committee) – LAST NAME of CANDIDATE, FIRST INITIAL

Dear Candidate,

Please log-in to Interfolio, open your case, and select Committee Files to find the performance review letter of recommendation from the _____ (Department Chair/School or Department Peer Review Committee).

You have the right to submit a response or rebuttal statement to this recommendation. Please note: there are to be no attachments to the response/rebuttal statement. If you choose to submit a written response, instructions can be found in the Candidate RTP Guide on the Faculty Advancement website.

#3 Sample Language for Copy Notations to Reviewers

TO: Previous Reviewing Bodies
FROM: Department Coordinator
SUBJECT: CC: Letter of Recommendation from _____ (Department Chair/School or Department Peer Review Committee) – LAST NAME of CANDIDATE, FIRST INITIAL

Dear Reviewer,

Attached you will find a copy of the (Department Chair/School or Department/School Peer Review Committee) recommendation for the above-named candidate.

#4 Sample Language for Response/Rebuttal Notification to Reviewing Body

TO: Reviewing Body
FROM: Department Coordinator
SUBJECT: Response/Rebuttal Notification

Dear _____ (Reviewing Body Receiving Response/Rebuttal),

_____ (Candidate Name) has submitted a Response/Rebuttal to your letter of recommendation. Please log-in to Interfolio, open their case, under “Department/School Review” find and review the response/rebuttal addressed/titled to your reviewing body. After review is complete, prepare a Response to Response/Rebuttal Letter (a sample can be found at fa.sdsu.edu under Tenured/Tenure-Track Faculty, Performance Review: Information for Reviewers), sign, and provide to department coordinator for review and upload.

#5 Sample Language for Response/Rebuttal Decision

TO: Candidate
FROM: Department Coordinator
SUBJECT: Response/Rebuttal Decision from _____ (Department Chair/School or Department Peer Review Committee) –
LAST NAME of CANDIDATE, FIRST INITIAL

Dear Candidate,

Please log-in to Interfolio, open your case, and select Committee Files to find the decision to your response/rebuttal from the _____ (Department Chair/School or Department Peer Review Committee).

#6 Sample Language for Copy Notations to Reviewers for R/R

TO: Previous Reviewing Bodies
FROM: Department Coordinator
SUBJECT: CC: Response Rebuttal Decision from _____ (Department Chair/School or Department Peer Review Committee) –
LAST NAME of CANDIDATE, FIRST INITIAL

Dear Reviewer,

Attached you will find a copy of the (Department Chair/School or Department Peer Review Committee) decision for the response/rebuttal submitted by the above-named candidate.

#7 Sample Language for Late-Add Review Decision

TO: Candidate
FROM: Department Coordinator
SUBJECT: Late-Add Review Decision from _____ (Department Chair/School or Department Peer Review Committee) –
LAST NAME of CANDIDATE, FIRST INITIAL

Dear Candidate,

Please log-in to Interfolio, open your case, and select Committee Files to find the decision to your late-add from the _____ (Department Chair/School or Department Peer Review Committee).

#8 Sample Language for Copy Notations to Reviewers for Late-Add

TO: Previous Reviewing Bodies
FROM: Department Coordinator
SUBJECT: CC: Late-Add Decision from _____ (Department Chair/School or Department Peer Review Committee) –
LAST NAME of CANDIDATE, FIRST INITIAL

Dear Reviewer,

Attached you will find a copy of the (Department Chair/School or Department Peer Review Committee) decision for the late-add submitted by the above-named candidate.

#9 Sample Language for External Review

TO: External Reviewer
FROM: Department Coordinator
SUBJECT: External Evaluation for LAST NAME, FIRST NAME

Dear _____,

Professor FIRST NAME LAST NAME is being considered for _____ (e.g., promotion to the rank of associate professor with tenure). We seek your evaluation of the quality and impact of the candidate's work. Please provide a critical assessment of Professor _____'s research program and impact on your field of study. How would you compare Professor _____ to other researchers in this field at the same stage of career development? On behalf of San Diego State University, I thank you for consideration in this matter. The due date for this evaluation is _____. Please be advised, your evaluation cannot be held in confidence due to policy and contractual obligations of SDSU.

CASE REVIEW STEPS

1. Validation
 - a. Department/School Peer Review Committee
 - b. Department Chair/School Director
 - c. Department/School Coordinator
2. Department/School Peer Review Committee
 - a. Department/School Peer Review Committee (**primary**)
 - b. Department Chair/School Director
3. Department Chair/School Director
4. College Peer Review Committee
 - a. College Peer Review Committee (**primary**)
 - b. Dean
 - c. College RTP Representative
5. Department/School Peer Review Committee & College Committee Meeting
 - a. Department/School Peer Review Committee
 - b. College Peer Review Committee
6. Dean
7. Faculty Advancement
8. UPTRP (if applicable)
9. College Peer Review Committee & UPTRP Meeting
 - a. College Peer Review Committee
 - b. UPTRP
10. UPTRP
11. Provost
12. UPTRP & Provost Meeting
13. Provost/Faculty Advancement