Staff Guide to Interfolio Periodic Evaluations

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?
   - Make sure you are using Google Chrome.
   - Double-check with department to make sure the correct email address was used.
   - Double-check with department to make sure the correct email address was spelled correctly.
   - Check your email Spam for email.

2. Interfolio Preparation:
   - Obtain electronic signatures for reviewing bodies for recommendation letters or digital stamps can be used.
   - Add peer review committee members to Interfolio for respective units (e.g., "AMIND – Lecturer Peer Review Committee" or "ECON – Post-Tenure Review Committee"); 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:
   - After login, select San Diego State University when prompted, not Dossier
   - On your dashboard, select "View Cases" on the Interfolio Promotion & Tenure card.
   - Create a case for each faculty member undergoing periodic evaluation 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 periodic evaluation.
   - Use the drop-down menu to select the "Type" of case you are creating.
     Use "Review" for all periodic evaluations
   - 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. <u>Bulk Case Creation</u>:
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.

4. <u>For Department-Level Check</u>:
- After the candidate submits their case, the department/school coordinator will be notified via email by Interfolio to be the 1st case review step. Review candidate materials for completeness and adherence to departmental policy requirements. After this is done, click "Send Forward" at the top of the page. (Use automated email message.)

5. <u>For Department-Level Evaluation</u>:
- Review completed evaluations from department/school committee and chair/director.
- **College RTP Rep will need to review evaluations (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 evaluation to the "Committee Documents" section of the case in Interfolio with the name "Periodic Evaluation - _____" 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 evaluation 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 with auto-populate.
    - **See Sample #1 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 "Committee Documents" section.
    - Click "Send" at the bottom right of the screen.
- To send forms/letters with reviews/copy notations:
    - Select "Share" on the action bar.
    - Select "With Committee Members."
    - Next to "Add Another:" select "User" or "Committee"
    - Another window will open called Message to Committee. Next to "Add Another:" select "User" or "Committee" A dropdown menu will appear to select the appropriate parties.
    - Type a message indicating the purpose of the communication.
    - 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 "Committee Documents" section of the case in Interfolio with the name "Corrected Periodic Evaluation - _____" or "Revised Periodic Evaluation - _____" 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.)

6. 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 director (dean for Cumulative evaluations) 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 #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.
   - After committee or chair/director reviews response/rebuttal, if there is a change in the evaluation, the reviewing body may submit a second evaluation specifying the details of that change. Either document should be uploaded as a PDF to the "Committee Documents" section with the name "Revised Periodic Evaluation - _____" and one of the following descriptions: "Department Peer Review Committee," "School Peer Review Committee," "Department Chair," or "School Director." There is no response rebuttal to the dean's personnel decision for cumulative evaluations.
   - Use the instructions in this guide to share the decision with the candidate and previous reviewing bodies.

7. 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.

8. A complete, step-by-step Interfolio guide is available here. You may also call Interfolio's help-line at 877-997-8807.

For **Temporary Faculty**, departments/schools are responsible for printing evaluations (not candidate materials) and filing them in the personnel action files in the department/school.

For **Tenured/Tenure-Track**, Faculty Advancement is responsible for printing evaluations (not candidate materials) and filing them in the official personnel action files in the Office of Faculty Advancement.

Case Review Steps
1. Department/School Coordinator
2. Department/School Peer Review Committee
3. Department Chair/School Director
4. Staff
   a. Department/School Coordinator
   b. College RTP Rep
   c. Faculty Advancement

SAMPLE LANGUAGE FOR NOTIFICATIONS

#1 Sample Language for Periodic Evaluation Notification

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

Dear Candidate,

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

You have the right to submit a response or rebuttal statement to this evaluation. If you choose to submit a written response, instructions can be found in the Candidate RTP Guide on the Faculty Advancement website.

#2 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 evaluation. Please log-in to Interfolio, open their case, under "Committee Documents" find and review the response/rebuttal addressed/titled to your reviewing body. If you have any changes to your evaluation, you may revise your evaluation and provide to department coordinator or College RTP Representative for upload.