

Candidate Guide to Interfolio Performance Review

Interfolio allows you to assemble and share documents for review using a digital platform. Your department coordinator or College RTP Representative will be able to assist you with many questions. A complete, step-by-step, downloadable Interfolio “Candidate’s Guide” is available on-line [here](#). You may also call Interfolio’s help-line at 877-997-8807.

1. Assemble the following items.

📁 **Personnel Data Summary**

- PDS Cover Sheet (*see form at Faculty Advancement website*)
- PDS Form (*see form at Faculty Advancement website*)
- Curriculum Vitae (*see sample at Faculty Advancement website*)
- Peer Visitations/Evaluations
- Student Evaluations (quantitative and qualitative data for all courses within the last 6 semesters)
- Major exams/assignments (for all courses within the last 6 semesters)
- Syllabi (for all courses within the last 6 semesters)

📁 **Prior Years’ Performance Review Letters** (periodic evaluation letters are no longer required)

📁 **Department & College Criteria** (*obtain a copy from your department or school administrative coordinator*)

📁 **External Review Material** (if applicable)

📁 **Teaching Effectiveness**

- Significant Items 1-5

📁 **Professional Growth**

- Significant Items 1-5

📁 **Service**

- Significant Items 1-5

2. Collect your materials in one folder on your computer desktop.

- For paper materials, scan the documents into PDF format.
- For documents saved to your computer, the system will automatically convert any format to PDF format upon upload.
- For student evaluations, using Google Chrome, after logging in to WebPortal:
 1. Choose "Faculty Evaluation Result."
 2. Under "Reports" in the left-hand menu, choose "By Section."
 3. Select the "Department," "Period," and "Instrument," choose the "Detail" radio button, and click "Next."
 4. Click the link for the particular section you want.
 5. Click "Print Combined Report." When the Print dialog box pops up, locate the "Destination" section in the menu on the left, and choose "Change." Under "Local Destinations," choose "Save as PDF." Choose "Save" in the upper-left hand corner. Name your file, indicate a save location, and choose "Save."
- If you are the author of a published book, you may upload final galleys or a scan of the book in PDF format. If you would like to also submit a physical copy of the book, notify your College RTP representative. Interfolio instructions for uploading links to digital materials (art, recordings, video, etc.) are available [here](#).

3. Rename your documents so that the file names accurately indicate the contents: i.e. “Evaluations Fall 2016,” “HIST 101 Syllabus Fall 2016.” Also ensure that your documents appear in reverse chronological order.
4. Create a login or log into your Interfolio account. To create an account, look for an email from San Diego State University, and click the “View Case” link in the email and create a password.
5. Upload materials.
 - On your Interfolio dashboard, under “My Packet,” select “View.”
 - Click “Instructions” in the upper right corner of the page to view instructions.
 - Click “Work on Packet” to begin uploading materials.
 - Use the “Add File” button to upload each item into the appropriate section (maximum file size 100 MB.)
 - Click the “Review & Submit” button to preview contents. Ensure materials appear in the proper order.
 - Click “Submit” when you have successfully completed your uploads. After submission, you will not be able to edit the materials unless access is provided by your department coordinator.
6. You will be notified by email when your evaluation letter is complete. Click the link in the email, log in to Interfolio, click on “My Packet,” and select “Committee Files” in the top right corner to view it.
7. To respond or rebut (within 10 days following receipt of an evaluation), log in to Interfolio, click on “My Packet,” select “Committee Files” in the top right corner, then select “Send Response” to upload and submit. Note the “Response Due” date in the top left corner of the materials reader. The system will not allow you to upload a response or rebuttal after 11:59pm EST on that date, or change or preview your response. You will be notified of the response/rebuttal decision by email.
8. To add materials to the packet after the WPAF closing date, email the Office of Faculty Advancement (facultyadvancement@mail.sdsu.edu) to initiate the late-add process within Interfolio; a case will be created for you to upload the late-add form and item. See Late-Add Instructions and Form at the Faculty Advancement website.