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. Notifications
    - When a case has been created for you, you will receive an email with the subject line, "Interfolio Review, Promotion & Tenure: Case Available" from San Diego State University. The case link will expire in 30 days, so be sure to activate your account within that timeframe.

2. 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.

3. Assemble the following items.
    - 📂 **Personnel Data Summary**
      (see PDS Form for full details, on Faculty Advancement, under Tenured/Tenure-Track Faculty, Evaluations, Performance Review, Information for Candidates)
      - Candidate Statement (up to 3 pages)
      - Teaching Effectiveness: Brief Summary of 5 Items
      - Course Taught chart
      - Theses Chaired, Committee Memberships, Special Studies
      - Professional Growth: Brief Summary of 5 Items
      - Service: Brief Summary of 5 items
      - Curriculum Vitae *(see suggested template at Faculty Advancement website)*
    - 📂 **Prior Years' Performance Review Letters**
    - 📂 **Department & College Criteria**
      (*obtain a copy from your department or school administrative coordinator*)
    - 📂 **External Review Material** (if applicable)
    - 📂 **Teaching Effectiveness**
      - Significant Items 1-5
      - 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)
      - Peer Visitations/Evaluations
    - 📂 **Professional Growth**
      - Significant Items 1-5
    - 📂 **Service**
      - Significant Items 1-5

Note: if you have been on a leave of absence or had an extension in your probationary period, use your last six (6) active semesters.

4. For student evaluations, use Google Chrome, login to WebPortal:
   - Choose "Faculty Evaluation Result."
   - Under "Reports" in the left-hand menu, choose "By Section."
   - Select the "Department," "Period," and "Instrument," choose the "Detail" radio button, and click "Next."
   - Click the link for the particular section you want.
   - 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."

5. 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. Please note: if you upload your document in a non-PDF format such as Microsoft Word, the styling (headings, subtitles, etc), anchors, bookmarks, etc. will carry over to the "Reader View" and make it difficult for reviewers to navigate. We encourage converting these documents to PDF format before upload.
   - 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.

6. Rename your documents so that the file names accurately indicate the contents: i.e. "ECON 101 FA 2016," "HIST 101 Syllabus SP 2017."

7. 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.)
   - If you've added a file and receive a message that states "Creating PDF" for an extended amount of time, click on the Refresh button on your browser.
   - Click the "Review & Submit" button to preview contents. Ensure materials appear in the proper order.
   - Click "Submit" when you have successfully completed your uploads. **Do not submit your packet until ALL sections are complete.** After submission, you will not be able to edit the materials unless access is provided by your department coordinator.

8. 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.

9. 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. **Please do not attach any documents to your response/rebuttal letter**; any additional information or material must be submitted through the late-add process. Also 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.

10. To add materials to the packet after the WPAF closing date, contact department coordinator or college RTP rep to initiate the late-add process within Interfolio; a case will be created for you to upload the late-add. Please **do not** send late-add items directly to Faculty Advancement. See detailed Late-Add Instructions on the Faculty Advancement website.