



SAN DIEGO STATE
UNIVERSITY

Department Coordinator Guide to Interfolio RTP

1. Create a login or Log-in to Interfolio at www.interfolio.com using the link in the invitation email sent to you. For login assistance, please contact your College RTP Representative.
2. Assisting the Faculty Candidate:
 - 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. *Note: for 2nd or 3rd year candidates requesting reappointment AND tenure/promotion, you must create two (2) cases, one for reappointment, and one for promotion and/or tenure.*
 - 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.
 - Use the drop-down menu to select the “Type” of case you are creating (reappointment, promotion, tenure, etc.)
 - 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” closing 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.)

Note: There is a feature to create multiple cases; do not use this feature at this time.

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.

3. For Department-Level Check:

- After the candidate submits their case, you will be notified via email by Interfolio to be the 1st case review step. Review candidate materials (PDS Cover Sheet, etc.) for completeness and adherence to departmental policy requirements. After this is done, click “Send Forward” at the top of the page to move case to the College RTP Rep. (Use automated email message.)

4. For Department-Level Validation:

- Assist validators in updating and signing the PDS Cover Sheet; upload signed Cover Sheet to “Other Documents” section of the case.

5. 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 Review” section of the case in Interfolio with the name “Letter of Recommendation - _____” and one of the following descriptions: “Department Peer Review Committee,” “School Peer Review Committee,” “Department Chair,” or “School Director.”
- Upload an updated PDS Cover Sheet when each reviewer makes a recommendation.
- 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 #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 “Department Review” section.
 - 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 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.)

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 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 #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 review of response/rebuttal, assist reviewing body with completion of Response/Rebuttal Form and upload PDF to the “Department 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 #3)**
- If a reviewing body changes its original recommendation, revise the PDS Cover Sheet to reflect the new recommendation and upload to the Interfolio “Other Documents” section. Be sure to replace the older version of the PDS Cover Sheet with the revised version.

7. Late-Add:

- In the event a candidate adds material to the RTP packet after the WPAF closing date, Faculty Advancement will create a Late-Add Case in Interfolio for candidates to upload their materials.
- After reviewing body reviews late-add, complete Late-Add Instructions & Form with reviewer signature, and upload PDF to Committee Documents section of the Late-Add Case with the name “Late-Add Review - _____” and one of the following descriptions: “Department Peer Review Committee,” “School Peer Review Committee,” “Department Chair,” or “School Director.”
- After both reviewing bodies have reviewed the late-add materials, share a copy of the updated “Late-Add Form” with the candidate and previous reviewing bodies. **(See Sample #4)**
- If a late-add changes a recommendation, be sure to upload the completed log sheet and revised PDS Cover Sheet to the *Original Case* (under “Other Documents” section) to reflect the new recommendation with the word “revised” by the new date.

8. External Evaluations:

- 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 (December 1)
- 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 Email Template #5)

- 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 Candidate Documents section.
 - When the letters are received, the late-add process shall be used to include the evaluations in the performance review.
9. If a candidate resigns, retires, requests a withdrawal from the process, or a case has been created in error, contact your College RTP Rep.
10. A complete, step-by-step Interfolio guide is available [here](#). You may also call Interfolio's help-line at 877-997-8807.
-

Case Review Steps

1. Department/School Coordinator
 2. College RTP Rep
 3. Validation
 - a. Department/School Peer Review Committee
 - b. Department Chair/School Director
 - c. Department/School Coordinator
 4. College RTP Rep
 5. Department/School Peer Review Committee
 - a. Department/School Peer Review Committee
 - b. Department Chair/School Director
 6. Department Chair/School Director
 7. College RTP Rep
 8. College Peer Review Committee
 9. Department/School & College Committee Meeting
 - a. Department/School Peer Review Committee
 - b. College Peer Review Committee
 10. Dean
 11. Faculty Advancement
 12. UPTRP
 13. College Peer Review Committee & UPTRP Meeting
 - a. College Peer Review Committee
 - b. UPTRP
 14. Provost
 15. UPTRP & Provost Meeting
 16. Faculty Advancement
-

SAMPLE LANGUAGE FOR NOTIFICATIONS

#1 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. 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 letter of recommendation. Please log-in to Interfolio, open their case, under “Department Review” find and review the response/rebuttal addressed/titled to your reviewing body. After review is complete, select your decision on the Response/Rebuttal Form (or draft a letter), sign, and provide to department coordinator for upload.

#3 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).

#4 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).

#5 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 December 1. Please be advised, your evaluation cannot be held in confidence due to policy and contractual obligations of SDSU.
