



SAN DIEGO STATE
UNIVERSITY

Reviewer Guide to Interfolio Performance Review

Interfolio allows you to review RTP cases and take notes on a digital platform. All deliberation of the candidate's case by faculty committees should take place face-to-face. A complete, step-by-step, downloadable Interfolio "Evaluator's Guide" is available on-line [here](#). You may also call Interfolio's help-line at 877-997-8807. Your department coordinator and College RTP representative will also be able to assist you.

1. Create a login or log into Interfolio at www.interfolio.com using the link in the invitation email sent to you. For login assistance, please contact your department coordinator or College RTP Representative.
2. For Department-Level Validation: Review the items in the candidate's RTP packet for accuracy and completeness. If items need to be corrected, notify the candidate and the department coordinator. (Only department coordinators or College RTP Representatives can provide access to make changes in a submitted RTP packet.) If the packet is accurate and complete, see the department coordinator to sign the PDS Cover Sheet.
3. For Evaluation:
 - Select "View Cases" on the Interfolio Promotion & Tenure card.
 - Click the name of the candidate to be reviewed.
 - Click "Read" (top right corner of screen) to open the Reader View window.
 - Click on the carat next to the "Candidate Documents" section in the navigation pane (left side of screen) to view all documents uploaded by the candidate. Navigate to each document individually by clicking on its name.
 - Click on the carat next to the "Committee Documents" section in the navigation pane to view all documents previously uploaded by reviewers.
 - Click on the "Annotations" tab in the navigation pane (left side of screen) to make notes. Click the pencil (bottom right corner of screen) and select one of three options:
 - Point: This tool allows you to anchor a text box note in a specific area of the document viewed.
 - Area: This tool allows you to anchor a text box to a highlighted area of the document viewed.
 - Text: This tool allows you to anchor a text box to a highlighted section of text in the document viewed.
 - Annotations are like private "sticky notes," they cannot be seen by anyone else, cannot be shared, do not appear when candidate documents are printed, will not be discoverable when the case moves forward, but will be accessible to you if the case moves back to your level of review for any reason.
 - To delete annotations, select the annotation on the document reader pane and click the trash can at the bottom right hand corner of the screen.
 - To print annotations, on the Annotations tabs in the document reader review navigation pane, select the export icon in the top right of the Annotations tab to export your annotations to a PDF.
 - Click "Return to Case" and "Back to Cases" at the top left of the screen to return to the case list and begin your review of another case.
4. When Evaluation is Complete: Prepare your individual or committee recommendation letter (see template at Faculty Advancement website) and provide it to department coordinator or College RTP Representative, who will review, upload into Interfolio, and send to the candidate and previous reviewing bodies.
5. Response/Rebuttal: In the event of a response/rebuttal, you will be notified via email and assisted by the department coordinator or College RTP Representative.
6. Late-Add: In the event that a candidate adds material to the RTP packet after the WPAF closing date, you will be notified via email and assisted by the Office of Faculty Advancement.