



SAN DIEGO STATE
UNIVERSITY

RTP Rep Guide to Interfolio

Division of Student Affairs

1. Log-in to Interfolio at www.interfolio.com. For login assistance, please contact Faculty Advancement.
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 year candidates requesting reappointment AND tenure/promotion, you must create two (2) cases, one for reappointment, and one for promotion and/or tenure.*
 - Select “Add 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.
 - Enter candidate’s name and email address.
 - Will the Candidate Submit a Packet? Select “Yes.”
 - Enter WPAF/“Packet” closing date in the “Candidate’s Packet Due” field.
 - Do not change “Instructions to Candidate.”
 - Do not add “Case Data Forms,” click “Save & Continue.”
 - Do not change “Packet Requirements,” click “Save & Continue.”
 - Do not change “Case Review Steps,” click “Save & Continue.”
 - Select “Notify Candidate” to inform faculty candidate that their case is ready for documents to be uploaded. (Use automated email message.)

Only department coordinators and the RTP Representative can provide access to make changes in 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 Evaluation:
 - After department coordinator reviews the case, you will be notified via email by Interfolio to be the second case step. Review candidate materials for completeness and adherence to college policy requirements. After this is done, click “Send Forward” at the top of the page to move case to the first reviewing body. (Use automated email message.) You will also need to review letters from the department peer review committee and department chair/school director prior to department coordinator uploading and sending them to the candidate.

4. For Division-Level Evaluation:

- Review completed letters of recommendation from college committee and dean.
- Upload PDF copy of the recommendation letter to the Committee Documents section in Interfolio with the name “Letter of Recommendation - _____” and one of the following descriptions: “Peer Review Committee” or “Director.”
- Upload an updated PDS Cover Sheet to the Committee Documents section 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 Email Template #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.
- In the event a corrected or revised copy is needed, upload PDF copy of the updated recommendation letter to the Committee Documents section in Interfolio with the name “Corrected Letter of Recommendation - _____” or “Revised Letter of Recommendation - _____” and one of the following descriptions: “Peer Review Committee” or “Director.”
- 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.

5. 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 dean 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 Email Template #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 Director review of response/rebuttal, if there is a change in the recommendation, the reviewing body should complete the Response/Rebuttal Form or may submit a second letter specifying the details of that change. Either document should be uploaded as a PDF to the Committee Documents section with the name “Response/Rebuttal Decision - _____” and one of the following descriptions: “Peer Review Committee” or “Director.”
- Use the instructions in this guide to share the decision with the candidate and previous reviewing bodies. **(See Sample Email Template #3)**
- If a reviewing body changes its original recommendation, revise the PDS Cover Sheet to reflect the new recommendation and upload to the Interfolio Committee Documents section. Be sure to replace the older version of the PDS Cover Sheet with the revised version.

6. 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: “Peer Review Committee” or “Director.”
- After both reviewing bodies have reviewed the late-add materials, share a copy of the updated late-add log sheet with the candidate and previous reviewing bodies. **(See Sample Email Template #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* to reflect the new recommendation with the word “revised” by the new date.

SEE SAMPLE EMAIL TEMPLATES ON NEXT PAGE

#1 Sample Email Template for Letter of Recommendation

TO: Candidate
FROM: RTP Representative
SUBJECT: Letter of Recommendation from _____ (Peer Review Committee or Director) – 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 _____ (Peer Review Committee or Director).

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 or on the Faculty Advancement website.

#2 Sample Email Template for Response/Rebuttal Notification to Reviewing Body

TO: Reviewing Body
FROM: RTP Representative
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 Committee Documents 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 or RTP Representative for upload.

#3 Sample Email Template for Response/Rebuttal Decision

TO: Candidate
FROM: RTP Representative
SUBJECT: Response/Rebuttal Decision from _____ (Peer Review Committee or Director) – 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 _____ (Peer Review Committee or Director).

#4 Sample Email Template for Late-Add Review Decision

TO: Candidate
FROM: RTP Representative
SUBJECT: Late-Add Review Decision from _____ (Peer Review Committee or Director) – 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 _____ (Peer Review Committee or Director).
