

## Candidate Guide to Interfolio Performance Review (RTP)

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. You may also call Interfolio's help-line at 877-997-8807.



### 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.



### Log-in

- You no longer need an Interfolio account to access cases. Go to [www.interfolio.com](http://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 logging in?
  - 1) Make sure you are using Google Chrome.
  - 2) Double-check with your department to make sure the correct email address was used to create your case.
  - 3) Double-check with your department to make sure that your email address was spelled correctly.
  - 4) Check your email Spam for email.



### Packet Requirements

- ☞ **Personnel Data Summary**  
(see PDS Form for full details, on Faculty Advancement website, under Tenured/Tenure-Track Faculty, Performance Review, Performance Reviews: Information for Candidates)
  - Teaching Effectiveness Statement
  - Course Listing
  - Theses Chaired, Committee Memberships, Special Studies
  - Professional Growth Statement
  - Service Statement
  - COVID Interruptions
  - Curriculum Vitae (see suggested template at Faculty Advancement website)
- ☞ **Prior Years' Periodic Evaluations** (optional)
- ☞ **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 Feedback Surveys (formerly known as "student evaluations"; quantitative and qualitative data for all courses within the last 6 active semesters)  
*\*Spring 2020, Spring 2022, and Fall 2022 student feedback surveys are not required.*
  - Response/Rebuttals to Student Feedback Surveys
  - Major exams, and all *significant* assignments (for all courses within the last 6 active semesters)
  - Syllabi (for all courses – not sections - within the last 6 active semesters)
  - Peer Observations
- ☞ **Professional Growth**
  - Significant Items 1-5
- ☞ **Service**
  - Significant Items 1-5

**Note:** Significant items should represent efforts during the probationary period, or (for faculty seeking promotion to Professor) since last promotion. (Items from an academic appointment at another university are permitted. For faculty seeking tenure and promotion, so long as they date within the probationary period. For faculty seeking promotion to Professor, so long as they date within the time in rank.)



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## External Review Instructions

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If you would like to request an external review, you may do so at any time during the performance review process.

- External reviewers should be highly regarded and recognized professionals working in your field, holding a higher rank than your current rank, and located at a university or other institution that is wholly separate from SDSU.
- External reviewers should have an "arms-length" professional relationship with the candidate. Co-PIs, co-authors, former advisors, etc., are generally not appropriate reviewers, except in very small fields.

To initiate an external review, provide a set of six (6) names you would like to put forward as potential external reviewers, and two (2) names *not* to be included, to the department chair/school director. If you need assistance, please contact your department coordinator or college RTP representative; complete details on the process can be found [here](#).



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## Managing Materials

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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.
- **Document Naming Conventions.** Rename your documents so that the file names accurately indicate the contents:
  - Course Evaluations - Semester, Year, Course, Course Name (e.g., *Fall 2015 SOC 104 Introduction to Sociology*)
  - Reviewer Letters - Evaluator, Description - Candidate Last Name, First Initial (e.g., *Dean's Recommendation Letter – Smith, J*)
  - Candidate Response Letters - Response to Evaluator, Description - Candidate Last Name, First Initial (e.g., *Response to Dean's Recommendation Letter – Smith, J*)
- If you are the author of a published book, you may upload final galley proofs 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](#).



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## Student Feedback Surveys (formerly known as Student Evaluations)

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For Instructions on Downloading Archived Student Feedback Surveys from [WEBPORTAL](#).

For Instructions on Accessing Student Feedback Surveys in [my.SDSU/EXPLORANCE](#).



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## Uploading Materials

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- 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.
- When you have successfully completed your uploads, click the "Preview Packet" button to preview contents.
- **Do not click the dark blue "Submit" button in each section, or each section will be sent separately; submit your entire packet only when ALL sections are complete.**
- When you are ready to submit, check the small box in the blue taskbar (at the top of the page) to select all sections for submission. If a white "Submit Section" button appears in the blue taskbar, you have completed all of your requirements, and may proceed with submission. If that button is greyed out, you still have not fulfilled all requirements.
- After submission, you will not be able to edit the materials unless access is provided by your department coordinator.



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## Viewing Shared Files

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You will be notified by email when your evaluation letter is complete. Click the link in the email prompting you to log in to Interfolio, on your dashboard, under "Your Action Items" click on your name to view the packet; OR, click "Your Packets"

in the left hand navigation and select the case, open the “Shared Committee Files” tab of the case packet and files shared with you will appear listed.



### **Response/Rebuttal**

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After viewing your shared files, if you are allowed to respond to the content of the file, you will see a link labeled "Send Response," and a due date for when your response is due (which is within 10 days following receipt of an evaluation). A [Sample Response/Rebuttal Letter](#) has been provided on the Faculty Advancement website for guidance. **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 11:59 pm EST / 8:59 pm PST on that date, or change or preview your response. **As per direction from the CSU Chancellor’s Office, reviewers may only respond (within 10 days from the date of the response/rebuttal) if there is a change to their recommendation.**



### **Late-Add**

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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. Staff are not permitted to upload materials on your behalf. (See [Late-Add Instructions](#) on the Faculty Advancement website for more details.)