## Staff Guide to Interfolio

**Sabbatical/Difference-in-Pay Leave**

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.

### Eligibility Notification

- Department/school coordinators are responsible for notifying faculty of their eligibility to apply for Sabbatical/DIP leave and for notifying Faculty Advancement of eligible faculty who wish to apply for Sabbatical/DIP leave this year. Eligibility lists are available on the Faculty Advancement Sharepoint site.

- The following steps should be followed:
  - Notify all eligible faculty within your department/school that they are eligible to apply for Sabbatical/DIP leave. See [Sample Email #1](#).
  - Keep a list of all eligible faculty who have notified you of their intent to apply for Sabbatical/DIP leave this year.
  - Email the list of faculty applying for Sabbatical/DIP leave to Faculty Advancement with a copy to your college dean’s office.

- College Sabbatical/DIP representatives should complete the College Committees spreadsheet with all the relevant committee members and email the list to Faculty Advancement. The spreadsheet is located on the Faculty Advancement Sharepoint site.

### Log-in

- 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 with logging in?
  1. Make sure you are using Google Chrome.
  2. Double-check with Faculty Advancement to make sure the correct email address was used.
  3. Double-check with Faculty Advancement to make sure the correct email address was spelled correctly.
  4. Check your email Spam for email.

### Department-Level Review

- After the candidate submits their case, Faculty Advancement will be notified via email by Interfolio, as the 1st case review step. Faculty Advancement will confirm that the Sabbatical/DIP leave application packet is complete and that all the required materials are included.

- Once Faculty Advancement confirms the packet is complete and the faculty member is eligible, they will send the case forward to the department/school committee and the department/school coordinator.

- After the committee completes their review, finalizes their cover letter memo with rankings (See “Cover Letter Memo and Rankings” section below) and letters of recommendation, the department/school coordinator should go into each applicant’s case in Interfolio and do the following:
  - Upload the department/school committee’s recommendation letter in the “Department/School Review” section within the applicant’s case. See the “Recommendation Letters” section below.
  - Update “Status” to “Pending DEPT CHAIR Review.”
  - Click “Send Case” at the top of the page to move the case forward to the department chair/school director:
    - In the pop-up screen, check the box next to “Send a message to the reviewers gaining access”
    - Delete the auto-populated message and replace it with [Sample Email #2](#)
    - Click “Continue”

- After the department chair/school director completes their review, finalizes their cover letter memo with rankings (See “Cover Letter Memo and Rankings” section below) and letters of recommendation, the department/school coordinator should go into each applicant’s case in Interfolio and do the following:
  - Upload the department chair/school director’s recommendation letter in the “Department/School Review” section within the applicant’s case. See the “Recommendation Letters” section below.
  - Update “Status” to “Pending COL COMM Review”
  - Click “Send Case” at the top of the page to move the case forward to the college peer review committee and the college Sabbatical/DIP representative:
In the pop-up screen, check the box next to “Send a message to the reviewers gaining access”
Delete the auto-populated message and replace it with **Sample Email #2**.
Click “Continue”

**College-Level Review**

- Once the department chair/school director completes their review, the college peer review committee and the college Sabbatical/DIP representative will be notified via email by Interfolio.
- After the committee completes their review, finalizes their cover letter memo with rankings (See “Cover Letter Memo and Rankings” section below) and letters of recommendation, the college Sabbatical/DIP representative should go into each applicant’s case in Interfolio and do the following:
  - Upload the college committee’s recommendation letter in the “College Review” section within the applicant’s case. See the “Recommendation Letters” section below.
  - Update “Status” to “Pending DEAN Review”
  - Click “Send Case” at the top of the page to move the case forward to the dean:
    - In the pop-up screen, check the box next to “Send a message to the reviewers gaining access”
    - Delete the auto-populated message and replace it with **Sample Email #2**.
    - Click “Continue”
- After the dean completes their review, finalizes their cover letter memo with rankings (See “Cover Letter Memo and Rankings” section below) and letters of recommendation, the college Sabbatical/DIP representative should go into each applicant’s case in Interfolio and do the following:
  - Upload the dean’s recommendation letter in the “College Review” section within the applicant’s case. See the “Recommendation Letters” section below.
  - Update “Status” to “Pending PROVOST Review.”
  - Click “Send Case” at the top of the page to move the case forward to Faculty Advancement.

**Recommendation Letters**

- Department/school coordinator and college Sabbatical/DIP representatives should review recommendation letters prior to uploading and sending to the applicants.
- We suggest that completed letters of recommendation be reviewed for the following:
  1. Verify proper salutation and correct spelling of candidate name.
  2. Verify proper recommendation language (See “Sample Sabbatical/DIP Letter of Recommendation”)
  3. Verify proper effective date/academic year for recommendation.
- Once your review is complete:
  - Save the letter using the following naming convention: Evaluator, Description - Applicant Last Name, First Initial (e.g., Dean’s Recommendation Letter – Smith, J)
  - Open the case, go to the appropriate section of the case in Interfolio: “Department/School Review” or “College Review”.
  - Select “Add File”, on the next pop-up screen select either drag and drop, or upload the letter, then click “Save”. The document should appear in the chosen section.
- In the event a corrected or revised copy is needed, upload PDF copy of the updated recommendation to the appropriate section of the case in Interfolio: “Department/School Review” or “College Review.” Use the following naming convention: COPY TYPE Evaluator, Description – Applicant’s Last Name, First Initial (e.g., CORRECTED Dean’s Recommendation Letter – Smith, J). If it is a corrected copy, delete the old version; if it is a revised copy, leave the original.

**Cover Letter Memo & Rankings**

- Department/school coordinators and college Sabbatical/DIP representatives are responsible for ensuring that each level of review includes a separate cover memo with their recommendations.
- Cover memo should include the following:
  - For Type A Sabbaticals - Applicant name, department, semester requested, and ranking
  - For Type B Sabbaticals and Difference-in-Pay Leaves – Applicant name, department, semester requested
  - Candidates not recommended due to insufficient merit
- A sample cover memo is available on the Faculty Advancement website at [http://fa.sdsu.edu/tenure/leaves](http://fa.sdsu.edu/tenure/leaves) under, “Sabbatical or Difference-in-Pay Leave.” See “Sample Sabbatical/DIP Cover Memo.”
- In order to eliminate the need to upload the same cover letter memo into each case, only upload the cover letter memo into one of your candidates’ cases. Do not upload the cover letter memo into all of your cases.
  - Upload the cover letter memo into the candidate’s case that comes first alphabetically by last name.
  - Example: You have three candidates with the following last names: Jones, Miller, Smith. You will upload the cover memo into Jones’ case since their last name is first in the alphabet. Miller and Smith will not have the cover letter memo in their individual cases since the cover letter memo is already in Jones’ case.
• Faculty Advancement will retrieve and download the cover letter memo for each reviewing body. Once downloaded, the cover letter memo will be removed from Interfolio.

Moving Cases Forward/Backward in Bulk

• On the Case List page, select the box next to the cases you would like to move (forward or backward). An action bar will appear; on the action bar, select “Send Forward” or “Send Backward.”

• Another screen will open listing the cases that will be moved and to what case review step they will be moved to. The system will automatically select the box for sending a message to the candidate. Unselect the checkbox if you choose not to send a message. If you choose to send a message, you must include a subject and may use the message provided or see template notifications in this guide for other language. Click “Send” when you are ready to move the cases.
#1  Eligibility Notification

TO:  Candidate
FROM:  Department Coordinator
SUBJECT:  Sabbatical/Difference-in-Pay Leave Eligibility

Dear Candidate,

You are eligible to apply for Sabbatical/Difference-in-Pay leave in the 2019-2020 academic year, with leave to be taken in the 2020-2021 academic year.

This year, the Sabbatical/Difference-in-Pay leave application and review process will be done through Interfolio. As such, a case will need to be created for you if you wish to apply for Sabbatical or Difference-in-Pay leave. If you wish to apply for Sabbatical or Difference-in-Pay Leave this year, please respond with this email to confirm your intent to apply. Shortly after you submit your intent to apply, you will receive an email with a link to your Sabbatical/Difference-in-Pay leave case in Interfolio.

Please visit the Faculty Advancement website at [http://fa.sdsu.edu/tenure/leaves](http://fa.sdsu.edu/tenure/leaves) for more information about Sabbatical/Difference-in-Pay leaves. Should you have any question, please let me know. Thank you.

#2  Moving Case Forward to Next Review Level

TO:  Department Chair/School Director / College Peer Review Committee / Dean
FROM:  Department Coordinator or College Sabbatical/DIP Representative
SUBJECT:  Case Ready for Review - LAST NAME OF APPLICANT, FIRST INITIAL

Dear Reviewer,

Please log-in to Interfolio to review and rank the packet for the above-named candidate. Once reviewed, please write a letter of recommendation indicating whether you recommend or do not recommend the person for Sabbatical/Difference-in-Pay leave. A sample letter of recommendation and cover letter are available on the Faculty Advancement website at fa.sdsu.edu.

Should you need assistance, please contact your department/school coordinator. Thank you.

**CASE REVIEW STEPS**

1. Faculty Advancement
2. Department/School Peer Review Committee
   a. Department/School Peer Review Committee
   b. Department/School Coordinator
3. Department Chair/School Director
   a. Department Chair/School Director
   b. Department/School Coordinator
4. College Peer Review Committee
   a. College Peer Review Committee
   b. College Sabbatical/DIP Representative
5. Dean
   a. Dean
   b. College Sabbatical/DIP Representative
6. Faculty Advancement
7. Provost
8. Faculty Advancement