SDSU | San Diego State University

Reviewer Guide
to Interfolio Evaluations

Interfolio allows you to review evaluation cases and take notes on a digital platform. If you need assistance with this process, please contact your department coordinator and/or College RTP representative. If you need immediate assistance with the Interfolio site, you may call Interfolio's help-line at 877-997-8807.

Training

- In preparation for peer evaluations, all reviewers should watch the [RTP Review Preparation video](#) prior to validation, reviews, and/or deliberations.

Log-in

- You no longer need an Interfolio account to access cases. Go to 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.
- For faster navigation of Interfolio, use a workstation with Ethernet access versus wifi.
- 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.

Notifications

- When you have been added as a reviewer to Interfolio, you will receive an email with the subject line, "San Diego State University has added you as a Review, Promotion & Tenure user" from whomever created your account (department coordinator's name or college RTP rep's name). The "Activate Now" link in the email will expire in 30 days, so be sure to activate your account within that timeframe.
- When you receive a shared document, you will receive an email, follow the "View Files" link and you may access files that are shared with you, even if you no longer have access to a particular case. If you have trouble accessing the shared document, click on your Interfolio notifications (the bell in the top right corner on your dashboard) to access the files.
- Reviewers only have access to cases currently at their level of review.

Constituting Committees, Deliberation, Voting, and Confidentiality

Constituting Committees

- A **minimum of three (3)** tenured faculty members are needed to constitute a peer review committee.
- For **reappointment and tenure consideration,** reviewers must be tenured faculty employees of any rank.
- For **promotion consideration**, reviewers shall have higher rank than those being considered for promotion.
- For **post-tenure review**, reviewers must be tenured faculty employees of any rank.
- For **temporary faculty** evaluations, reviewers must be tenured faculty employees of any rank.
- Faculty candidates being considered for promotion shall not serve on promotion or tenure committees.
- Faculty members may serve on more than one committee as long as they do not review the same faculty employee at more than one level of peer review in one academic year.
- A department chair or school director who makes a separate recommendation shall not participate as a member of the departmental peer review committee but may serve as an external member of another department or college committee.

Deliberation & Voting

- Campus practice for voting follows CBA 15.45 where a simple majority of the committee membership is needed for recommendation.
- Absences and abstentions are not counted as "no" votes.

Confidentiality
- Deliberations are to be held confidential.

📄 Validation & Evaluation

Validation
- Please see Validation Checklist for validation guidelines on the Faculty Advancement website.

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 an 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 will not be seen by anyone else, cannot be shared, and do not appear when candidate documents are printed.
- To delete annotations, select the annotation on the document reader pane and click the trash can at the bottom right-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. If you export annotations, please treat these as your private, confidential notes.
- 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.
- When evaluation is complete, prepare your individual or committee recommendation letter (see Sample Periodic Evaluation Letter for Tenured & Probationary Faculty on the 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. Reviewers at the University level must use pre-approved templates to ensure equity, confidentiality, and compliance with all relevant policy and contractual requirements.

➦ Response/Rebuttal

In the event of a response/rebuttal, you will be notified via email to log-in and review the letter. **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.** Please coordinate with your department coordinator or College RTP Representative, who will review, upload into Interfolio, and send to the candidate and previous reviewing bodies.

➕ Late-Add

In the event material has been approved and added to the WPAF after the closing date, you will be notified via email to log-in and review the documentation. If your original recommendation was positive, you will not be required to respond and will be receiving a copy simply as notification. **If your original recommendation was unfavorable, you will be required to respond**. Please see the Sample Response to Late-Add Letter on the Faculty Advancement website. Please coordinate with your department coordinator or College RTP Representative, who will review, upload into Interfolio, and send to the candidate and previous reviewing bodies.