

Staff Guide to Interfolio Sabbatical/Difference-in-Pay Leave

Please visit the [Faculty Advancement: Leaves](#) website for full information regarding sabbaticals and difference-in-pay leaves.

A complete, step-by-step, Interfolio 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. 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 Notification #1.**

*Faculty on the eligibility report with a next application date indicated in the 2023/2024 academic **and** those who became eligible in a previous year but have not taken their leave need to be notified. (Ex. Faculty member's next application date is recorded as 2017/2018 but have not yet taken a leave must be notified they are eligible to apply.)*

- 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 your college dean's office.
- Faculty Advancement will provide a back-up notification directly to eligible faculty.

Log-in

- 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.
- 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 and spelled correctly.

Committees

- A minimum of three (3) tenured faculty members are needed to constitute a review committee.
- Faculty applying for a sabbatical or difference-in-pay leave shall not serve on review committees.

Case Preparation

Department/school coordinators are responsible for case creation.

- Obtain electronic signatures for reviewing bodies for recommendation letters
 - DEPARTMENT LEVEL: Department/School Peer Review Committee Chair **and** Department Chair/School Director
 - COLLEGE LEVEL: College Peer Review Committee Chair **and** Dean
- Department Coordinators should be responsible for adding department SAB/DIP review committee members to Interfolio.
- College sabbatical representatives should be responsible for adding college level SAB/DIP committee members to Interfolio.
 - Under the Review, Tenure, and Promotion menu, select "Users and Groups"
 - Select the "Committees" tab
 - In the "Search by committee name" bar, type the unit name of the member you'd like to update, select the pencil to the right of the committee name to edit
 - Remove existing committee members that are no longer serving on committees by selecting the "X" by their name.

- In the search bar, type the first name of the member you'd like to add to this committee, when the name appears, select "+Add" to the right of the name
- After you've added all of the names, click "Update"
- Do not select the star next to these names unless you want to assign someone as a committee manager; committee chairs do not need this designation.
- Please note that if a faculty member is applying for a sabbatical/difference-in-pay leave, they should not participate on the committee.

Case Creation

- On your dashboard, select "Cases" on the left-side navigation pane.
- Select "Create Case." Another window will appear; in the "Search for Candidate" field start typing the candidate's name and select accordingly. You may need to press "Enter" on your keyboard if the search bar is not auto-populating as you search. Select, "Add Candidate" and click "Continue. If a name is not appearing, we may need to add to the system; please contact facultyadvancement@sdsu.edu for support.
- **Select Case Settings:** use the dropdown to select Unit for Case. For "Type", to allow all templates for this unit to populate, do not select a "Type" (as it is not a required field).
- Under Select Template, choose the template (e.g., "ENS – Reappointment, Tenure, and Promotion") you are creating a case for and then click "Continue" **Only use templates with the departmental unit abbreviation as the prefix.**
- **Review & Settings:**
 - Case Information: verify this information is correct
 - Soft Deadline: You may add the submission deadline
 - Internal Case Sections: Do not change
 - Case Review Steps: It is not required to Edit Step Dates
 - Candidates: verify this information is correct
- Will the Candidate Submit a Packet? Select "Yes."
- Would you like to notify the candidates now? Select "No". (The system does not confirm that this has taken place, so we will notify on a different screen.) Select "Create Case".
- On the next page, select "Send Case" from the dropdown menu, select "Notify Candidate".
- Under Notify a Candidate, check the box "Include a personal message with this email" and see **Sample #2** for language; hit "Send" when you are ready to send the message.
- Change the Status to reflect "Case with Candidate".

Workflow of Case Review Steps:

- Do not change "Case Review Steps," unless for special circumstances, such as removing chair/director review if they are applying.

Once a candidate has submitted their packet it will automatically lock. Only department coordinators and the college sabbatical representative can provide access to make changes to 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.

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 Notification #3**.
 - Click “Continue”

****Note: Before submitting to department chair/school director, only applications deemed not worthy should be sent back to the applicant for revision and reviewed again by the committee. AY sabbatical leave requests are not included in the rankings as per the Collective Bargaining Agreement.*

- 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’ 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 Notification #3**.
 - 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 Notification #3**.
 - Click “Continue”

****Note: Before submitting dean, only DIP applications deemed not worthy should be sent back to the applicant for revision and reviewed again by the committee.*

- 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.

****Note: For both Sabbatical and Difference-in-Pay leave applications, any applicants not recommended by the dean must be notified in writing, giving the reasons.*

Recommendation Letters

- Department/school coordinator and college Sabbatical/DIP representatives should review recommendation letters prior to uploading and sending to the applicants.
- A sample letter of recommendation is available on the Faculty Advancement website at <http://fa.sdsu.edu/tenure/leaves> under, “Sabbatical or Difference-in-Pay Leaves.” See “Sample Sabbatical/DIP Letter of Recommendation.”
- 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> 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.

SAMPLE LANGUAGE FOR NOTIFICATIONS

#1 Eligibility Notification

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

Dear Candidate,

You are eligible to apply for a **Sabbatical and/or Difference-in-Pay** leave in the 2023/2024 academic year, with leave to be taken in the 2024/2025 academic 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> for more information about Sabbatical/Difference-in-Pay leaves. Should you have any questions, please let me know. Thank you.

#2 Case Creation Notification

TO: Candidate
FROM: Department Coordinator or College Sabbatical/DIP Representative
SUBJECT: Sabbatical/DIP Leave Case Available

Thank you for submitting your intent to apply for sabbatical or difference-in-pay leave for the 2023/2024 academic year (to be taken in the 2024/2025 academic year).

Your case is now ready in Interfolio. Please click the link in this email to access your case. When you are prompted to log in, go to > Sign In > Partner Institution > type San Diego State University > and you will be directed to Single Sign On. Log in with your SDSUId as the username and password associated with your SDSUId.

For your convenience, an Interfolio candidate guide is available for you to use during this process. Visit <http://fa.sdsu.edu/tenure/leaves> and review the information under “Information for Faculty.”

The deadline to submit your case is **Wednesday, October 18, 2023**. If you do not submit your case by the deadline, your case will be locked and you will no longer be able to apply for sabbatical or difference-in-pay leave this year. Please note that the system will not allow uploads after 11:59pm EST / 8:59 PST on this date.

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

#3 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 reviewer guide and 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