SDSU | San Diego State University

Staff Guide to Interfolio Performance Review (RTP)

Please review Interfolio guides or call Interfolio's help-line at 877-997-8807 as needed. College RTP reps can add faculty users; Faculty Advancement can add staff users. Unless otherwise instructed by your College RTP rep, a*dmin coordinators manage department-level committees and operations, and College RTP Reps manage college-level committees and operations.*

Log-in

Go to www.interfolio.com → Sign In → Partner Institution → San Diego State University → Single Sign-On→ username is SDSUid and associated SDSUid password.

Department/School Coordinator or College RTP Rep: Create review bodies and verify reviewers.

Follow the Interfolio guide to add new and remove committee members. (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.) Verify:

- Each committee has a minimum of three (3) tenured faculty members, none of whom are up for promotion.
- All faculty participating in promotion to "Full" reviews are "Full" Professors.
- Faculty are not serving at multiple levels of review.
- Department chairs/school directors may not serve on their own departmental committee if they plan to write a chair/director letter.
- If a department/school does not have enough faculty to constitute a committee, it may elect members from related disciplines.
- Chair / Director or Dean information is current.

Department/School Coordinator: Create case.

Follow the Interfolio guide for Case Creation.

- Case Settings: Only use templates with your department/school prefix. → Review & Settings: you may add submission deadline; do not change internal case sections, step dates or add required documents → Will the Candidate Submit a Packet? Select "Yes." → Would you like to notify the candidates now? Select "No".

Follow the Interfolio guide for Notifying the Candidate and use **sample memo below**:

> TO: Candidate
> FROM: Department Coordinator or College RTP Representative
> SUBJECT: Start Building Your RTP Case
>
> Please click the link in this email to access your case. When you are prompted to log in, go to > 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.
>
> Please visit the Faculty Advancement website (fa.sdsu.edu), under Tenured/Tenure-Track Faculty, Performance Reviews, Performance Reviews: Information for Candidates to assist you in this process. Should you need further assistance, first contact your department or school coordinator.

Once you have notified the candidate, change the case status to "Case with Candidate". The candidate will upload their materials and submit their packet; the case will lock automatically.

If a candidate needs to make changes: Only department/school coordinators and College RTP Reps can provide access to make changes: navigate to the candidate's case→identify the section that needs to be edited→select "Unlock." Notify the candidate when the section has been unlocked. The packet will automatically lock after the candidate resubmits.

Department/School Coordinator: Facilitate Validation by Faculty

After you receive email notification that the candidate has submitted their case, send the Case Forward, using the **sample memo below:**

TO:	Department Chair/School Director or Department Peer Review Committee Members
FROM:	Department/School Coordinator or College RTP Representative
	SUBJECT: Case Ready for Validation - LAST NAME of CANDIDATE, FIRST INITIAL

Please log-in to Interfolio to validate the packet for the above-named candidate, using the Validation Checklist to assist you in this process. Please note that faculty must perform validation, and return your completed validation checklist to the coordinator for upload.

Note: faculty must conduct validation and provide a completed Validation Checklist to the coordinator.

When you receive the completed Validation Checklist, ensure the file name is "Validation Checklist→ upload to the "Department/School Review" section→change the case status→select "Send Forward" at the top of the page. (Interfolio will provide an automated message to the next reviewer.)

Department/School Coordinator or College RTP Rep: Review, upload, and share letters

Review. (Letter Templates here) Please verify:
- Letter is signed. If it is not signed, send it back to the reviewer(s).
- Letter date matches the share date on the timeline.
- Candidate name is spelled correctly.
- Proper recommendation language is used, including appropriate academic year effective date.
- Response/rebuttal paragraph is included and the date is calculated correctly (10 calendar days after the letter date/date in which you are sharing the letter; if the 10th day falls on a weekend or holiday/campus closure, select the next business day).
- Copy notations are correct.

Upload:
- Save the letter using the following naming convention: Evaluator, Description - Candidate Last Name, First Initial (e.g., *Dean's Recommendation Letter – Smith, J*)
- Open the case→navigate to "Department/School Review" or "College Review"→ select "Add File"→select "Add New File"→upload the saved letter→select "Save."

Share with candidate (Interfolio guide here), using the **sample message below**:
- To initiate the response/rebuttal feature, select "Enable" under File Response on the Details pane.
  - 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, which is 11:59pm EST / 8:59pm PST on that date.
  - Use the dropdown menu under Section for Response to select the section in which the response/rebuttal statement will be saved. Select the "Department/School Review" or "College Review" section.

TO:	Candidate
FROM:	Department/School Coordinator or College RTP Representative
	SUBJECT: Letter of Recommendation from _____ [Department/School Peer Review Committee, Department Chair/School Director, College Peer Review Committee, or Dean] – LAST NAME of CANDIDATE, FIRST INITIAL

Please select the "View Files" link in this email which will prompt 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.

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). **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.

TO:　　　　Previous Reviewing Bodies
FROM:　　Department Coordinator or College RTP Representative
　　　　　　SUBJECT:　　Letter of Recommendation from ＿＿＿＿＿＿ [Department/School Peer Review Committee, Department Chair/School Director, College Peer Review Committee, or Dean] – LAST NAME of CANDIDATE, FIRST INITIAL

Dear Reviewer,

Please log-in to Interfolio to view a copy of the [Department/School Peer Review Committee, Department Chair/School Director, College Peer Review Committee, or Dean] recommendation for the above-named candidate.

Share with Committee Members ([Interfolio guide here](#)), **using the sample below:**
Update case status (e.g., "Pending Dean's Review") and move the case forward to the next reviewing body by the timeline deadline. (Interfolio will provide an automated email message to the next level of review.)

Note: Corrected or Revised Copies
- *If minor editorial changes are needed (i.e., procedural errors, incorrect cc, formatting, grammar), prepare a CORRECTED COPY. Date of the letter <u>does not</u> change. Old version is "hidden" in the file by selecting "Edit" → "Edit Settings" → "Access" → and clicking "Administrators Only" → "Update".*
- *If substantive changes are needed (i.e., recommendation) prepare a REVISED COPY. Date of the letter changes. Original copy is preserved in the file.*

Upload corrections and revisions to the appropriate section of the case, using the following naming convention: COPY TYPE Evaluator, Description - Candidate Last Name, First Initial (e.g., CORRECTED Dean's Recommendation Letter – Smith, J).

Department/School Coordinator or College RTP Rep: Share Response/Rebuttals

If you are notified that a candidate has submitted a response/rebuttal[1], share the letter only (no attachments permitted) with Committee Members ([Interfolio guide here](#)), **using the sample message below:**

TO:　　　　Reviewing Body
FROM:　　Department Coordinator or College RTP Representative
　　　　　　SUBJECT:　　Response/Rebuttal Notification - LAST NAME of CANDIDATE, FIRST INITIAL

The above-named candidate has submitted a response/rebuttal to your letter of recommendation. Please log-in to Interfolio, open their case, under ["Department Review" or "College Review"] find and review the response/rebuttal addressed/titled to your reviewing body. Or, if you no longer have access to the case, log-in to Interfolio, on your dashboard select "Files Have Been Shared With You", select "Committee Shared Files", and "View Files." As per direction from the CSU Chancellor's Office, reviewers may only respond if there is a change to their recommendation, and must respond within 10 days from the date of the response/rebuttal.

Department/School Coordinator or College RTP Rep: Late-Add Cases

If a candidate requests to add material after the WPAF closing date, create a late-add case in Interfolio ([Interfolio guide](#) and [Late-Add Instructions](#)):

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[1] NOTE: Department/School coordinators/College RTP Representatives will receive an automated message from Interfolio indicating "Response to Shared File" as long as they remain listed first in the review step.

- Case Settings: Only use templates with your department/school prefix. → under "Type" of case you are creating, select "Other." → select the late-add template with the departmental unit abbreviation as the prefix and (e.g., BIO – Late-Add) → Review & Settings: Skip fields through Will the Candidate Submit a Packet? Select "Yes"→ Would you like to notify the candidates now? Select "Yes" and enter **sample communication below**:

TO: Candidate
FROM: Department/School Coordinator or College RTP Representative
              SUBJECT: Late-Add Case Available

Please click the link in this email to access your case. When you are prompted to log in, go to > 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.

Please refer to the [Late-Add Instructions] to assist you in this process. Should you need further assistance, first contact your department or school coordinator.

Note: Candidates must upload their own materials.

Faculty Advancement will remove the reviewers that had 'positive' recommendations from the case review steps, forward to the late-add subcommittee, and then the first reviewing body that had a negative recommendation. If you are creating a duplicate template for a faculty member submitting more than one item (ex. "Late Add #2), DO NOT remove any case review steps from the template.

If review occurs at the department/school or college level: Upload Late-Add Letter to the "Committee Documents" section of the Late-Add Case.

Share with candidate ([Interfolio guide here]), using the **sample message below**:

TO: Candidate
FROM: Department Coordinator or College RTP Representative
              SUBJECT: Late-Add #___ Decision from _____ [Department/School Peer Review
              Committee, Department Chair/School Director, College Peer Review Committee, or Dean]

To find the decision to your late-add from the above-named reviewing body, please select the "View Files" link in this email which will prompt 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.

College RTP Reps: Organize External Evaluations

Note: Sciences and other colleges that request letters in time for arrival by the WPAF closing date may use the Interfolio "Request Evaluation" process outlined below. If a letter will not arrive by the closing date, route all external reviews through the late-add process.

[Instructions for External Review Process]

When you receive an external review form with an anticipated arrival date before the WPAF closing deadline, use the Interfolio "Request Evaluation" process:
- On your dashboard, select "View Cases"→select candidate name→select "Request Evaluation"
- Enter evaluator first name, last name, and email. To add multiple evaluators, select "Add Another Evaluator."
- Set a deadline (Note: the recipient will not be able to submit an evaluation after the deadline date.)
- Set who can access the request and the evaluation once it is uploaded. Click to open the dropdown list.
- Click "+Add" at the lower left of the request form; then click the "+" to add materials (CV, Professional Growth Statement, and 5 professional growth significant items)
- Enter message for the evaluator using the **sample below:**

TO: External Reviewer
FROM: Department Coordinator or College RTP Representative
            SUBJECT: External Evaluation for LAST NAME, FIRST NAME

Dear [ENTER REVIEWER NAME HERE],

On behalf of San Diego State University, I am writing to request an evaluation of Professor FIRST NAME LAST NAME, who is being considered for _____ (e.g., promotion to the rank of associate professor with tenure).

We seek your assessment of Professor _____'s research program and impact on your field of study and your perspective on whether their accomplishments merit the rank they seek. SDSU will provide the candidate's narrative of research / scholarship / creative activity, up to five (5) samples of their work, and a c.v.

Please note: due to policy and contractual stipulations, your evaluation will be shared with the candidate and cannot be held confidential.

We would need to receive your evaluation by [DEADLINE]. Kindly let me know whether you will be able to assist with this process. Sincerest thanks in advance for your consideration.

- Select "Preview" to review→ select "Send"
- Upload initial external review memo to the "External Evaluation Material" section. The request will appear in the "External Evaluations" section of the document queue with a status of "Pending" until evaluation is uploaded or request is denied.

Closing or Deleting Cases

If a candidate resigns, retires, requests a withdrawal from the process, or a case has been created in error, delete the case and contact your College RTP Representative.

If the wrong template has been used or a candidate's name or email is spelled incorrectly, the case must be deleted and recreated.

FOR COLLEGE RTP REPS: Sample Invitation to College Committee Meeting

TO: [FIRST NAME] [LAST NAME], Chair
            Department/School of [DEPARTMENT NAME] Peer Review Committee
FROM: [FIRST NAME] [LAST NAME], Chair
            College of [COLLEGE NAME] Peer Review Committee
SUBJECT: Tentative Recommendations that Differ on Promotion

The College Peer Review Committee has met and deliberated on candidates requesting tenure and/or promotion. Our tentative recommendation differs from the recommendations made by your department for the candidates below:

Name   College Recommendation   UPTRP Tentative Recommendation Area of Concern

In accordance with the Policy File under Faculty, Reappointment, Tenure, and Promotion Procedures, 4.56, we invite your committee to meet with us. We have set aside [DATE / TIME / LOCATION]; please confirm your attendance with the College RTP rep. The purpose of this meeting is to gain insight regarding how your committee reached its recommendation. The WPAF for the candidate(s) listed above is available for your review in Interfolio.

To maintain confidentiality and fairness to candidates, please do not discuss the content of this memorandum with anyone other than members of the peer review committee