

Probationary Faculty Guide to Interfolio Periodic Evaluations

Probationary faculty in years **2, 4, and 5** are evaluated by their school or department each **Fall**. (Faculty in their first year may waive this evaluation in lieu of a mentoring meeting with their department chair or school director. Librarian faculty first-year candidates that have been in rank longer than 6 months, complete a Periodic Evaluation their first fall; candidates with less than 6 months, have a mentoring meeting.)

Interfolio allows you to assemble and share documents for evaluation using a digital platform. Please prepare and upload your materials by the deadline posted in the Periodic Evaluations timeline. Your department coordinator or College RTP Representative will be able to assist you with many questions. You may also refer to the [Interfolio candidate guides](#) or call Interfolio’s help-line at 877-997-8807 for technical assistance.

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.






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. You may navigate to your case via this email or by logging into Interfolio.








Packet Requirements

For first year faculty, please use the appropriate [Mentoring Meeting Checklist](#).

Select the embedded links in the respective section for more information on each requirement.

	Requirement	Details
Academic Affairs	 Personnel Data Summary (see PDS form for full details)	Include: <ul style="list-style-type: none"> • Teaching Effectiveness Statement (sample) • Professional Growth Statement (sample) • Service Statement • COVID Interruptions • Curriculum Vitae
	 Prior Years’ Student Feedback Surveys (in at least two courses each year of the evaluation period ¹)	<ul style="list-style-type: none"> • Student Feedback Surveys • Response/Rebuttals to Student Feedback Surveys (optional)
	 Prior Years’ Periodic Evaluations and Performance Review Letters	If available
	 Peer Observation	If requested by department/school or candidate
University Library	 Personnel Data Summary (see PDS form for full details)	Include: <ul style="list-style-type: none"> • Library Service Effectiveness Statement • Professional Growth Statement • Service Statement • COVID Interruptions • Curriculum Vitae

¹ Spring 2020, Spring 2022, and Fall 2022 student feedback surveys are not required.

	 Peer Observation	One peer evaluation letter each year periodic evaluation is submitted
	 Prior Years' Peer Observations	Since Hire
	 Prior Years' Periodic Evaluations and Performance Reviews	Since Hire, if available
	 Annotated List of Items	<ul style="list-style-type: none"> • Complete write-up for at least one item in each of the three areas: Library Service Effectiveness, Professional Growth, Service. • Annotated list of up to four additional items in each of the three areas; each annotation (2-3 sentences) should characterize the contents, quality, and impact of each item. No more than five items should be provided in each area.
Student Affairs and Campus Diversity Faculty	 Personnel Data Summary (see PDS form for full details)	Include: <ul style="list-style-type: none"> • Counseling Effectiveness Statement • Professional Growth Statement • Service Statement • COVID Interruptions • Curriculum Vitae
	 Prior Years' Student Feedback and Satisfaction Surveys	Since hire
	 Prior Years' Periodic Evaluations and Performance Reviews	If available



Managing Materials

Collect your materials as PDF documents on your computer desktop.

- 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.
 - [How do I remove bookmarks in Adobe before uploading?](#)
- **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*)
- Interfolio instructions for uploading links to digital materials (art, recordings, video, etc.) are available [here](#).



Student Feedback Surveys

- Instructions on Downloading Archived Student Feedback Surveys from [WEBPORTAL](#).
- Instructions on Accessing Student Feedback Surveys in [my.SDSU/EXPLORANCE](#).
- Instructions on [Rebutting Student Feedback Surveys](#).



Uploading Materials

Follow the Interfolio guide to [upload your materials](#) and [submit your packet for review](#).

- Please note that after submission, you will not be able to edit the materials unless access is provided by your department coordinator.



Viewing Shared Files

You will be notified by email when your evaluation letter is complete. [Follow the Interfolio guide to access your evaluation.](#)



Response/Rebuttal

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). Use the [Sample Response/Rebuttal Letter](#) for guidance. Please do not attach any documents to your response/rebuttal letter. 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.