

Staff Guide to Interfolio Probationary and Tenured Periodic Evaluations

Please review [Interfolio guides](#) or call Interfolio's help-line at 833-844-2118 / Interfolio-support@elsevier.com as needed. College RTP reps can add faculty users using their SDSU email; Faculty Advancement can add staff users. [Please use the Interfolio Access Request Form to submit a ticket to add a user to the system](#). Unless otherwise instructed by your College RTP rep, admin 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 \(under Manage Committees heading\).](#)

Verify:

- Each committee has a minimum of three (3) tenured faculty members of any rank.
- 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:	Periodic Evaluation Case Available

Dear Faculty Member,

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](#) 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: Move Case Forward After Submission

After you receive email notification that the candidate has submitted their case, send the [Case Forward](#) and update case status.

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

Review. (Letter/Form Templates here for [probationary/tenured](#)) Please verify:

- Letter/form is signed. If it is not signed, send it back to the reviewer(s).
- Letter date matches the share date on the timeline ([probationary/tenured](#)).
- Candidate name is spelled correctly.
- Correct period of review. ([probationary/tenured](#))
- 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 Evaluation Letter – Smith, J*)
- Open the case→navigate to “Committee Documents”→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 “Committee Documents” section.

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

Dear Faculty Member,

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” on the left side navigation and select the case, open the “Shared Committee Files” tab of the case packet and files shared with you will appear listed.

Share with Previous Reviewing Bodies ([Interfolio guide here](#)), using the **sample below**:

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

Dear Reviewer,

Please log-in to Interfolio to view a copy of the [Department/School Peer Review Committee or Department Chair/School Director] evaluation for the above-named faculty member

Update case status (e.g., “Pending Dean’s Review”) and move the case forward to the next reviewing body by the timeline deadline.

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 does not 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 **CORRECTED 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/rebuttal¹, 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

Dear [Reviewing Body Receiving Response/Rebuttal],

The above-named faculty member has submitted a response/rebuttal to your evaluation. Please log-in to Interfolio, open their case, under [“Department 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.”

Closing or Deleting Cases and PAF Filing

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.

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.