A Candidate's Guide to Interfolio Review, Promotion, and Tenure

We have created a secure, user-friendly interface that allows candidates to quickly and easily assemble a packet of materials for their review and submit these materials online.

This article explains what to expect as the candidate of a review conducted using Interfolio's Review, Promotion, and Tenure service.

💡 You can generate a PDF and print this article from the sidebar to the left of this page.

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If your institution uses Interfolio Review, Promotion, & Tenure to conduct review processes online, you will be asked to submit a packet of review materials through Interfolio.

Before you begin, an administrator will create a case for you that includes instructions for submitting your packet with all the required documents and forms.

You will be notified that your case is ready via email.

Select "View Case" in the notification email

When you select "View Case" in this email you will be prompted to create a password that generates the Interfolio account you will use to collect and submit materials for your packet.

If you already have an Interfolio account, the "View Case" button will take you to your account dashboard.

Demo University has initiated a review on your behalf.

VIEW CASE

This case link will be valid for 30 days and can only be used once.

Viewing your case will allow you to view requirements, read instructions, and submit your packet online.
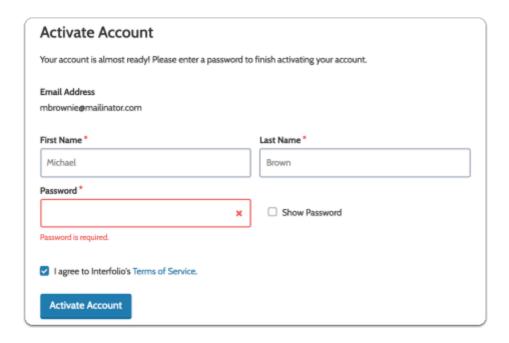
Hi Samantha,

Good luck with your promotion review...

Powered by Interfolio's **ByCommittee** | **Interfolio Support**

Activate your account

ℹ You may need to enter a password to activate your Interfolio account.

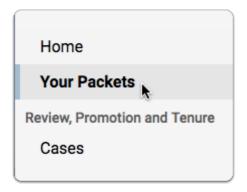# Enter a password and accept our Terms of Service and click to activate your account

Activate Account

Your account is almost ready! Please enter a password to finish activating your account.

Email Address
mbrownie@mailinator.com

First Name *

Michael

Last Name *

Brown

Password *

[✗]   ☐ Show Password

Password is required.

☑ I agree to Interfolio's Terms of Service.

[Activate Account]

View your packet instructions and requirements:

Click the link to "Your Packets" from the institutional page's navigation bar, or use the link on your homepage in the To-Do's

⚠ **Not seeing it?**
If you do not see this in your navigation bar, you might be on the Dossier page, Switch accounts user the account menu in the top right.
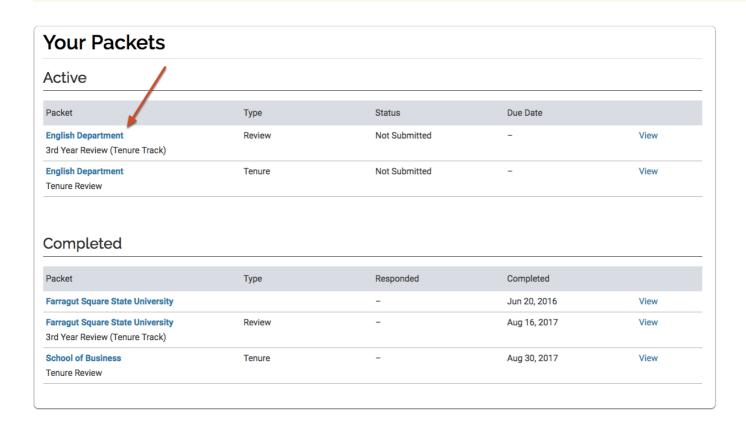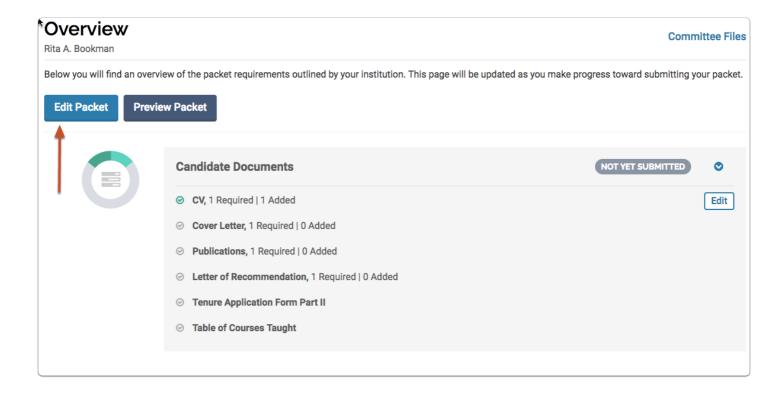
Home

Your Packets

Review, Promotion and Tenure

Cases

Select the relevant packet

Your Packets

Active

Packet	Type	Status	Due Date	
English Department 3rd Year Review (Tenure Track)	Review	Not Submitted	–	View
English Department Tenure Review	Tenure	Not Submitted	–	View

Completed

Packet	Type	Responded	Completed	
Farragut Square State University		–	Jun 20, 2016	View
Farragut Square State University 3rd Year Review (Tenure Track)	Review	–	Aug 16, 2017	View
School of Business Tenure Review	Tenure	–	Aug 30, 2017	View
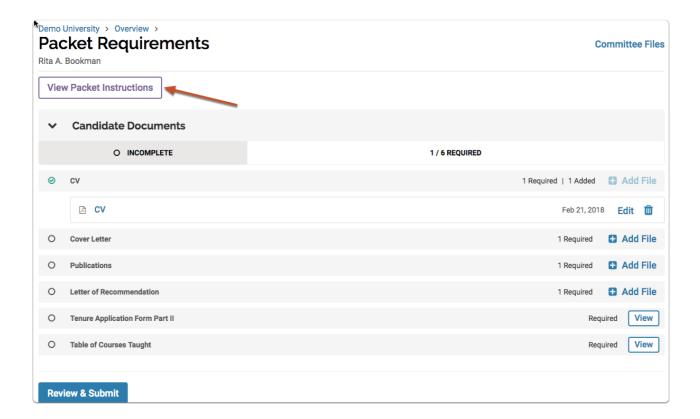
You will see an "Overview" page listing the required materials and forms you will need to add to your packet.

Click Edit Packet to view the instructions

Overview
Rita A. Bookman

Committee Files

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward submitting your packet.

Edit Packet   **Preview Packet**

Candidate Documents	NOT YET SUBMITTED	⌄
⊘ **CV,** 1 Required | 1 Added		Edit
⊘ **Cover Letter,** 1 Required | 0 Added		
⊘ **Publications,** 1 Required | 0 Added		
⊘ **Letter of Recommendation,** 1 Required | 0 Added		
⊘ **Tenure Application Form Part II**		
⊘ **Table of Courses Taught**		

Click "Instructions" in the upper right corner of the page to view any instructions provided by your institution for assembling your packet

Demo University > Overview >

Packet Requirements
Rita A. Bookman

Committee Files

View Packet Instructions

⌄ **Candidate Documents**		
○ INCOMPLETE	1 / 6 REQUIRED	
⊘ CV	1 Required | 1 Added	⊞ Add File
📄 CV	Feb 21, 2018	Edit 🗑
○ Cover Letter	1 Required	⊞ Add File
○ Publications	1 Required	⊞ Add File
○ Letter of Recommendation	1 Required	⊞ Add File
○ Tenure Application Form Part II	Required	View
○ Table of Courses Taught	Required	View

Review & Submit

Your packet will likely be divided into sections, each with a list of materials you will need to upload in order to complete each section.

If a due date has been set, you will also see the due date for each section. Each section of the packet can be submitted once all requirements for the section have been met.

> ❗ Note that individual packet sections can have unique due dates.
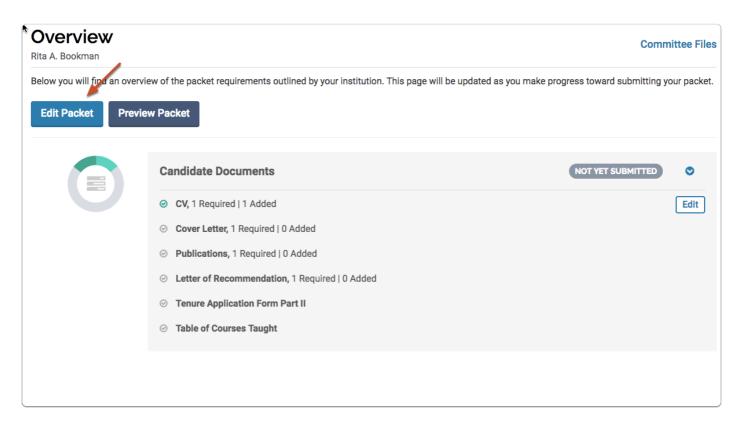
If enabled by an administrator, you may also be able to add sections to your packet. If this feature is enabled, you will see an "Add Section" button.
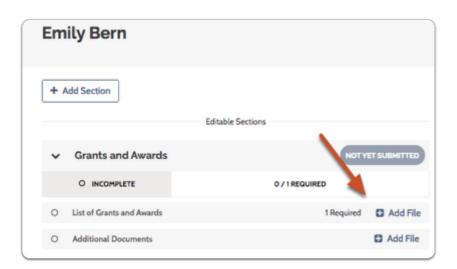
Add files to satisfy packet requirements:

Click "Work on Packet"

This will open a page where you can upload files to satisfy packet requirements.
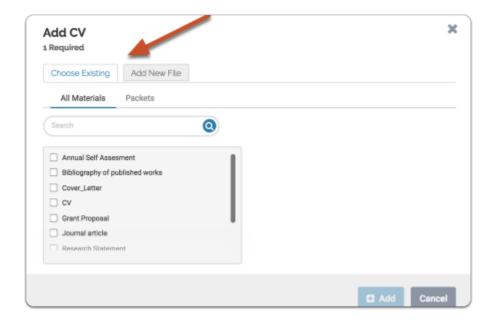
Click "Add File" to upload materials to your packet
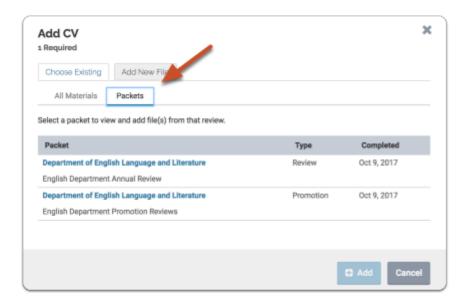
❗ When uploading files, make sure you give the materials in your packet a meaningful title because reviewers will see the titles you provide as bookmarks to the left of the page when reviewing your documents.
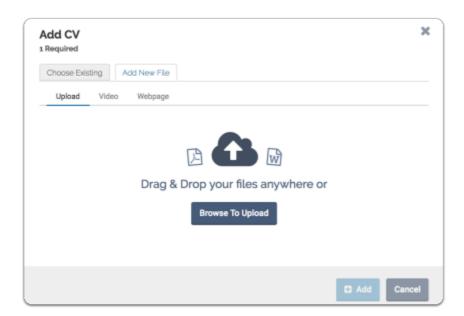
By default, the name that will appear to reviewers is the name of the file as you upload it, but you can also edit the title of a file after adding it to your packet.

💡 You can upload multiple files at one time.
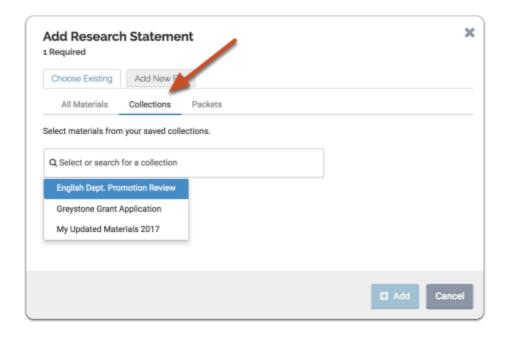
You can also add files from packets you have previously submitted:
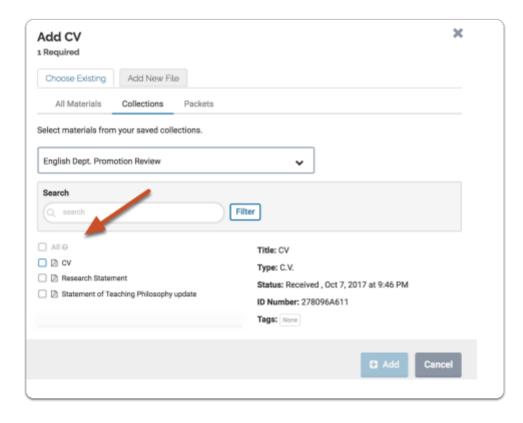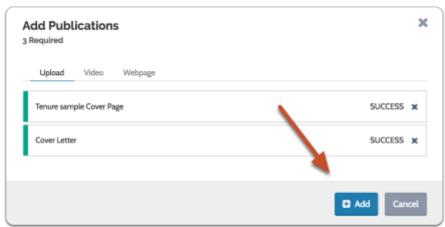
Or you can add new files including video and webpages:

If your institution subscribes to the feature, you can also add files from collections, including collections you may have created when using Interfolio's "Guidelines" feature, as shown in the two images below.
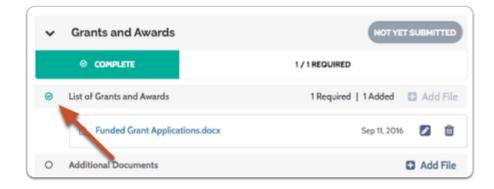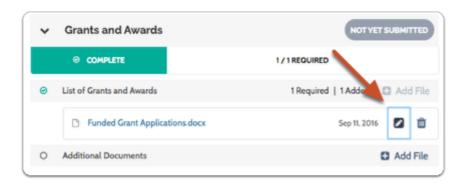
Look for the green check mark when you have satisfied a requirement

When a requirement is satisfied it appears with a green check mark. Likewise, completed sections are marked "Complete."
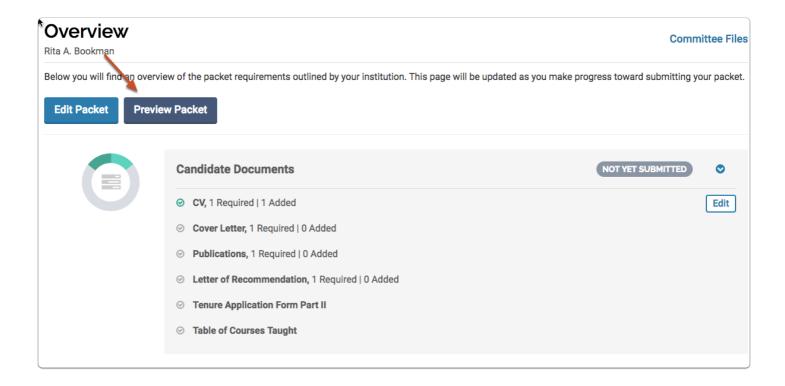
If you need to edit or replace a document, click the edit pencil

You can edit the title of the file, or click "Replace" to choose a new file to replace it.
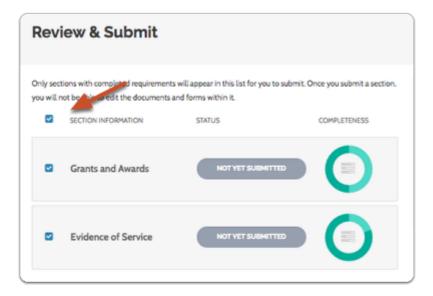
Click "Preview Packet" when you are ready to submit completed sections
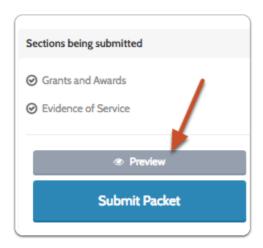
Select which sections of your packet you want to submit
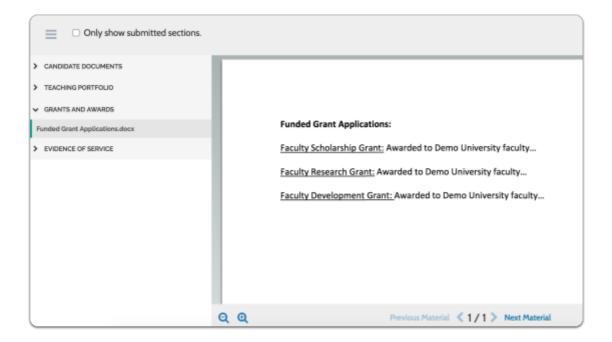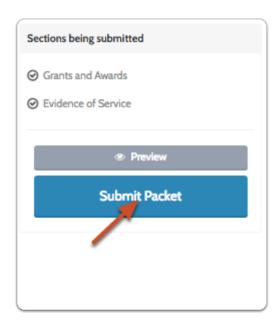
You can preview your packet before submitting:
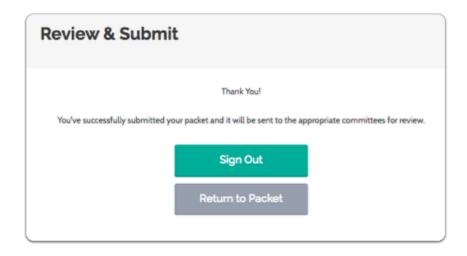
The preview shows exactly how the packet you are submitting will appear to your committee. A sample preview is shown below.
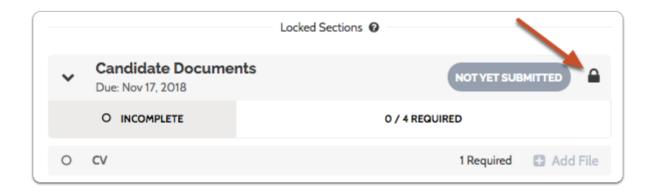
Click "Submit Packet" when you are ready

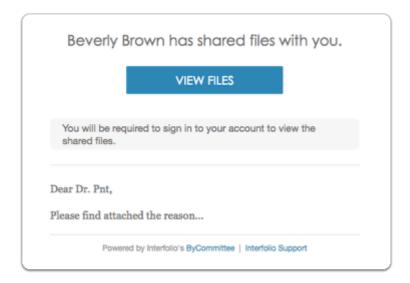Your packet will be sent to the appropriate committee for review.

Locked Sections

ℹ️ If a section is labeled as a "Locked Section," this means your institution has opted to restrict editing after submission. Please contact an administrator at your institution if you have questions about a locked section.
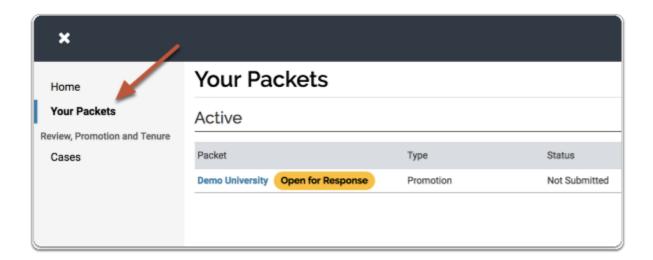
Viewing files shared with you by the committee:

The committee reviewing your case may share files for you to review. The committee may also allow you to respond to the shared files in writing, and may set a date when the response is due.
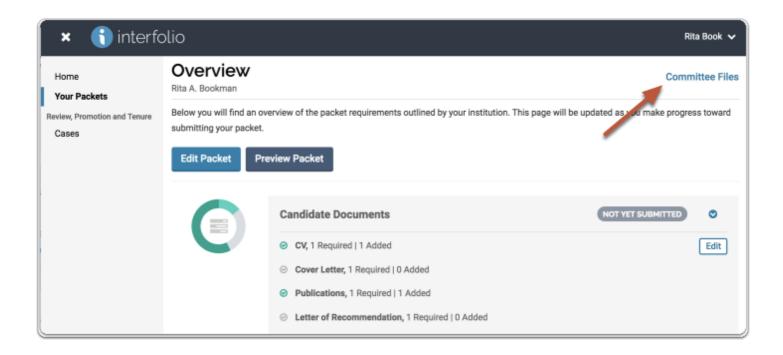
If the committee shares files with you, you will get an email prompting you to log in and view the shared files.

You will need to be logged in to view and/or respond to files shared with you by the committee
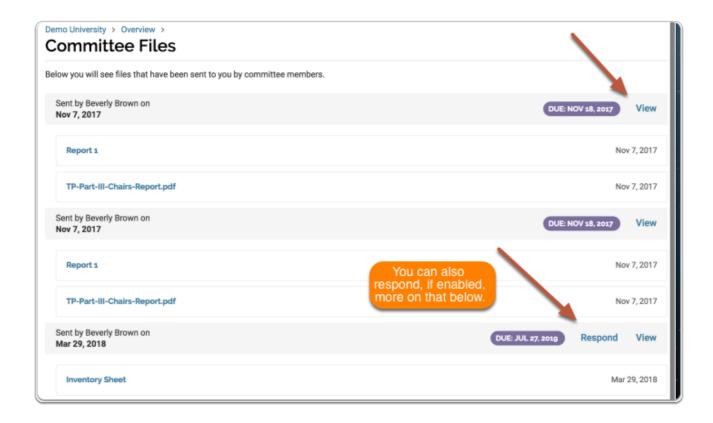

Once logged in, and within the relevant case. Click the "Committee Files" link

Open the file in our materials reader

You will see a list of files shared with you. Click the title of the file, or "View" to open the file in our materials reader
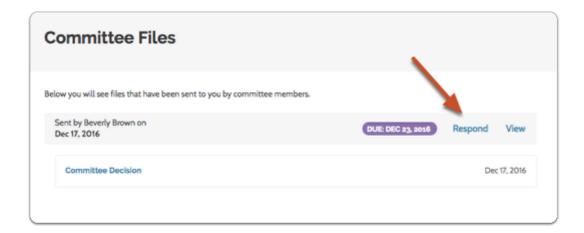
Responding to shared files:

If you are allowed to respond to the content of the file, you will see a link labeled "Respond," and a due date for when your response is due.

> ⊘ **Please Note:** This is a hard deadline, and you cannot respond to the shared files after the due date.
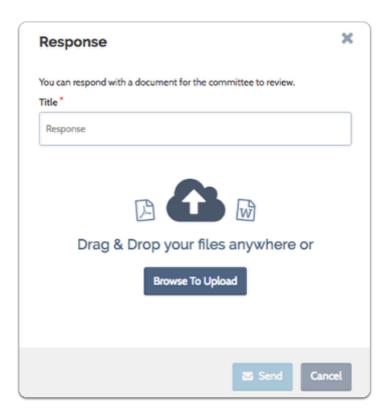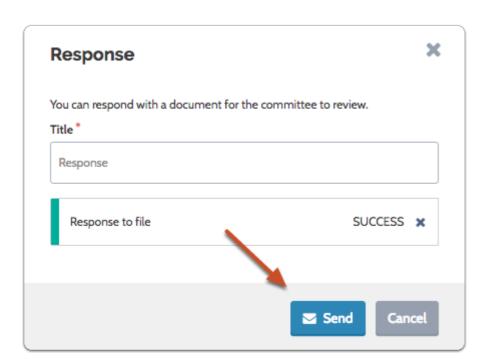

Click "Respond"

-or- open the file in our materials reader and click "Send Response"

Upload a file with your response

Click to "Send"

Submitted responses will appear along with shared files in the list Committee Files