

USER GUIDES

Table of Contents

Administrator's Guide to Interfolio Faculty Search.....	4
Your Interfolio Account Dashboard and Account Settings	5
User Roles in Interfolio's Faculty Search	13
User Titles in Faculty Search	20
Administration Settings Page in Interfolio Faculty Search	30
Communication in Interfolio Faculty Search	39
Position and Application Statuses.....	41
Custom Application Forms	43
Reporting In Faculty Search	44
Closing Positions	46
Guides for Faculty Search Job Applicants and Evaluators	47
Committee Manager's Guide to Interfolio Faculty Search	48
Job Applicant's Guide to Interfolio Faculty Search	50
Evaluator's Guide to Faculty Search.....	74
Administrator's Guide to Interfolio Review, Promotion, and Tenure	93
Your Interfolio Account Dashboard and Account Settings	94
Administration Settings Page in Interfolio Review, Promotion, and Tenure	102
Set Up Your Institution's Hierarchy.....	108
User Roles in Interfolio Review, Promotion & Tenure	109
Committees and Individual Reviewers	115
Templates and Cases.....	117
Case Materials	120
Workflow	121
Communication	122
Reporting.....	123
Forms.....	124
External Evaluations	125
Download PDF to Admin Guide to Interfolio Review, Promotion & Tenure	126
Guides for Candidates, Committee Members, Committee Managers, and External Evaluators	127
Committee Manager's Guide to Interfolio Review, Promotion, and Tenure	128

Best Practices for Managing Reviews With Interfolio Review, Promotion, and Tenure ...	130
Committee Member's Guide to Interfolio Review, Promotion, and Tenure	132
A Candidate's Guide to Interfolio Review, Promotion, and Tenure	144
For External Evaluators: Guide to Providing Requested Evaluations in Interfolio Review, Promotion, and Tenure	164
Help and Resources.....	173
Getting Help For Interfolio	174
Administrator's Guide to Interfolio Dossier	175
Quick Reference Guide to Dossier Institution for Faculty Members	176
Video Guides	183
Interfolio Help Videos (Legacy)	184

Administrator's Guide to Interfolio Faculty Search

Your Interfolio Account Dashboard and Account Settings

This article explains how your Interfolio account dashboard is configured, some basics on what you can do once you're there, and how you can access your account settings to change basic user information.

After signing in, you will see your account page. From here you can access all of the accounts you have with Interfolio and your Interfolio Account Settings.

Your Institution account page

You will find links to the Interfolio products to which you have access on the Interfolio account screen.

1. If your institution uses Review, Promotion & Tenure, Faculty Search, and Faculty180, than relevant pages will be displayed here.
2. You can also access your Dossier account (personally or institutionally created). If you have access to one, you can access it by the user menu in the top right corner.

Home

Faculty 180

Announcements & Help

Profile

Activities

Evaluations

Forms & Reports

Vitas & Biosketches

Find Colleagues

Account Access

Administration

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Welcome back, Scott Harris

Your Action Items

Associate Professor, Intercultural Studies

Department of Sociology | Faculty | Faculty Search

Assistant Professor of Landscape Architecture

Department of Architectural History | Faculty | Faculty Search

Assign Activity Classifications for Imported Scholarly Works

Activity Input | Faculty 180

Review Possible Duplicates from Activity Imports

Activity Input | Faculty 180

You have been named by a faculty member within your institution as a contributor to an intellectual or creative contribution.

Please verify.

Activity Input | Faculty 180


Additional Assigned Items

Search by keyword

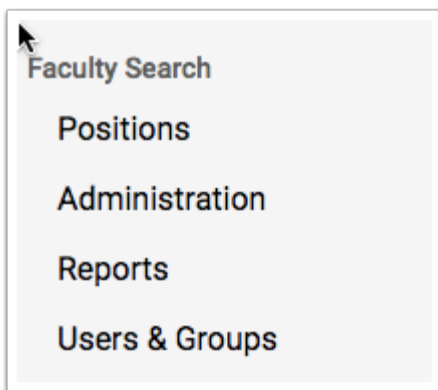
Institutional Branding

[Read about how to brand institutional products here.](#)


The Faculty Search Navigation Bar

-  Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Evaluators or Committee Managers in the program.

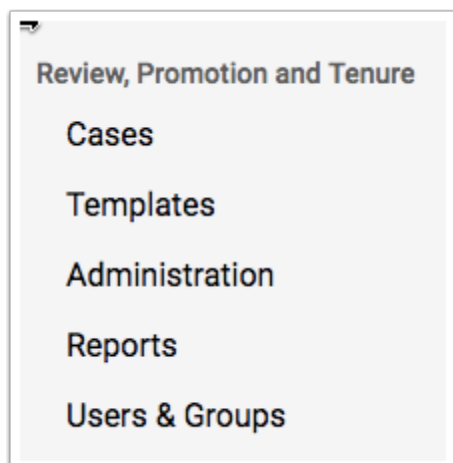
Click "View Positions" to view your active searches



The Review, Promotion, and Tenure dashboard:

-  Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Committee Managers or committee members in the program.

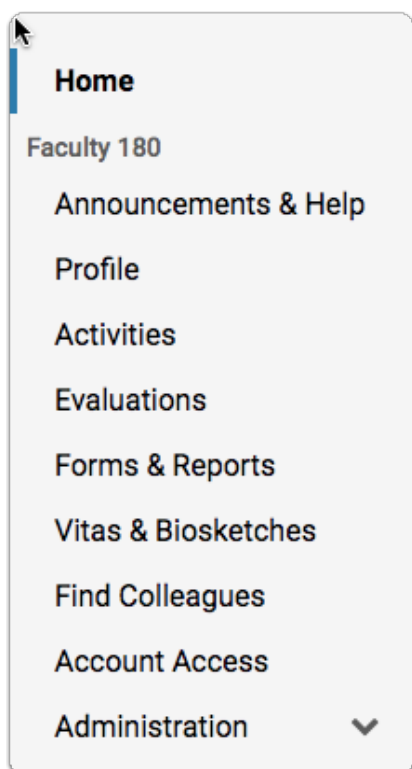
Click "View Cases" to access the cases you are managing or evaluating



The Faculty180 Navigation Bar

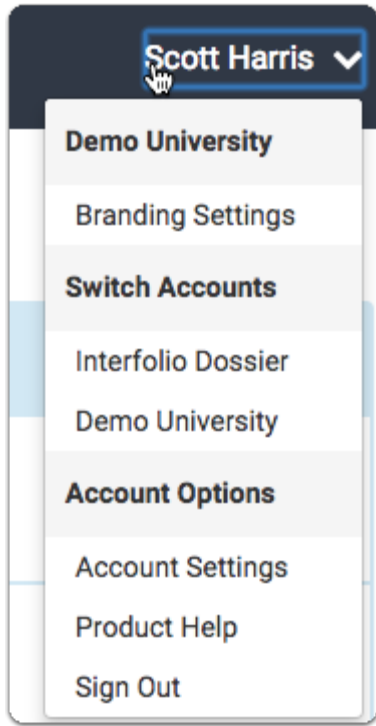
💡 Users will only see the relevant pages, depending on institutional settlings.

All administrative settings are in the Administration section




To access the settings for your account:

Click your name in the upper right hand corner of the screen and select "Account Settings" from the drop down menu.



The Account Settings page:

 The tabs below appear if you have a Dossier and Interfolio account.

Personal Information

From the "Basic information" tab of "Account Settings," you can access and manage personal information such as your career details, and also contain information like your address and degree. In other tabs you can find your email and notification settings, and any delivery ID numbers associated with your account, as well as some other settings.

Settings

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

Personal Information

First Name *

Scott

Last Name *

Harris

Status (Pick the option that best describes you) *

Tenure-track

Position Title

Assistant Professor

Organization

NYU School of Business

Scholarly Discipline *

Business

I am or would use Dossier to ... *

☐ Apply to jobs in higher education

☒ Apply to alternative academic jobs

☒ Apply to grants

☐ Apply to graduate degree programs

☐ Search for jobs

Communications

From the "Communications" tab, you can manage communication settings including how and when you receive email from Interfolio

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

Email

+ Add Email

Email notifications related to your Dossier account (such as renewal notices) will only be sent to your primary email address.

Primary

scott.harris@interfolio.com

If you have another account under a different email address you can merge the accounts to access all the information in one place. [Learn more about merging accounts](#)

Merge Accounts

Additional Email Addresses

You can sign in with these email addresses and your Dossier password.

scott.harris@sharklasers.com

Make Primary

X

Communications

Note: you will always receive important messages and notifications about your account, such as when you reset your password, or when a requested letter or evaluation arrives.

☐ Keep me informed about product updates, best practices, and promotions

User Guides

Page 9

ID numbers

Need to add ID numbers regularly to your deliveries? If so, than you can use the Interfolio ID storage tool to be able to easily store and attach it to your deliveries.

Settings

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

ID Numbers

+ Add ID Number

ID numbers are numbers that you can associate with a delivery to make sure the materials you are submitting go to the right place. These numbers are not required by Interfolio, but some institutions may require them.

AAMC	12345432345t432	X
------	-----------------	---

Subscription & Billing

From the "Subscription & Billing" tab, you can renew your account, add delivery credits, view your remaining deliveries, download all data and documents in your account, manage payment info, and view and download a record of your transactions.

Settings

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

Subscription

Dossier Deliver + Dossier Institution

Expires on Mar 25, 2019

☒ Automatically renew my subscription

[Apply an offer code to my next renewal](#)

[Download All Data & Documents](#)

Remaining Deliveries

49

[Add more deliveries](#)

Deliveries expire Mar 25, 2019

Payment Information

Credit Card

Visa ****1111

Expiration

9/2022

Name on Card

Scott Harriss

[Edit Credit Card](#)

Transaction History

Search

Transaction Date

MMM D, YYYY

to

MMM D, YYYY

Date	Description	Amount	Receipt
------	-------------	--------	---------

From the "Password" tab, you can change the password for your account

Settings

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

Signing In

Default account

When I sign in, take me to the following account by default:

☒ Demo University

☐ Dossier

☐ Ask me when I sign in

Note: if you are prompted to sign in when attempting to access a link, we will always take you to that link after you sign in regardless of this setting.

Password

Note: this sets the password for your Interfolio account only. If you log into Interfolio through your Google account or using your institutional ID and password, you will need to contact Google or your institution to change your password.

Enter your current password *

Current password

Enter your new password *

Notifications:

Users will receive alerts and notifications on the homepage in the to-do action items, urgent items with deadlines and mandatory response will appear at the top and the rest will overflow to a searchable table at the bottom.

User Guides

Page 11

Welcome back, Scott Harris

Your Action Items

[Associate Professor, Intercultural Studies](#)

Department of Sociology | Faculty | Faculty Search



[Assistant Professor of Landscape Architecture](#)

Department of Architectural History | Faculty | Faculty Search



[Assign Activity Classifications for Imported Scholarly Works](#)

Activity Input | Faculty 180



[Review Possible Duplicates from Activity Imports](#)

Activity Input | Faculty 180



You have been named by a faculty member within your institution as a contributor to an intellectual or creative contribution.

Please verify.

Activity Input | Faculty 180



Additional Assigned Items

Search by keyword



User Roles in Interfolio's Faculty Search

A user's role determines their capabilities in Interfolio Faculty Search. There are a few different types of users in the program: Institutional Administrators, Administrators, Committee Managers, Evaluators, and EEO Officers. Administrators can also be given EEO access.

Evaluators are assigned to one or more search committees or reviews by an Administrator or Committee Manager. Evaluators can view applications, add labels to applications, and if permissions allow, can add ratings and comments on applications.

Committee Managers supervise searches at the department level. Committee Managers can edit settings and statuses (if permissions allow), view reports, communicate with applicants, and evaluate applications.

Administrators can create, manage, and monitor searches at their assigned institutional level, or at units in the hierarchy below the unit they administer. They can also control settings and permissions for the units administer.

Institutional Administrators can control settings and view positions, applications, and reports across an entire institution. They can also set up workflows in the program for approving new positions, and approving new hires.

Equal Employment Opportunity Officers are usually staff from Human Resources, Institutional Diversity, or another campus office who are responsible for EEO standards and practices at an institution. EEO officers monitor and run EEO reports on positions to which they have access. They can also flag positions that may not meet an institution's diversity requirements.

See below for an overview of the functions of each role.

Interfolio Faculty Search User Role Capabilities

	Institutional Administrator (w/EEO access)	Administrator	Committee Manager	Evaluator	EEO Officer
<i>User Management and Administrative Settings</i>					
Add/edit and manage organizational units	TRUE	TRUE	FALSE	FALSE	FALSE
Add/edit and manage users	TRUE	TRUE	TRUE	FALSE	FALSE
Set user roles and permissions including granting user titles	TRUE	TRUE	FALSE	FALSE	FALSE
Add custom logo to the landing page of a position	TRUE	TRUE	FALSE	FALSE	FALSE
Add custom branding for an institution	TRUE	FALSE	FALSE	FALSE	FALSE
<i>Positions</i>					
View list of positions	TRUE	TRUE	TRUE	TRUE	TRUE
Create new positions from scratch	TRUE	TRUE	TRUE	FALSE	FALSE
Create new positions based on a previously created position	TRUE	TRUE	TRUE	FALSE	FALSE
Create an open rank search	TRUE	TRUE	TRUE	FALSE	FALSE

Set position to an active and open status	TRUE	TRUE	TRUE	FALSE	FALSE
Close a position	TRUE	TRUE	TRUE	FALSE	FALSE
Record the outcome of a search	TRUE	TRUE	TRUE	FALSE	FALSE
Indicate if positions need to be approved before posting	TRUE	TRUE	FALSE	FALSE	FALSE
Approve positions for posting (IF assigned as the approver)	TRUE	TRUE	FALSE	FALSE	FALSE
Publish the landing page for a position	TRUE	TRUE	TRUE	FALSE	FALSE
Create and manage EEO statements	TRUE	TRUE	TRUE	FALSE	FALSE
Create evaluation criteria for a position	TRUE	TRUE	TRUE	FALSE	FALSE
Set up a search as a blind review	TRUE	TRUE	TRUE	FALSE	FALSE
Create/edit document requirements for a position	TRUE	TRUE	TRUE	FALSE	FALSE
Create form requirements for a position	TRUE	TRUE	TRUE	FALSE	FALSE
Assign/Unassign committee members to search committee	TRUE	TRUE	TRUE	FALSE	FALSE

Set default, institution-wide position statuses	TRUE	TRUE	FALSE	FALSE	FALSE
Edit and assign position statuses	TRUE	TRUE	TRUE	FALSE	FALSE
Create/edit and manage custom application forms	TRUE	TRUE	TRUE	FALSE	FALSE
Create and manage EEO forms	TRUE	TRUE	FALSE	FALSE	FALSE
Set position change notifications	TRUE	TRUE	TRUE	FALSE	FALSE
Create and manage automated notifications (messaging templates)	TRUE	TRUE	TRUE	FALSE	FALSE
View notifications	TRUE	TRUE	TRUE	TRUE	TRUE
View referral sources for a position	TRUE	TRUE	TRUE	FALSE	FALSE
<i>Applications</i>					
View list of applicants for a position	TRUE	TRUE	TRUE	TRUE	TRUE
Customize the list view by adding custom columns to the list	TRUE	TRUE	TRUE	TRUE	TRUE
Create new columns using the answers to custom form questions (excluding EEO)	TRUE	TRUE	TRUE	TRUE	TRUE
Filter the list of applicants by	TRUE	TRUE	TRUE	TRUE	TRUE

degree, application status, rating, tags, and completion					
Save and restore customized views of the list including applied filters, keyword searches, columns, sort order, and pagination	TRUE	TRUE	TRUE	TRUE	TRUE
View applications	TRUE	TRUE	TRUE	TRUE	TRUE
Download applicant materials	TRUE	TRUE	TRUE	TRUE	TRUE
Set default, institution-wide application statuses	TRUE	TRUE	FALSE	FALSE	FALSE
Enable/disable comments and tagging on applications	TRUE	TRUE	FALSE	FALSE	FALSE
Send email messages to applicants	TRUE	TRUE	TRUE	FALSE	FALSE
Share applications by email	TRUE	TRUE	TRUE	FALSE	FALSE
Assign/change application statuses	TRUE	TRUE	TRUE	FALSE	FALSE
Archive/ unarchive applicant records	TRUE	TRUE	TRUE	FALSE	FALSE
Add new applicant records to the system (create an	TRUE	TRUE	TRUE	FALSE	FALSE

application on behalf of an applicant)					
Add materials to an application on behalf of an applicant	TRUE	TRUE	TRUE	FALSE	FALSE
Create and apply tags to applications	TRUE	TRUE	TRUE	TRUE	FALSE
Rate and comment on applications	TRUE	TRUE	TRUE	TRUE	FALSE
Annotate (add notes) to application materials and export your annotations	TRUE	TRUE	TRUE	TRUE	FALSE
<i>Reports & Logs</i>					
Run standard reports	TRUE	TRUE	TRUE	FALSE	TRUE
Run EEO reports that include detailed and individual responses	TRUE	FALSE	FALSE	FALSE	TRUE
Run EEO reports including only response summaries, no individual responses	TRUE	TRUE	TRUE	FALSE	TRUE
Download Reports	TRUE	TRUE	TRUE	FALSE	TRUE
View / download summary of EEO responses	TRUE	TRUE	TRUE	FALSE	TRUE

Flag Positions for Potential EEO Issues	TRUE	FALSE	FALSE	FALSE	TRUE
View / download detailed EEO responses	TRUE	FALSE	FALSE	FALSE	TRUE
Report on the outcome of a search	TRUE	TRUE	TRUE	FALSE	FALSE
View System Logs	TRUE	TRUE	TRUE	FALSE	FALSE

User Titles in Faculty Search

Users with the role of "Administrator" in Faculty Search can also be assigned a title such as Dean, or Department Chair, in the unit they administer and all units below. This title will allow them to approve positions created by all units they administer before they can be posted.

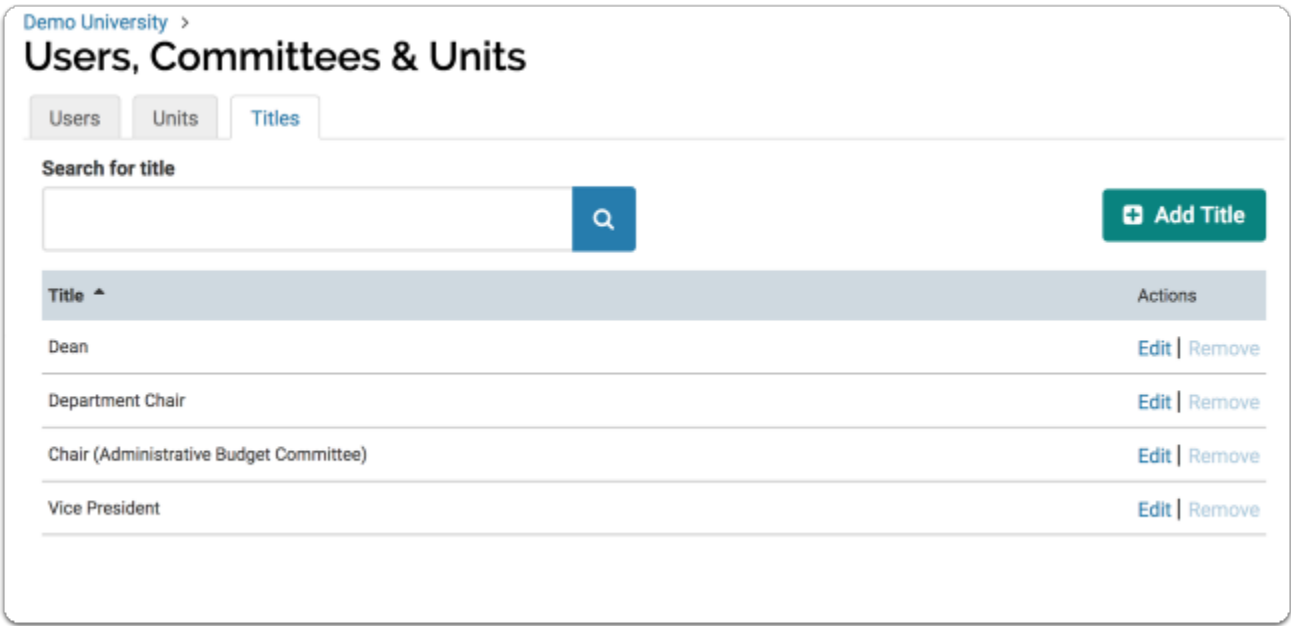
In this article:

- [About User Titles](#)
- [Creating User Titles](#)
- [Assign Titles to an Administrator From Users & Groups](#)
- [Select a user to administer a position based on unit and title](#)
- [Add additional administrators as approvers](#)
- [Units without approvers](#)

About User Titles

Users with the role of "Administrator" in Faculty Search can also be assigned a title such as Dean, or Department Chair, in the unit they administer and all units below. This title will allow them to approve positions created by all units they administer before they can be posted.

Titles are created on the "Titles" tab of the Users & Groups page of Faculty Search.



Titles are then assigned to administrators when editing the user's permissions.

Edit User

Permissions

Role

A user's role determines their capabilities in the program. [Learn more about User Roles.](#)

Role	Unit	Actions
Administrator	Department of Civil Engineering	Remove

+ Add Role

Title

A title can be assigned to the unit of the administrator's current role or a unit below. [Learn more about titles.](#)

Title	Unit	Actions
Department Chair	Department of Civil Engineering	Remove
Chair (Administrative Budget Committee)	Department of Civil Engineering	Remove

+ Add Title

Options

During the process of creating approval templates, the titles created here become available when selecting an administrator to fill a given title for a given unit.

The administrator creating the approval template has the option to name an administrator as the approver of the position at that step based on unit and title.

The administrator selects the title from a dropdown menu.

Who is approving the position at this step? *

☐ an administrator
 ☒ an administrator based on unit and title

Administrators with the title you select will automatically be assigned to approve positions for the unit in which the position is created. Multiple administrators can be assigned if one or more have the same title in the same unit.

Select a user by title

Search for a title

Dean

Department Chair

Chair (Administrative Budget Committee)

Vice President

The administrator(s) who hold the title selected will automatically be appointed to approve the position at the current step for the unit in which the position was created.

Administrators with the title you select will automatically be assigned to approve positions for the unit in which the position is created. Multiple administrators can be assigned if one or more have the same title in the same unit.

Select a user by title

Department Chair

▼

Please review this list, and select one or more approvers for each unit, or the highest unit.

Units without Approvers

All Units

Search by unit or approver name

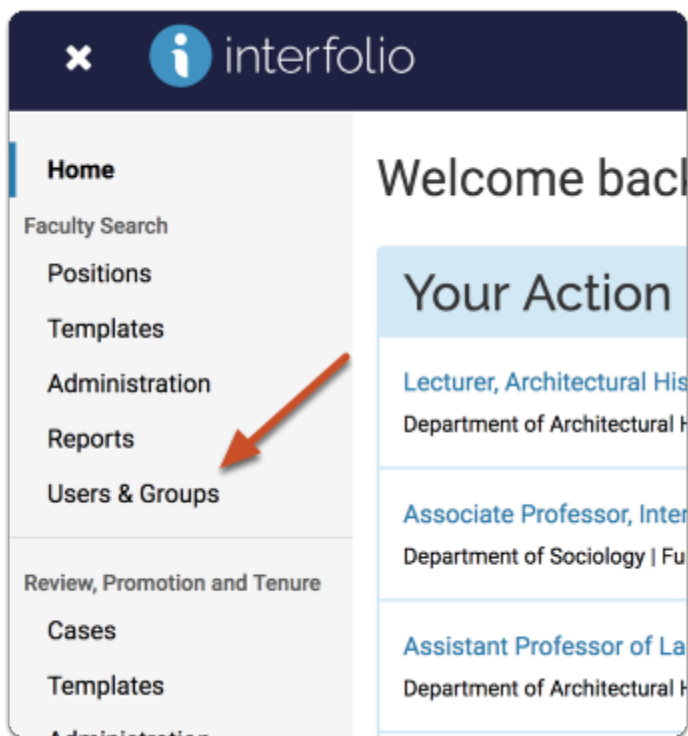
Q

Unit	Approver(s)	Action
Department of Civil Engineering	Pamela Barnes	Add Approver
	Scott Harris	
	Scott Harris	
	Festus Clamper	

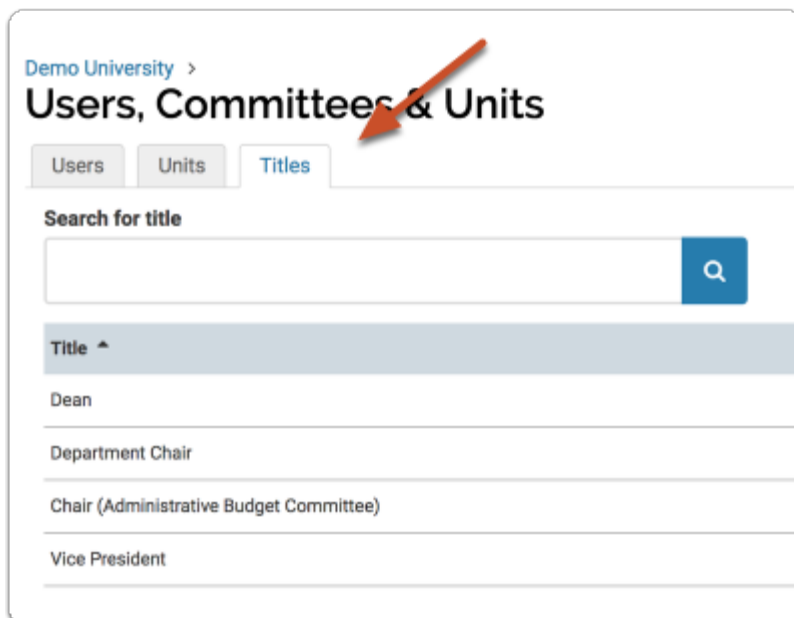
Creating User Titles

Institutional Administrators can create, edit, and delete titles if they are not linked to an active position or workflow template. Titles are created from the Users & Groups section of Faculty Search.

Select "Users & Groups" from the left hand navigation bar under Faculty Search



Open the "Titles" tab



Click "Add Title"

Demo University >

Users, Committees & Units

Users Units **Titles**

Search for title

Title ^	Actions
Dean	Edit Remove
Department Chair	Edit Remove
Chair (Administrative Budget Committee)	Edit Remove
Vice President	Edit Remove

Enter the title and click "Save"

Add Title

×

Title

Assign Titles to an Administrator From Users & Groups

Titles are assigned to administrators when editing the user's permissions. A title can be assigned to the unit of the administrator's current role or a unit below.

Open the "Users" tab and select a user with the user role of "administrator"

emo University >

Users, Committees & Units

Users

Units

Titles

Search for users

Q

User ^

Role & Unit

Additional

Pamela Barnes

Administrator | Department of Civil Engineering

Chair (Ac

James Berry

Administrator | College of Arts and Sciences

+ 1 more

Leonard Bishop

Administrator | Demo University

Michael Richan

In the "Edit User" window, scroll all the way down and click "Add Title"

Edit User

James

Berry

Email *

jbbb@demo.edu

Update

Cancel

Permissions

Role

A user's role determines their capabilities in the program. Learn more about User Roles.

Role

Unit

Actions

Committee Manager

Demo University

Remove

Administrator

College of Arts and Sciences

Remove

+ Add Role

Title

A title can be assigned to the unit of the administrator's current role or a unit below. Learn more about titles.

Title

Unit

Actions

+ Add Title

Options

Select a unit and title and click "Save"

Permissions

Title

A title can be assigned to the unit of the administrator's current role or a unit [more about titles.](#)

Select Unit

College of Arts and Sciences

▼

Select Title

Vice President for Administration and Finance

▼

Save

Cancel

Users can be assigned multiple titles at their unit and below it. Click "Remove" to remove a title

Title

A title can be assigned to the unit of the administrator's current role or a unit below. [Learn more about titles.](#)

Title	Unit	Actions
Vice President for Administration and Finance	College of Arts and Sciences	Remove
Department Chair	Department of Biology	Remove

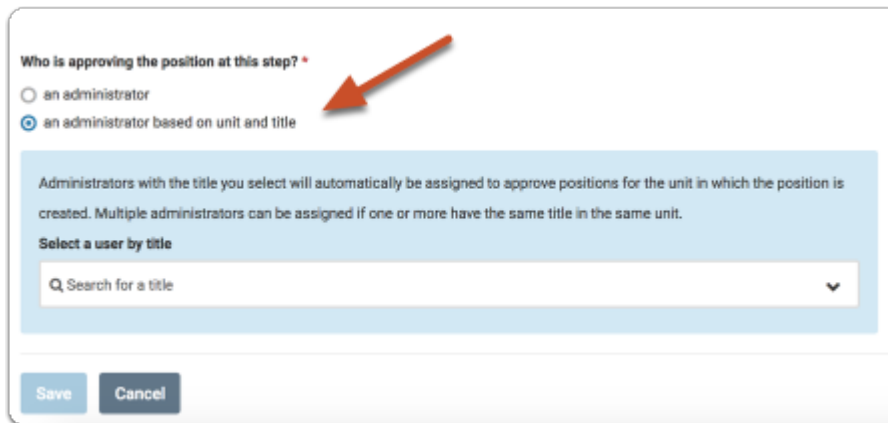
+ Add Title

Options ▼

Select an administrator to approve a position based on unit and title

During the process of creating approval templates, an administrator has the option to name another administrator as the approver of a particular position type at the given step based on unit and title.

When indicating who will approve a position at a given step, select "an administrator based on unit and title"



Who is approving the position at this step? *

☐ an administrator

☒ an administrator based on unit and title

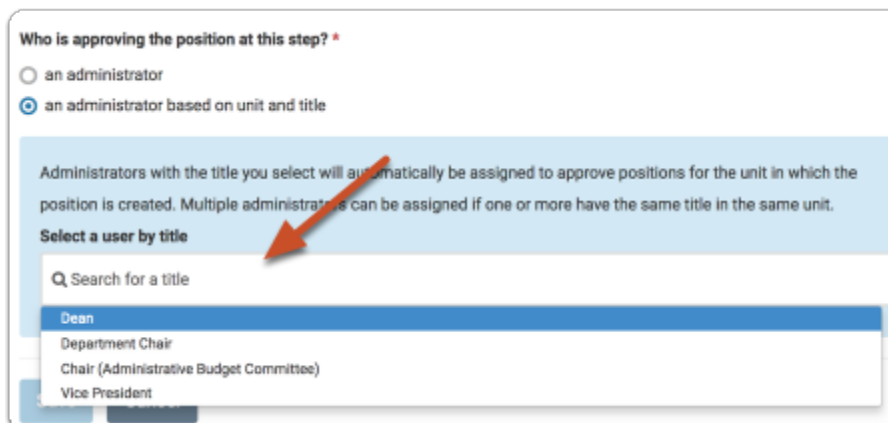
Administrators with the title you select will automatically be assigned to approve positions for the unit in which the position is created. Multiple administrators can be assigned if one or more have the same title in the same unit.

Select a user by title

Q Search for a title

Save Cancel

Select the title from the dropdown list



Who is approving the position at this step? *

☐ an administrator

☒ an administrator based on unit and title

Administrators with the title you select will automatically be assigned to approve positions for the unit in which the position is created. Multiple administrators can be assigned if one or more have the same title in the same unit.

Select a user by title

Q Search for a title

- Dean
- Department Chair
- Chair (Administrative Budget Committee)
- Vice President

The administrator(s) who hold the title selected will automatically be appointed to approve the position at the current step for the unit in which the position was created.

Administrators with the title you select will automatically be assigned to approve positions for the unit in which the position is created. Multiple administrators can be assigned if one or more have the same title in the same unit.

Select a user by title

Department Chair

Please review this list, and select one or more approvers for each unit, or the highest unit.

Units without Approvers All Units

Search by unit or approver name

Unit Approver(s) Action

Department of Civil Engineering Pamela Barnes
Scott Harris
Scott Harris
Festus Clamper

Add Approver

Add additional administrators as approvers

If necessary, add additional administrators as approvers by selecting an administrator to fill the title designated to approve the position at the current step.

Click "Add Approver"

Administrators with the title you select will automatically be assigned to approve positions for the unit in which the position is created. Multiple administrators can be assigned if one or more have the same title in the same unit.

Select a user by title

Department Chair

Please review this list, and select one or more approvers for each unit, or the highest unit.

Units without Approvers All Units

Search by unit or approver name

Unit Approver(s) Action

Department of Civil Engineering Pamela Barnes
Scott Harris
Scott Harris
Festus Clamper

Add Approver

Search for and select an administrator to fill the title for the unit

Add Title

Select an administrator to fill the title of "Department Chair" for the unit **Department of Civil Engineering**

Search for name or email address

Name	Email	Action
Leonard Bishop	leonard.bishop@interfolio.com	Add
Demo Support IA	demosupportia@interfolio.com	Add
Daniel Garcia	daniel.garcia@interfolio.edu	Add
Blothar Brown	blothar.brown@interfolio.com	Add
Festus Clamper	fcc@demo.edu	Add
Pamela Barnes	pbb@demo.edu	Add
Scott Harris	scott.harris@sharklasers.com	Add

Units without approvers

If a unit at or below the unit in which the template is being created does not have one or more approvers with the title selected, the administrator creating the template will see a list of units without approvers, and must choose one or more administrators to fill the selected title for each unit without an approver.

Administrators with the title you select will automatically be assigned to approve positions for the unit in which the position is created. Multiple administrators can be assigned if one or more have the same title in the same unit.

Select a user by title

Vice President

Please review this list, and select one or more approvers for each unit, or the highest unit.

[Units without Approvers](#)[All Units](#)


Unit	Approver(s)	Action
Department of Classics	None	Add Approver
Shakespeare	None	Add Approver

Administration Settings Page in Interfolio Faculty Search

From the "Administration" page of Faculty Search, Administrators can control settings for their assigned unit(s), and Committee Managers can control settings and permissions for the positions they manage.

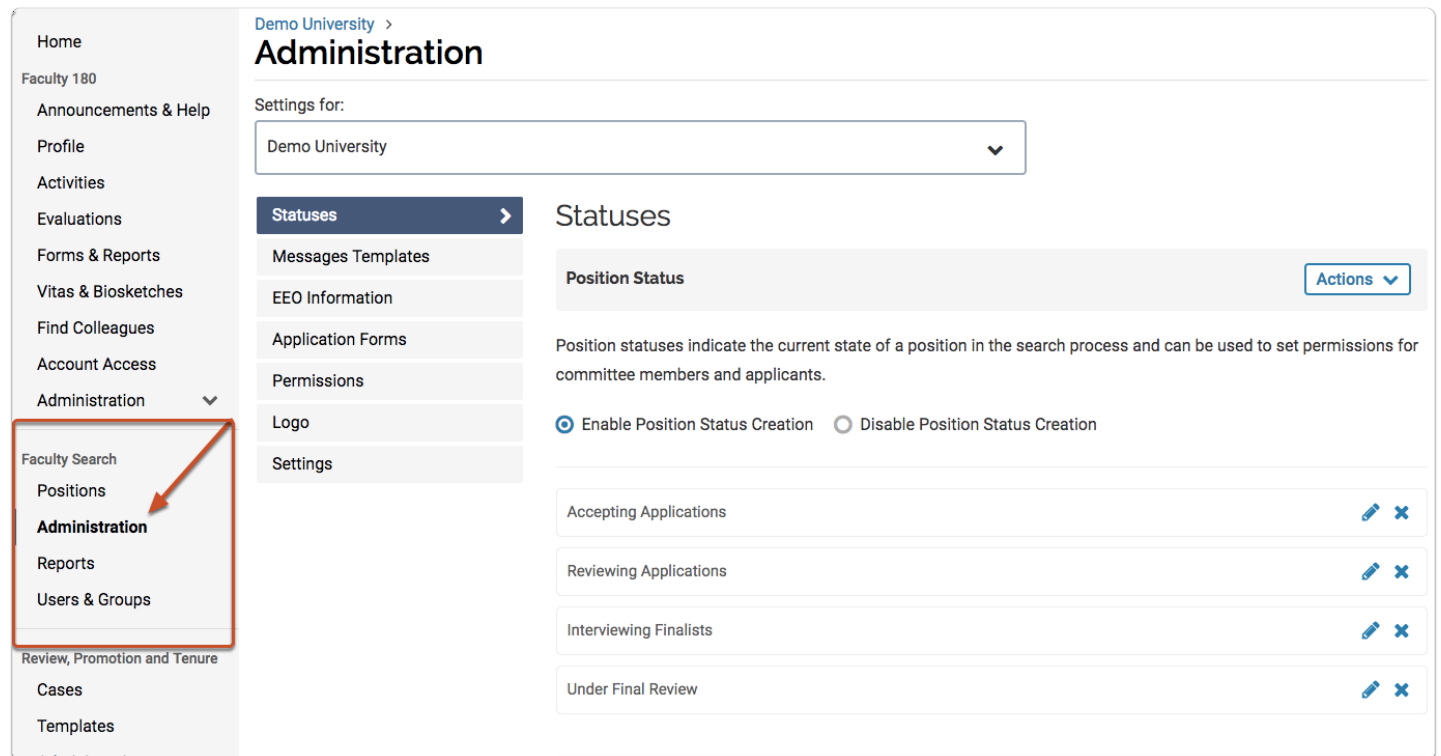
Depending on their administrative privileges, from the "Administration" page, users can:

- Create and edit position and application statuses
- Create message templates to send to applicants when the status of a position or application changes
- Create and manage EEO statements
- Create and manage application forms (including EEO forms)
- Set communication settings to enable or disable comments and tags

 The tabs that appear on the "Administration" page are determined by your level of access in the program. Not all tabs listed below will appear for all users.

To navigate to the Administration page:

Click "Manage" on you Faculty Search dashboard and select "Administration"



Always make sure you are viewing settings for the correct unit or position

The name of the unit or position you are viewing is displayed at the top left of the page.

! Any changes you make to the settings on the "Administration" page will be applied to the unit or position listed here.

Click the drop-down if you need to view and control settings for a different unit or position.

Home
Faculty 180
Announcements & Help
Profile
Activities
Evaluations
Forms & Reports
Vitas & Biosketches
Find Colleagues
Account Access
Administration

Demo University >
Administration

Settings for:
Demo University

Statuses

- Messages Templates
- EEO Information
- Application Forms
- Permissions
- Logo
- Settings

Statuses

Position Status Actions

Position statuses indicate the current state of a position in the search process and can be used to set permissions for committee members and applicants.

☒ Enable Position Status Creation ☐ Disable Position Status Creation

Accepting Applications	
Reviewing Applications	
Interviewing Finalists	
Under Final Review	

Statuses:

From the "Statuses" tab of the Administration page, you can create and manage:

1. **Position Statuses:** Labels that describe the current state of the selection process, for example, "Accepting Applications"
2. **Application Statuses:** Labels that describe the current state of the applicant in the review process, for example, "Longlist" or "No Further Consideration"

💡 See here for more information on how to [create a position status](#), and how to [create an application status](#).

Statuses

Messages Templates

EEO Information

Application Forms

Permissions

Logo

Settings









Statuses

Position Status

Actions

Position statuses indicate the current state of a position in the search process and can be used to set permissions for committee members and applicants.

☒ Enable Position Status Creation ☐ Disable Position Status Creation


Accepting Applications	 
Reviewing Applications	 
Interviewing Finalists	 
Under Final Review	 

Application Status

Actions

Message Templates:

From the "Message Templates" tab you can create and manage message templates to send customized messages to applicants when the status of a position or application changes. You can set the conditions when the message will be sent, and you can edit and confirm messages before sending them.

 See here for more information on [how to set up applicant notification message templates](#).

Demo University >

Administration

Settings for:

Demo University

Statutes

Messages Templates >

EEO Information

Application Forms

Permissions

Logo





Settings

Templates

+ Add


Customize messages to send to applicants when the status of a position or application changes. Templates can be used at this and any unit below. You will have the opportunity to edit and confirm messages before sending them.

Search by subject or unit name

Subject	Created at	Actions
Interview invitation	Demo University	 
Invitation for Interview	Department of Geriatric Nursing	 

EEO Statement:

From the "EEO Statement" tab, administrative users can create, edit, and set the EEO statement for positions created in a unit.

 See here for more information on [managing EEO statements](#).

Demo University >

Administration

Settings for:

Demo University ▼

- Statuses
- Messages Templates
- EEO Information** >
- Application Forms
- Permissions
- Logo
- Settings

EEO Information

EEO Statement Actions ▼

The EEO statement provides standard language about your institutions EEO policy and is used for positions created at your institution.

☒ Enable EEO statement changes ☐ Disable EEO statement changes

Current EEO Statement

Demo University shall abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

EEO Forms + Add

Application Forms:

From the "Application Forms" tab, Administrators can create application forms to collect information from applicants. Administrators can also create EEO forms and designate forms as default for a unit.

💡 See here for more information on [creating application forms](#), and [EEO forms](#).

Statuses

Messages Templates

EEO Information

Application Forms

Permissions

Logo

Settings

Application Forms

Application Forms

+ Add

Search by form or unit name

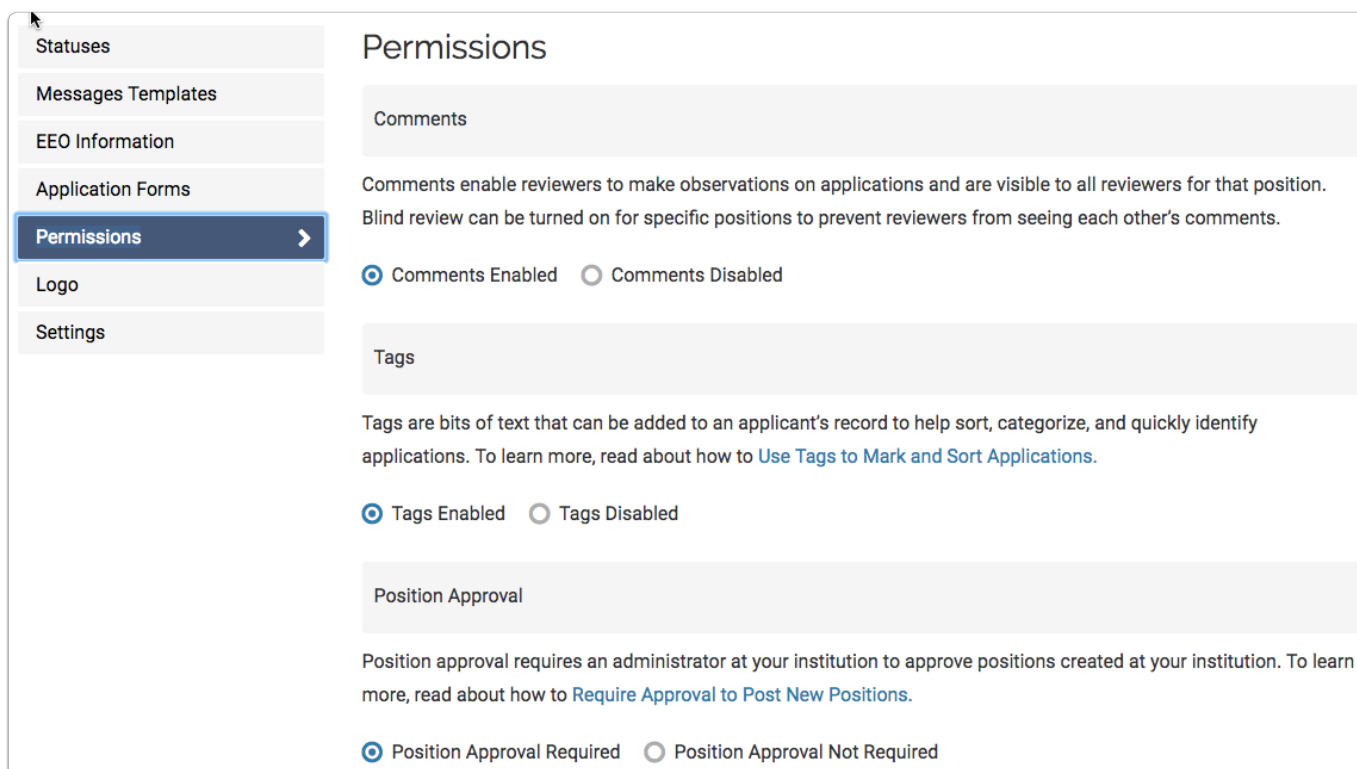
Q Search forms

Form Name ^	Created at ^		
Additional Information	Department of Geriatric Nursing	Required	<div><div></div><div></div></div>
Another test form	Demo University		<div><div></div><div></div></div>
EEO	College of Arts and Sciences	Required	<div><div></div><div></div></div>
Test	Demo University	Required	<div><div></div><div></div></div>

Permissions:

From the "Permission" tab, Administrators can set whether or not reviewers can comment and assign tags to applications. Administrators can require approval for new positions, set who to notify when a position changes, and set the sender name and "reply-to" address for email messages.

See here for more information on [requiring approval to post new positions.](#)



Permissions

Comments

Comments enable reviewers to make observations on applications and are visible to all reviewers for that position. Blind review can be turned on for specific positions to prevent reviewers from seeing each other's comments.

☒ Comments Enabled ☐ Comments Disabled

Tags

Tags are bits of text that can be added to an applicant's record to help sort, categorize, and quickly identify applications. To learn more, read about how to [Use Tags to Mark and Sort Applications](#).

☒ Tags Enabled ☐ Tags Disabled

Position Approval

Position approval requires an administrator at your institution to approve positions created at your institution. To learn more, read about how to [Require Approval to Post New Positions](#).

☒ Position Approval Required ☐ Position Approval Not Required

Logo:

From the "Logo" tab, administrative users can upload and change the logo that will display on positions created by a unit or set the logo for a particular position.

 See here for more information on [add a logo to the landing page of a position](#).

Demo University >

Administration

Settings for:

Demo University

Statuses

Messages Templates

EEO Information

Application Forms

Permissions

Logo


Settings

Logo

Logo

Change

This logo will be displayed on any position published by this unit. For best results, use a logo with a white or transparent background, maximum file size of 20KB, and in one of the following formats: PNG, JPEG, JPG or GIF.



Settings

The Settings page allows an institution to create and use a public positions list.

Statuses

Messages Templates

EEO Information

Application Forms

Permissions

Logo

Settings

Settings

Public Position List

Interfolio provides a public link to a list of all the published positions available at your institution. You can use this link to advertise the positions available on your institutional website or other places where you provide a list of available positions.

List Name

Demo University Open Positions

Edit

URL

<https://apply-alpha.interfolio.com/10207/positions>

Copy URL

Equal Employment Opportunity Statement

This page displays the EEO statement for your institution.
[Manage EEO Statement](#)

Demo University shall abide by the requirements of 41 CFR §§ 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

Communication in Interfolio Faculty Search

Interfolio Faculty Search includes numerous methods for users to communicate with each other. Administrators and Committee Managers have the ability to email applicants individually or in groups, as well as create automated email notifications (which can trigger automated letters of rejection, for instance).

Comments and "Tags" are tools that help Evaluators and Committee Managers communicate with one another about specific candidates, and are also used to organize and sort applications.

Administrators and Committee Managers [can enable or disable comments and labels](#) from the Administration page.

Email

Committee Managers and Administrators can [email applicants](#) individually or in groups, as well as [create automated email notifications](#) in Interfolio Faculty Search.


Comments

- Comments appear on the Applicant Profile page and in the Document Viewer
- If permissions allow, Evaluators can both [leave comments on an application](#), and view previously entered comments
- [Establishing a "blind review"](#) prevents Evaluators from viewing one another's comments

Tags

If allowed, Evaluators can add tags to an applicant record. These are custom tags to help sort, categorize, and quickly identify applications. Tags are useful, for example, for quickly noting qualifications ("PhD", "Wrong Degree") or noting when they have been reviewed by an Evaluator ("Reviewed by Mark").

Tags are also useful for sorting purposes. For example, if a Committee Manager uses a tag to assign each applicant to an Evaluator, then Evaluators can filter by their label and view only those applications they are assigned to review.

 Keep in mind that tags are viewable by anyone that has access to the search at your institution. We strongly recommend that Administrators discuss a standard nomenclature to use for labels before beginning the process of evaluation.

Blind Review

When setting up or editing a position, Administrators or Committee Managers can elect to use a blind review policy. With a blind review, Evaluators cannot see one another's comments and ratings. You can, however, start with a blind review, and then un-toggle the feature later for group discussion/collaboration. For more information see this article: [Establish Custom Ratings Criteria and/or Set Up a Blind Review.](#)

Notifications

Users will receive alerts and notifications when certain actions need to be completed. [Here is more information on the To-Dos.](#)

Position and Application Statuses

Position and Application Statuses are tags you can use to mark the stages of a search and track the progression of an applicant. Statuses are useful for sorting positions or applications, and can be a very effective tool for managing search processes that involve several steps.

Statuses in Interfolio Faculty Search can also be tied to settings in the product that control the levels of access Evaluators and applicants have to materials. For example, depending on your settings, statuses can be used to determine when applicants can submit materials or when Evaluators can review applications.

Position Statuses

Position statuses indicate where a position is within the search process. Some common position statuses are "Accepting Applications," and "Reviewing Applications." These statuses are useful for viewing or sorting a list of open positions.

In addition, each position status can carry its own set of rules that impact permissions in the program. When creating a position status, you have the option of choosing whether:

1. Evaluators can review applications while this status is active
2. Applicants can update their application materials while this status is active
3. Applicants can see this status when it is active.

So, for example, when changing a status from "Accepting Applications" to "Reviewing Applications," you can set the program so that Evaluators can review application materials, but applicants can no longer submit or update application materials.

Application Statuses

Application statuses are applied to individual applicants to indicate where their application is within the search process; for instance, you might use "Rejected," "Longlist," or "Shortlist" as possible application statuses. This feature is particularly useful for sorting applicants and controlling when subsets of applicants can and cannot update their applications.

When creating an application status, you can control whether:

1. Applicants can update their application materials while this status is active.
2. Applicants can see this status.

If a search process requires applicants to add additional documents at a later time, application statuses are the best way to accomplish that process. For instance, you might want to see

another letter of recommendation just from the top candidates halfway through your search. By creating a "Shortlist" application status, you can allow just those applicants to submit more materials. Application statuses are also beneficial because they help organize and narrow down large lists of applicants.

Useful Articles for Getting Started

[Create a Position Status](#)

[Assign or Change a Position Status](#)

[Create an Application Status](#)

[Assign or Change an Application Status](#)

Custom Application Forms

A standard faculty search will collect personal information from applicants, such as names, emails, and contact information, along with typical documents such as cover letters, C.V.s, and letters of recommendation. If you need to collect additional information specific to your institution or individual search, you can create a custom application form that will appear as a requirement in your institution's online application.

For example, some institutions like to collect information about their advertisements with a form asking "Where did you hear about this position?" Other institutions might require forms that allow candidates to specify their strengths or preferences that apply specifically to the position.

All administrators and committee managers can create forms. Forms can be specific to the institution, college, department or position. Once a form has been created at a specific tier, any position that falls under that tier will have access to the form in Step 4 of the position creation process, or when editing a position.

Note that creating forms and adding them to your application are two separate processes. Forms are created from the Administration page, but are added to your online application requirements either at Step 4 of creating a position, or from the Edit Position screen.

Faculty Search's form editor can also be used to collect Equal Employment Opportunity data, and comes pre-loaded with a VEVRAA/503-compliant Standard EEO form. EEO forms can be required by institutional or unit administrators. If a form is marked as an EEO form, only EEO officers and Administrators with EEO access may view the data it collects. Responses are not available to committee members without EEO access.

Useful Articles for Getting Started

[Create a Custom Form to Collect Applicant Information](#)

[Create an EEO Form](#)

[Customizing the Standard VEVRAA/503-compliant EEO Form](#)

Reporting In Faculty Search

Interfolio Faculty Search includes many options for finding and documenting information about applicants and the results and details of searches and decisions at your institution. Reporting includes four main areas: system logs, application reports, EEO/custom form reports, and position reports. Every report can be displayed online or downloaded as a .CSV file.

System Logs

System logs allow you to track changes and updates in your institution's use of Interfolio, including:

- Changes made to questions or descriptions included in application forms
- All outbound messages sent to your applications in a specific position
- Changes to assigned application and position statuses
- Changes to information about the position, including the position description, start/end date, auto-acknowledgment email, and application instructions

Applications Report

[Applications Reports](#) are created by applying a customizable set of filters to sort applications along many possible data points. Users can pick and choose from an extensive list of applicant data fields to create a customized report, which can be viewed onscreen, saved and recalled, and downloaded as a CSV file. This allows Administrators to run detailed and customized reports on the data involved in faculty hiring across an institution.

Forms Report

An [EEO and custom forms report](#) pulls data from a form that was included as a requirement with a position. With a forms report, whatever question that you have posed to an applicant during the hiring process can turn into reportable data. Information from this report can be presented in raw data format, showing individual responses, or in a response summary, showing totals and percentages.

Positions Report

The Positions Report tool allows administrators to generate a table of information about positions (searches) created by one or more units, such as a school or department, based on

one or more criteria such as the results of a search (hires made, or notes indicating why a hire was not made etc.) position details, dates, description, application requirements, evaluation (criteria and labels), search committee members, and internal notes (such as Funding Sources, Salary Range etc.).

More Useful Articles for Getting Started with Reports

[View System Logs](#)

[View Report of Emails and Notifications](#)

[Run an EEO or Custom Form Report](#)

[Run a Combined Report](#)

[Close a Position and Indicate the Outcome of a Search](#)

[Run a Report on the Results of an Interfolio Faculty Search](#)

Closing Positions

Committee Managers and Administrators can close a position when applications are no longer being considered, either because a hire has been made or for some other reason.

When closing a position, Committee Managers or Administrators can indicate which applicants were selected to fill the position, and if no applicants were selected, can leave an optional note to document why no selection was made. The user is also asked to set a final closed status for the position and has the option to send a message to all applicants based on the status they have chosen.

In addition, Administrators can run reports that clearly document who was hired for every search in the system. For more information see this article on [how to run a report on hired applicants](#).

Guides for Faculty Search Job Applicants and Evaluators

Committee Manager's Guide to Interfolio Faculty Search

Welcome to Faculty Search! Faculty Search allows you to both collect applicant materials and make collaborative, committee-based decisions with your colleagues, all in one secure and easy location. You can easily adapt your existing hiring process into Faculty Search to make the experience more efficient and paperless for yourself, your colleagues, and your applicants.

As a Committee Manager, you have many more responsibilities and privileges in the product than the average committee member; at the same time, you are slightly limited within your organization when it comes to certain aspects of the product, such as creating institutional settings. The following articles will assist you in your role by showing how you cover every step of your workflow in , from creating a search committee, to creating and managing a new position, and communicating with your applicants. And remember: every action within Faculty Search is documented with a step-by-step guide in our [online help center](#).

Click here to download and print a PDF of the complete [Committee Manager's Guide to Faculty Search](#).

Useful Articles for Getting Started

Basics

[Users in Faculty Search](#)

[Your Faculty Search Account Dashboard](#)

Creating a Search Committee

[Add or Remove Members to/from a Search Committee](#)

[Add Users](#)

[Change a User's Role](#)

Creating Positions

[Create a Position](#)

[Establish Ratings Criteria](#)

[Submit a New Position for Approval](#)

[Approve a Position or Send It Back for Changes](#)

Managing Positions

[Best Practices for Managing a Search](#)

[Edit an Existing Position](#)

[Enable or Disable Reviewer Comments and Labels](#)

[Close a Position and Indicate the Outcome of a Search](#)

[View Referral Sources to See Where People are Finding Your Position](#)

Statuses

[Position and Application Statuses](#)

[Create a Position Status](#)

[Create an Application Status](#)

Managing Applications

[Add Documents on Behalf of an Applicant](#)

[Request a Letter of Recommendation on Behalf of an Applicant](#)

[Create an Application on Behalf of an Applicant](#)

Communicating

[Email Applicants](#)

[Set Up Automated Email Notifications](#)

Job Applicant's Guide to Interfolio Faculty Search


When you apply to an Interfolio-hosted position, you will be given a free Interfolio Dossier account that you can use to collect and submit your materials, including confidential letters of recommendation, all for free. Using our convenient, easy to understand online application process, you can fulfill specific requirements set by the institution, complete any forms they have requested, and review your completed application at any time.

When you've completed applying for your Interfolio-hosted position, you'll still have your free Dossier account for collecting and storing materials. You can also [search for more opportunities from directly within our program.](#)

Applying and sending materials to Interfolio-hosted positions is always free, but we encourage you to consider signing up for our premium service, Dossier Deliver, so you can send the materials in your Dossier wherever you need them to go! Click here to [learn more about the advantages of Dossier Deliver.](#)

Click "Apply Now" on a position announcement

If an institution is using Faculty Search to run a search, you will be able to apply online just by clicking the "Apply Now" button in the position announcement.


Scott Harris

Assistant Professor of Landscape Architecture

Demo University: Department of Architectural History

Location	Open Date	Deadline
Washington, D.C.	Sep 1, 2015	Aug 16, 2018 at 11:59 PM Eastern Time

Description
 The Department of Landscape Architecture at the College of Interfolio seeks an individual to fill a vacancy at the fulltime academic (9.5 month), tenure-track level. Appointment will be at the rank of Assistant Professor; the position will commence in August 2015. The Department consists of graduate programs in landscape architecture, city planning, as well as architecture and works collaboratively with students to tie the existing urban environment to the everexpanding definition of landscape architecture.


Application Instructions
 Applications will only be accepted through Interfolio. An Interfolio account will automatically be created for you. Please be sure all information is entered completely and accurately (especially names and email addresses). All uploaded files must be in Adobe PDF format. Files in another electronic format (e.g., MS Word) should be saved or "printed to" PDF format before uploading.

Qualifications
 Master of Landscape Architecture degree or Bachelor of Landscape Architecture with a terminal

The institution is here.

Application Process
 This institution is using Interfolio's Faculty Search to conduct this search. Applicants to this position receive a free Dossier account and can send all application materials, including confidential letters of recommendation, free of charge.

[Apply Now](#)

Powered by  interfolio

Sign in if you already have an account with us, or click to "create an account"



Note that you can sign in with your institutional ID if you have a Dossier account through your institution, or sign in using your Google account.

Sign In

Sign in with email

Email *

Password *

Sign In

[Forgot your password?](#)

Or sign in with:

Partner Institution

Google

Don't have an account?
 Use Interfolio's suite of services to simplify your academic life.
[Create an account](#)

If you need to create an account:

- Fill out the account info, create a password, agree to our terms of service and click "Sign Up."

Get Started With Dossier

Your online Dossier awaits.

You're on your way to a more organized academic life. With Dossier, you'll be able to request, store, and organize your most important scholarly documents.

- ✓ Upload CVs, teaching statements, syllabi, and more.
- ✓ Request and store confidential letters.
- ✓ Curate materials into themed collections.

First Name *

Last Name *

Email *

 or [Sign up with Google](#)

Password *

 ☐ Show Password

How did you hear about us? *

☒ Keep me updated about products, news, and best practices.

☐ I agree to Interfolio's [Terms of Service](#)

Sign Up

Want to deliver your materials? [Sign up for Dossier Deliver](#)

Complete your profile in order to start your application

Complete your profile to get started. We will provide this information to the institution to which you are applying.

Complete Profile

To start your application for this position, please complete your profile below. This information will be provided to institutions that you apply to.

First Name *

Boyd

Last Name *

Reese

Address Line 1 *

Enter Street Address

Address Line 2

Enter Apartment Number, Floor, Suite

City *

Enter city

State

Zip/Postal Code *


Enter Zip

Country *

Select your country

Save & Continue >

Cancel



Applying to an Interfolio-hosted position is a guided step-by-step process. An overview of the application steps are listed to the right of the screen.

Steps that still need completion will be marked by a red exclamation point.







Associate Professor of Orthodontic Dentistry

Demo University, College of Dentistry

Position Details

5 Documents Required | 0 Added

If this application has specific document requirements, they will be listed below—simply click "Add File" to upload a new document or to select one from your Dossier.

 Cover Letter	1 Required 0 Added	 Add File
 C.V.	1 Required 0 Added	 Add File
 Confidential Letter of Recommendation or Evaluation	3 Required 0 Added	 Add File

Please submit three confidential letters of recommendation from individuals familiar with your scholarly work.

Application Steps

1 Documents

2 Personal Information

3 Forms

4 Review

Return To Review

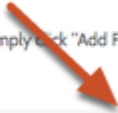
Upload required materials to the application

- ❗ You will see a list of required materials along with the number required.
- You will need to satisfy all document requirements before submitting your application.

5 Documents Required | 0 Added

If this application has specific document requirements, they will be listed below—simply click "Add File" to upload a new document or to select one from your Dossier.

📌 Confidential Letter of Recommendation or Evaluation	3 Required 0 Added	+ Add File
📌 Cover Letter	1 Required 0 Added	+ Add File
📌 C.V.	1 Required 0 Added	+ Add File




Click "Add File" to add required materials

5 Documents Required | 0 Added

If this application has specific document requirements, they will be listed below—simply click "Add File" to upload a new document or to select one from your Dossier.

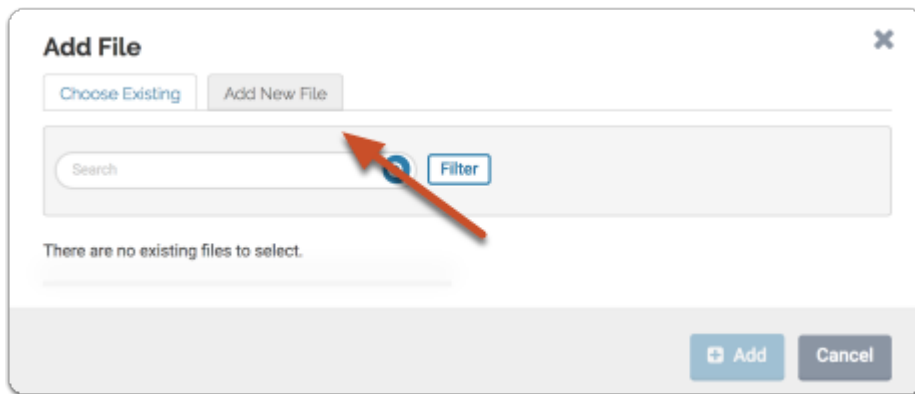
📌 Cover Letter	1 Required 0 Added	+ Add File
----------------	----------------------	----------------------------



Open the "Add New File" tab to upload materials from your computer to the application

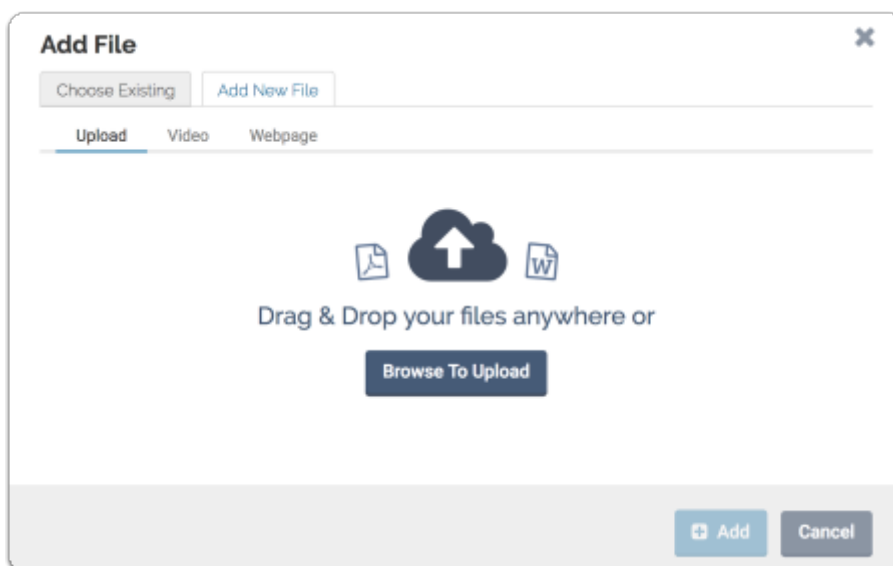
You can add files from a few different sources, but if this is your first time using Interfolio's Dossier to apply for a position, open the "Add New File" tab to begin adding materials to the application.

💡 All materials you add here will automatically appear in your Dossier account where you can use them for other purposes such as future reviews or applying for other opportunities.



From here, you can drag & drop, or browse for files to upload. You can also add links to videos and webpages if necessary.

See here for more information on how to [link to webpages in your Dossier](#) and how to [add Youtube and Vimeo videos to your Dossier](#).



Once you have selected a file to upload, select the type of materials you are uploading from the dropdown menu

"Type" describes the material and indicates which requirement it satisfies such as; C.V., cover letter, research statement, etc.

Add File ✕

Choose Existing [Add New File](#)

Upload Video Webpage

Thank You! Your files are uploading now. Please select the type of material you are uploading. You also have the option to edit the title of the file.

CV Select Type ✕

+ Add Cancel

Click to "Add"

Add File ✕

Choose Existing [Add New File](#)

Upload Video Webpage

Thank You! Your files are uploading now. Please select the type of material you are uploading. You also have the option to edit the title of the file.

CV C.V. ✕

+ Add Cancel

A green check mark indicates when you have satisfied a requirement

5 Documents Required | 1 Added

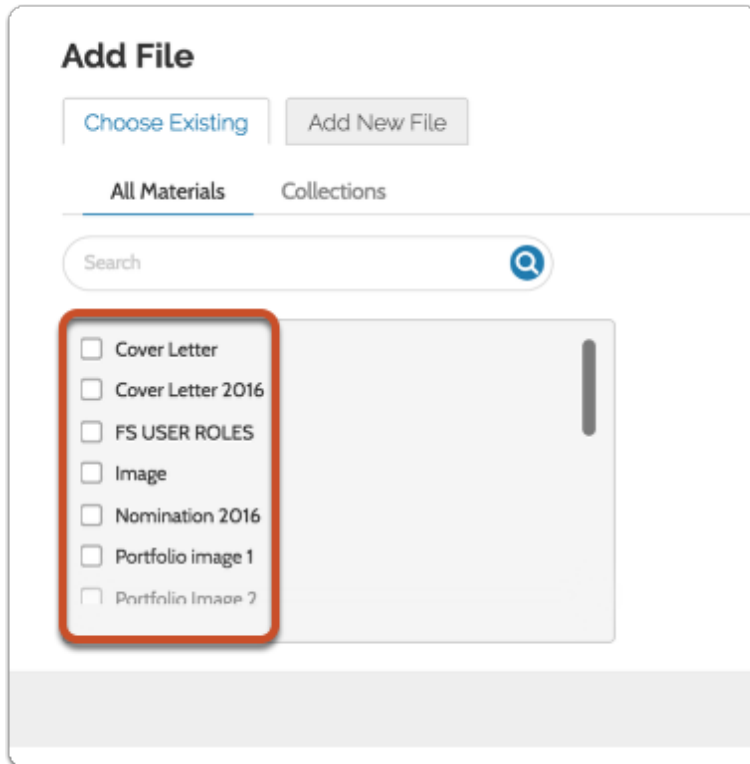
If this application has specific document requirements, they will be listed below—simply click "Add File" to upload a new document or to select one from your Dossier.

✓ **Cover Letter** 1 Required | 1 Added + [Add File](#)

📄 CV Received Oct 15, 2017 at 4:23 PM 🗑️ ✎️

You can also add files that you've previously uploaded to your Dossier:

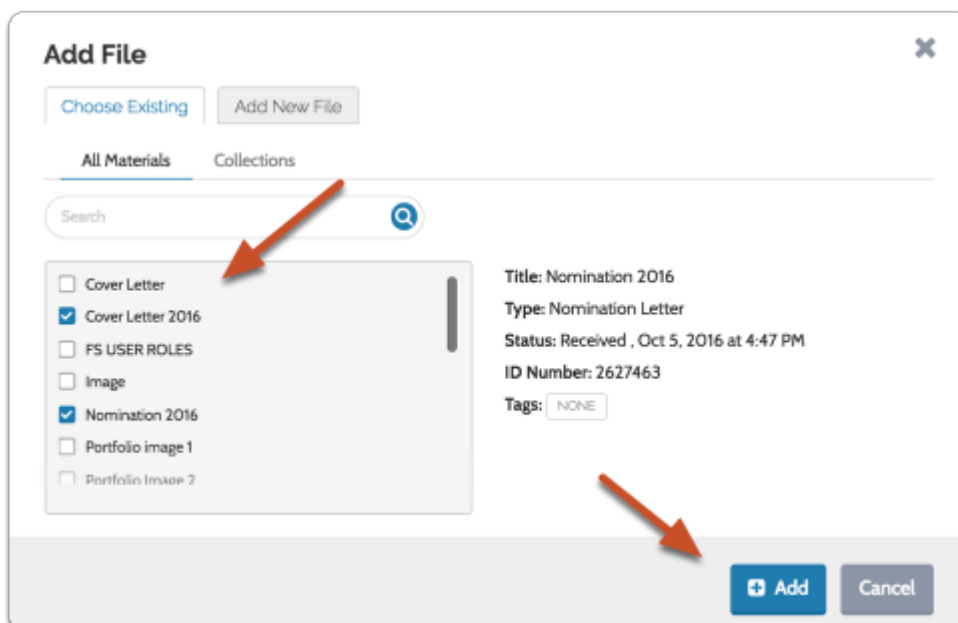
If you have already uploaded materials to your Dossier account they will show up in the dropdown list on the tab labeled "Choose Existing."



The screenshot shows the 'Add File' dialog box with the 'Choose Existing' tab selected. Below the 'All Materials' and 'Collections' tabs is a search bar. A list of existing materials is displayed, with a red box highlighting the list items:

- ☐ Cover Letter
- ☐ Cover Letter 2016
- ☐ FS USER ROLES
- ☐ Image
- ☐ Nomination 2016
- ☐ Portfolio image 1
- ☐ Portfolio image 2

Select all the materials to include and click "Add"



The screenshot shows the 'Add File' dialog box with the 'Choose Existing' tab selected. Two red arrows indicate the next steps: one points to the 'Cover Letter 2016' and 'Nomination 2016' items in the list, which are now checked, and the other points to the 'Add' button at the bottom right.

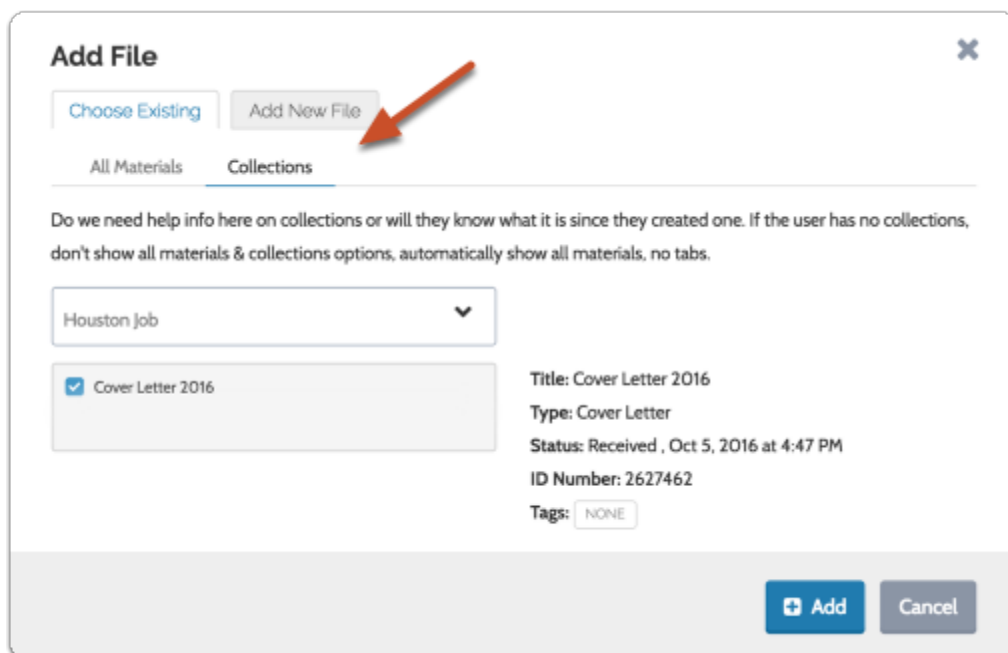
Selected items in the list:

- ☒ Cover Letter 2016
- ☒ Nomination 2016

Details on the right:

Title: Nomination 2016
Type: Nomination Letter
Status: Received , Oct 5, 2016 at 4:47 PM
ID Number: 2627463
Tags: NONE

-or- click "Collections" to open a tab where you can select materials from your saved collections



Add File

[Choose Existing](#) [Add New File](#)

All Materials **Collections**

Do we need help info here on collections or will they know what it is since they created one. If the user has no collections, don't show all materials & collections options, automatically show all materials, no tabs.

Houston Job

☒ Cover Letter 2016

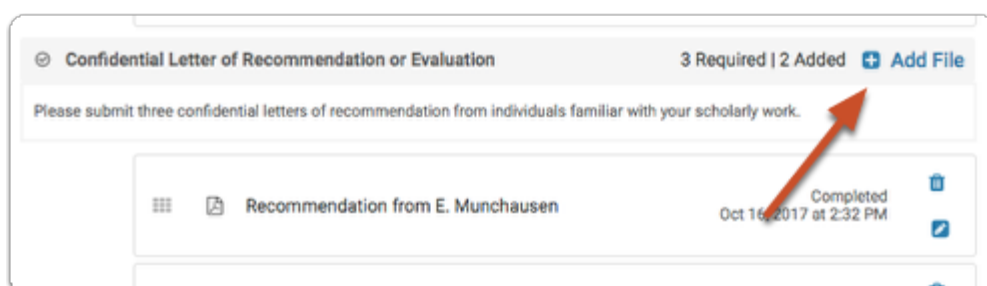
Title: Cover Letter 2016
Type: Cover Letter
Status: Received , Oct 5, 2016 at 4:47 PM
ID Number: 2627462
Tags: NONE

[+ Add](#) [Cancel](#)

Use Dossier to request and add confidential letters of recommendation:

If your application requires a confidential letter of recommendation, you can request that letter through Dossier. We will automatically attach the letter of recommendation to your application when we receive it from your letter writer.

Click "Add File" under the requirement for confidential letters of recommendation



Confidential Letter of Recommendation or Evaluation 3 Required | 2 Added [+ Add File](#)

Please submit three confidential letters of recommendation from individuals familiar with your scholarly work.

Recommendation from E. Munchausen Completed Oct 16, 2017 at 2:32 PM

You can choose to use a letter you already have in your Dossier, or request a new recommendation

Add File ✕

[Choose Existing](#) [Request a Recommendation](#)

[All Materials](#) [Collections](#)

Search 🔍 [Filter](#)

☐ All

☐ Recommendation from E. Grangerford for Associate Professor of Orthodontic Dentistry

☐ Recommendation from E. Munchausen

☐ Recommendation from F. Doolittle

Title: Recommendation from E. Grangerford for Associate Professor of Orthodontic Dentistry

Type: Confidential Letter of Recommendation or Evaluation

Status: Requested , Oct 17, 2017 at 2:30 PM

ID Number: DA1D9C1E4D

Tags: [None](#)

[+ Add](#) [Cancel](#)

Note that you can filter the list by keyword to quickly find particular letters. Simply enter your keywords and select "Filter."

Add File ✕

[Choose Existing](#) [Request a Recommendation](#)

[All Materials](#) [Collections](#)

doolittle 🔍 [Filter](#)

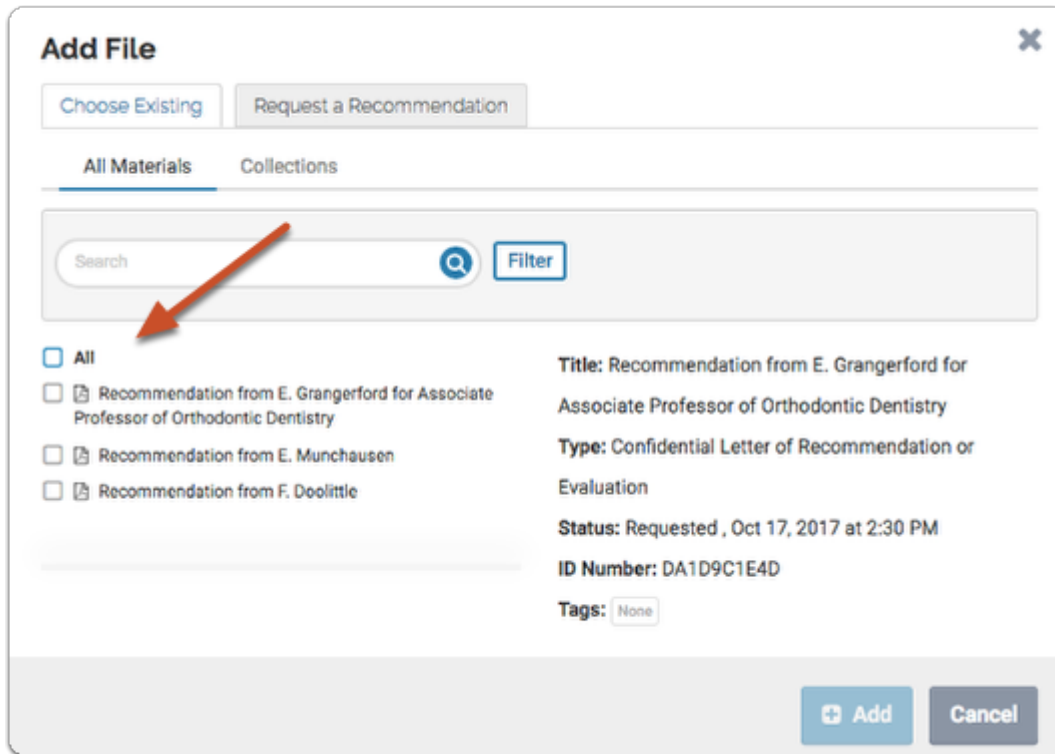
Results with: **Keywords** [Clear All](#)

☐ All

☐ Recommendation from F. Doolittle

[+ Add](#) [Cancel](#)

To use existing recommendations" Select "All" to add all letters of recommendation in your account to the application, or select the individual letters you want to include, and click "Add"



Add File [Close]

Choose Existing | Request a Recommendation

All Materials | Collections

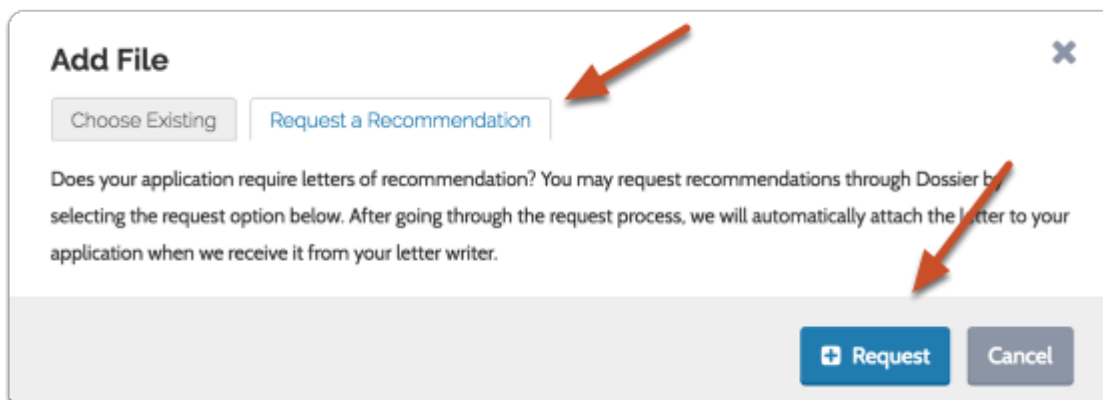
Search [Search Icon] Filter

☒ All
☐ Recommendation from E. Grangerford for Associate Professor of Orthodontic Dentistry
☐ Recommendation from E. Munchausen
☐ Recommendation from F. Doolittle

Title: Recommendation from E. Grangerford for Associate Professor of Orthodontic Dentistry
Type: Confidential Letter of Recommendation or Evaluation
Status: Requested , Oct 17, 2017 at 2:30 PM
ID Number: DA1D9C1E4D
Tags: None

[Add] [Cancel]

To request a new recommendation, open the "Request a Recommendation" tab, and click the "Request" button to begin the process




Add File [Close]

Choose Existing | Request a Recommendation

Does your application require letters of recommendation? You may request recommendations through Dossier by selecting the request option below. After going through the request process, we will automatically attach the letter to your application when we receive it from your letter writer.

[Request] [Cancel]

Fill out the recommendation request form and hit the "Send Request" button

 See the following article for more detailed information on [requesting a recommendation through Interfolio](#).

New Recommendation Request

from Samantha Reeves

General Information

Please include the name and email address of your recommender so we can verify the document when it is received.

Recommender Title

Prof. ▾

Recommender First Name *

Randall

Recommender Last Name *

Quinn

Recommender Email Address *

rquinn@demo.edu

Document Title *

Recommendation from R. Quinn for Associate Professor of Orthodontic Dentistry

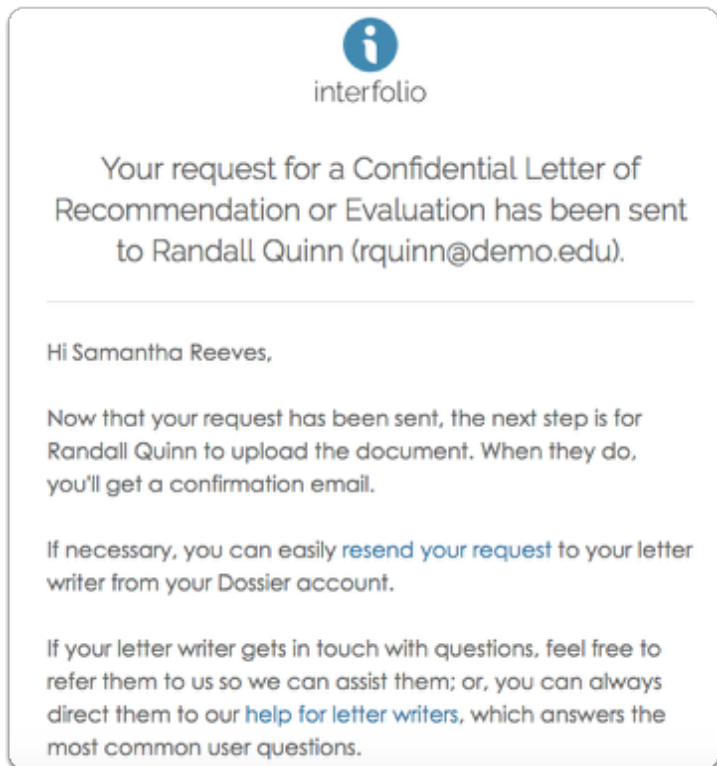
Confidentiality ⓘ

☒ This request is for a confidential letter or evaluation.


Request Method

☒ Email ☐ Print Request Form

You will receive an email notification that your letter request has been sent.

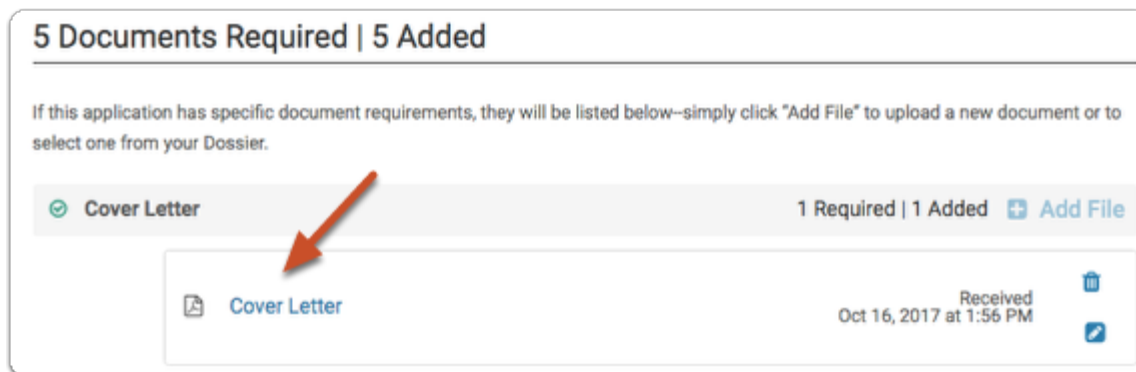


When we receive the recommendation from your letter writer, we will automatically attach it to the application, and add the letter to your Dossier materials

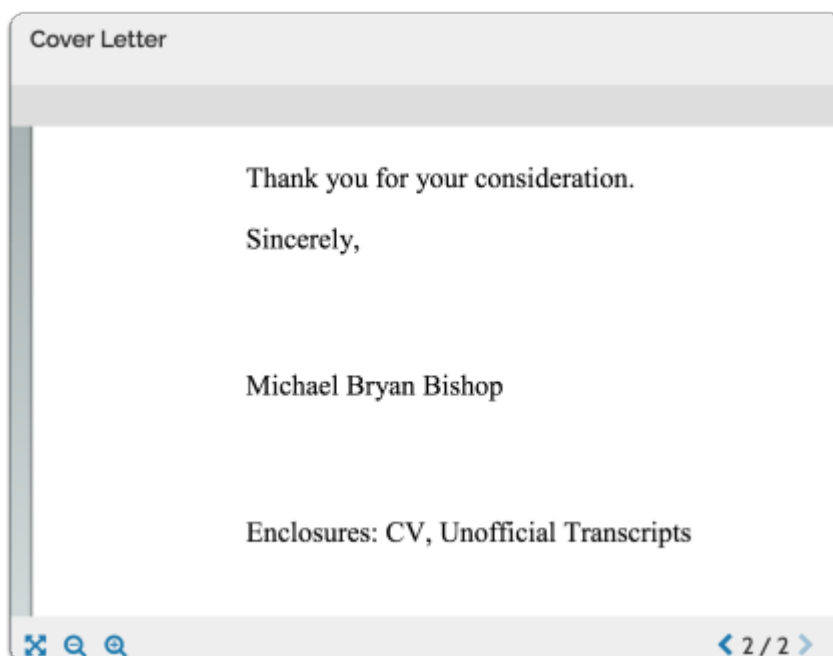
-  Your request will appear with the status "Requested" until the letter writer accepts or denies the request. If they accept, the status will be listed as "Pending" until we receive the letter. Note that to complete the requirement, you only need to have requested the letter. The requirement is considered complete when all required letters have been requested and have a status of added.

As you add required materials, you can preview how they will appear to the recipient or reviewer

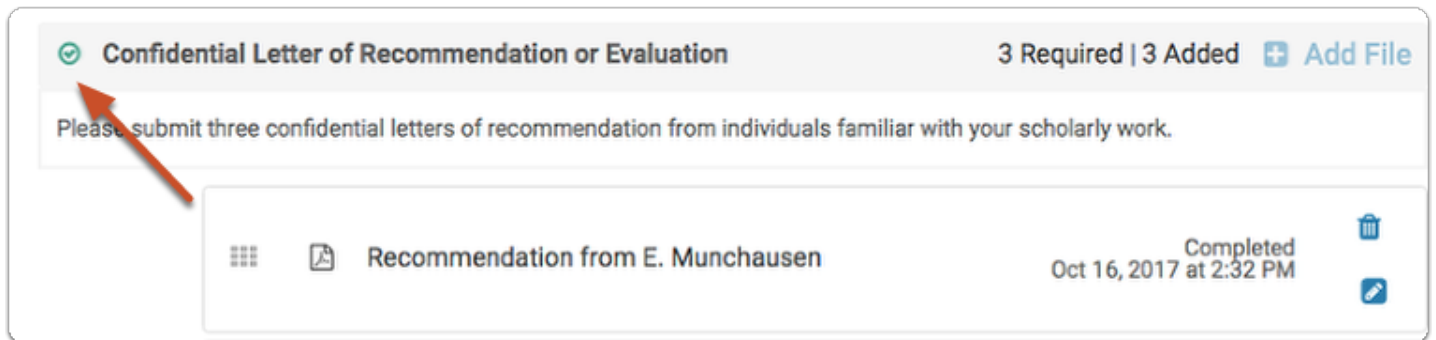
After uploading a document or other material, and once the material is marked "Received," click the name of the document to preview how it will appear to the recipient reviewing your application



This opens a preview of the file



When enough documents have been added to satisfy a requirement, a green check will display for the entire section



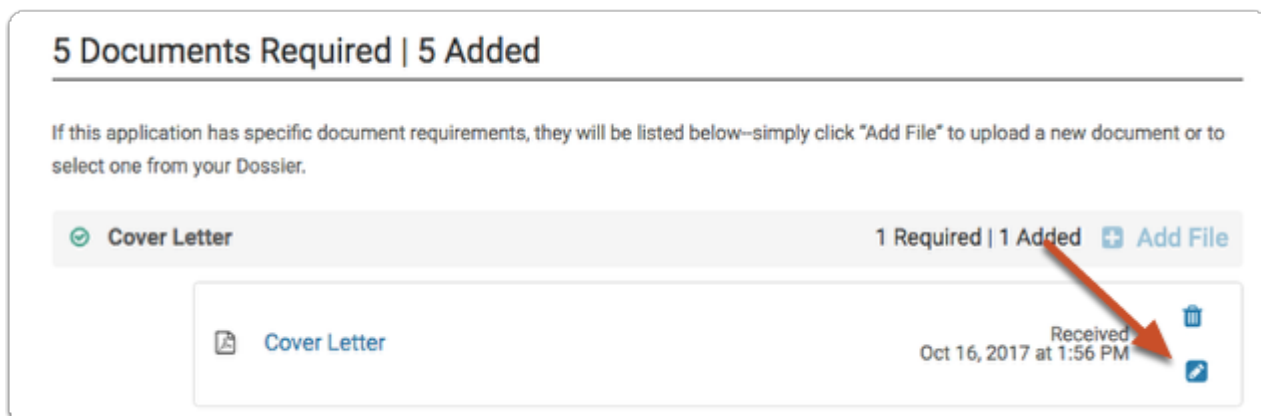
Confidential Letter of Recommendation or Evaluation 3 Required | 3 Added + Add File

Please submit three confidential letters of recommendation from individuals familiar with your scholarly work.

Recommendation from E. Munchausen Completed Oct 16, 2017 at 2:32 PM

This screenshot shows a section header 'Confidential Letter of Recommendation or Evaluation' with a green checkmark icon on the left and '3 Required | 3 Added + Add File' on the right. Below the header is a instruction: 'Please submit three confidential letters of recommendation from individuals familiar with your scholarly work.' Underneath is a list of documents. The first document is 'Recommendation from E. Munchausen' with a document icon on the left, the name in the center, and 'Completed Oct 16, 2017 at 2:32 PM' on the right. To the right of the date are two icons: a trash can and a pencil. A red arrow points from the green checkmark to the instruction text.

If you need to edit, delete, or replace an uploaded document, you can do so from the documents page of the application. Click the edit pencil



5 Documents Required | 5 Added

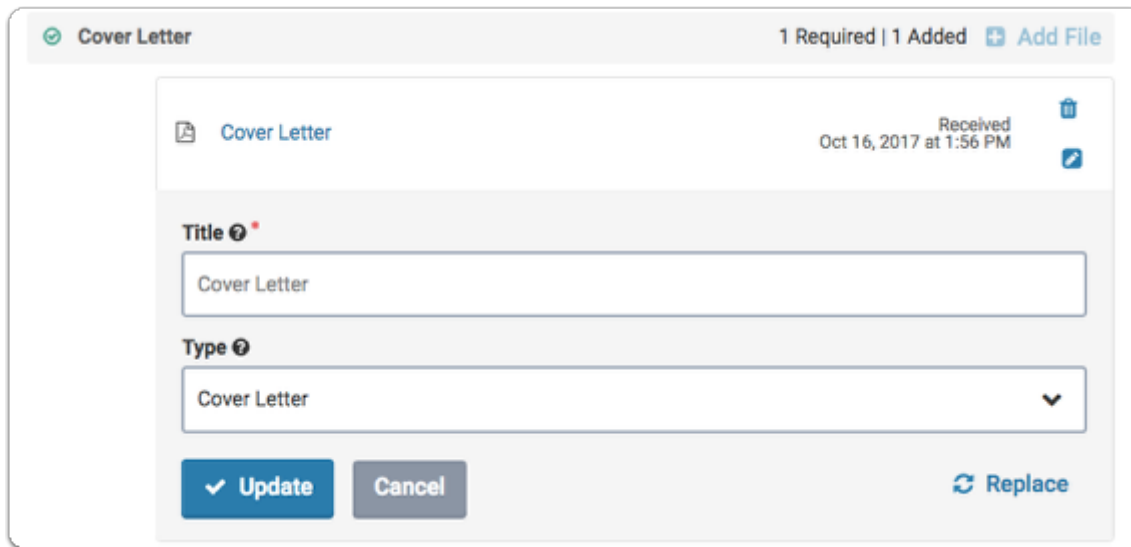
If this application has specific document requirements, they will be listed below--simply click "Add File" to upload a new document or to select one from your Dossier.

Cover Letter 1 Required | 1 Added + Add File

Cover Letter Received Oct 16, 2017 at 1:56 PM

This screenshot shows a section header '5 Documents Required | 5 Added'. Below it is a instruction: 'If this application has specific document requirements, they will be listed below--simply click "Add File" to upload a new document or to select one from your Dossier.' Underneath is a section header 'Cover Letter' with a green checkmark icon on the left and '1 Required | 1 Added + Add File' on the right. Below the header is a list of documents. The first document is 'Cover Letter' with a document icon on the left, the name in the center, and 'Received Oct 16, 2017 at 1:56 PM' on the right. To the right of the date are two icons: a trash can and a pencil. A red arrow points from the 'Add File' link to the trash can icon.

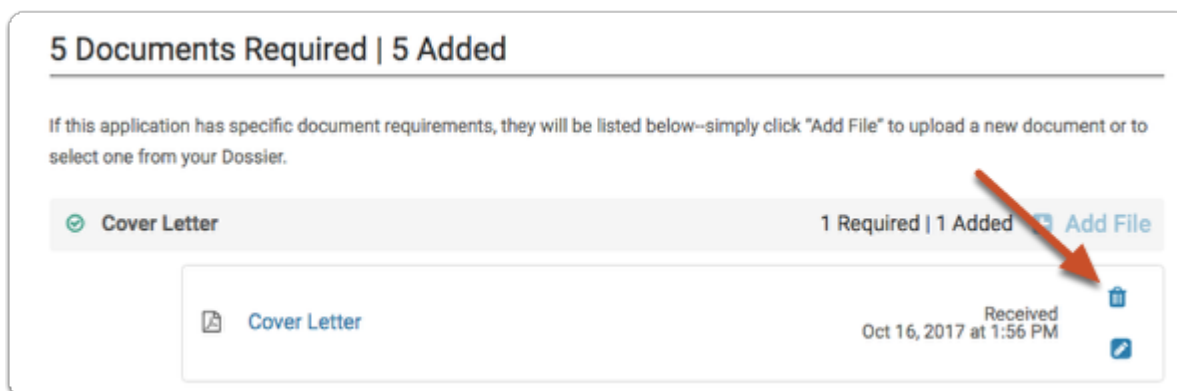
This will allow you to change the title and type of the document, or to replace it with a new document



The screenshot shows a document management interface for a 'Cover Letter'. At the top, it says '1 Required | 1 Added' and has an 'Add File' button. Below this, the document is listed with a trash icon and a 'Received' timestamp of 'Oct 16, 2017 at 1:56 PM'. The edit form contains a 'Title' field with the text 'Cover Letter' and a 'Type' dropdown menu also set to 'Cover Letter'. At the bottom, there are three buttons: 'Update' (with a checkmark), 'Cancel', and 'Replace' (with a circular arrow icon).

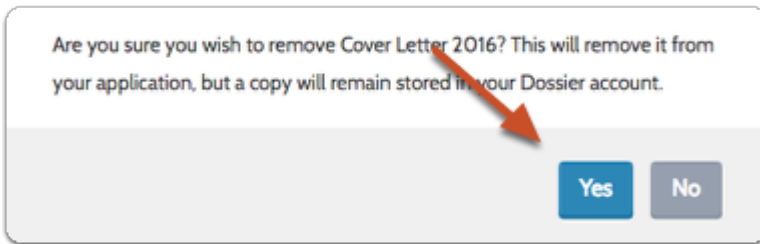
Click the trash icon to delete a document from the application

i When deleted from here, the document will be removed from the application ONLY. A copy will remain stored in your Dossier account.

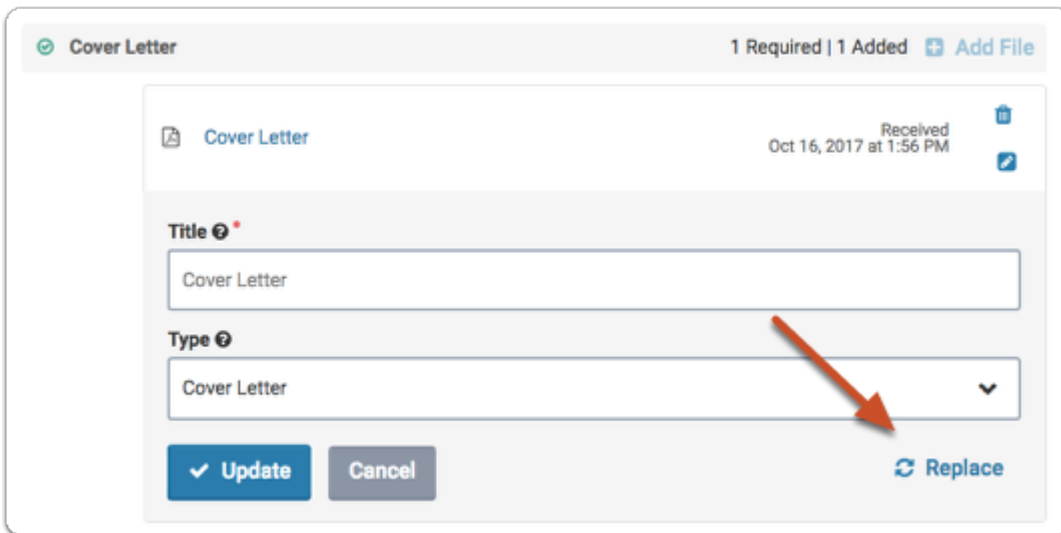


This screenshot shows a document list under the heading '5 Documents Required | 5 Added'. A message states: 'If this application has specific document requirements, they will be listed below--simply click "Add File" to upload a new document or to select one from your Dossier.' Below the message is a document entry for 'Cover Letter' with a 'Received' timestamp of 'Oct 16, 2017 at 1:56 PM'. A red arrow points from the 'Add File' button area to the trash icon next to the document entry.

Confirm that you want to remove the document from the application

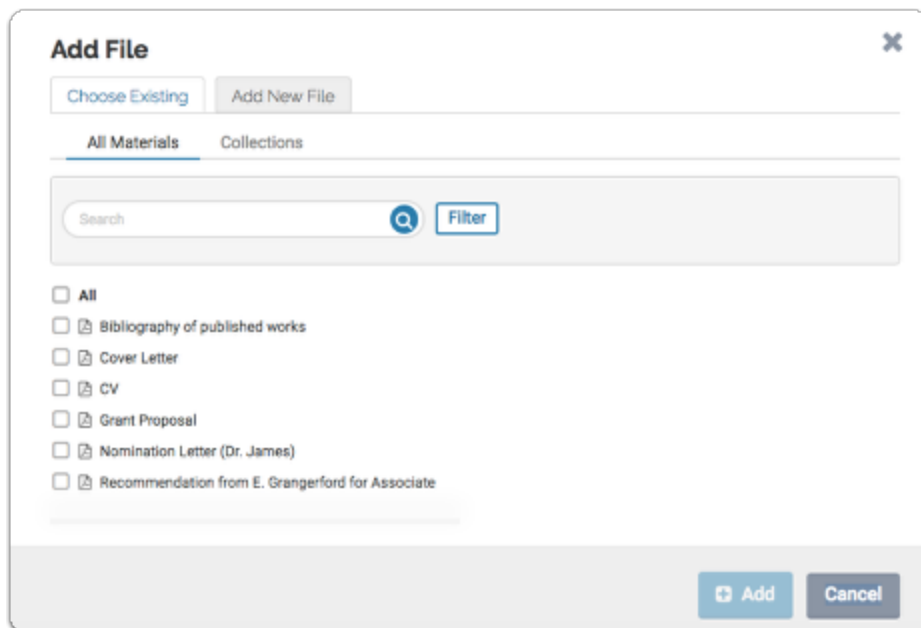


To replace a document, click "Replace" in the bottom right corner of the window



Select a replacement document and click "Add," or click "Add New File" to upload a new document

💡 Note that you can select from collections of materials, and filter the list of materials to find particular materials quickly.



Add File [X]

Choose Existing | Add New File

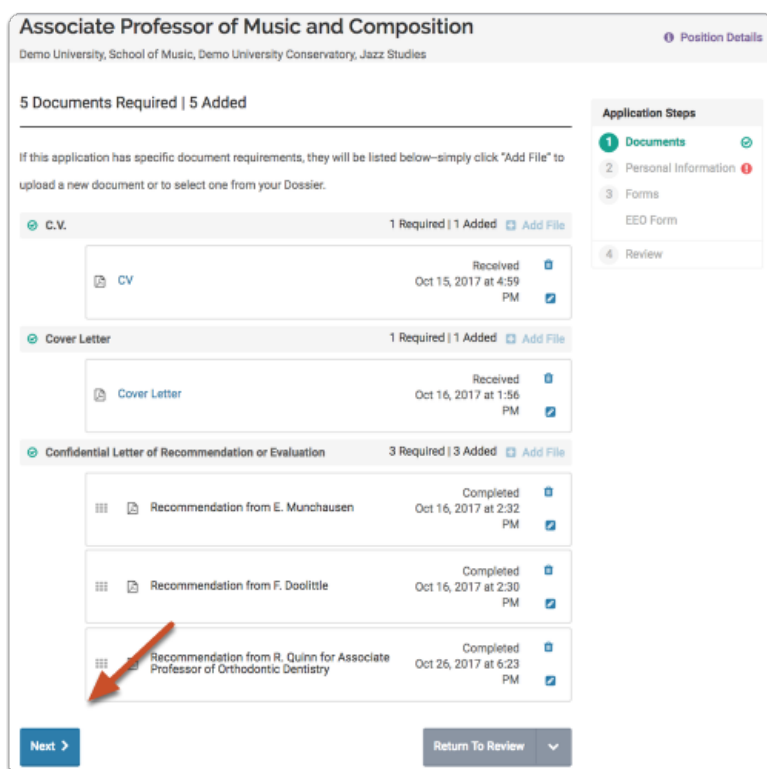
All Materials | Collections

Search [Q] Filter

- ☐ All
- ☐ Bibliography of published works
- ☐ Cover Letter
- ☐ CV
- ☐ Grant Proposal
- ☐ Nomination Letter (Dr. James)
- ☐ Recommendation from E. Grangerford for Associate

[Add] [Cancel]

Click "Next" when you are finished adding required documents



Associate Professor of Music and Composition [Position Details]

Demo University, School of Music, Demo University Conservatory, Jazz Studies

5 Documents Required | 5 Added

If this application has specific document requirements, they will be listed below—simply click "Add File" to upload a new document or to select one from your Dossier.

C.V. 1 Required | 1 Added [Add File]

CV Received Oct 15, 2017 at 4:59 PM [Add]

Cover Letter 1 Required | 1 Added [Add File]

Cover Letter Received Oct 16, 2017 at 1:56 PM [Add]

Confidential Letter of Recommendation or Evaluation 3 Required | 3 Added [Add File]

Recommendation from E. Munchausen Completed Oct 16, 2017 at 2:32 PM [Add]

Recommendation from F. Doolittle Completed Oct 16, 2017 at 2:30 PM [Add]

Recommendation from R. Quinn for Associate Professor of Orthodontic Dentistry Completed Oct 26, 2017 at 6:23 PM [Add]

[Next >] [Return To Review v]

Enter your personal information

Verify your name and address, select the highest degree you have earned, enter where and when you earned the degree. Note that you can choose not to disclose your education information. Click "Next" when you are finished.

Associate Professor of Music and Composition

Demo University, School of Music, Demo University Conservatory, Jazz Studies

Position Details

Name & Address

[Edit](#)

Samantha Reeves
33245 Hailied Ln
Moon, VA 23234
US

Education

Highest Degree Earned *

Ph.D. - Doctor of Philosophy

Receiving Institution *

Interfolio University

Date Earned *

Jun 6, 2017

☐ I prefer not to disclose my educational information.

[< Prev](#) [Next >](#) [Return To Review](#)

Application Steps

- Documents
- Personal Information**
- Forms
 - EEO Form
- Review

You may need to complete forms required for the application

i Simply fill out all forms and click "Next" when you are finished.

Another Sample Form

This is another sample form.

Are you an American Citizen? *

Check "Yes" or "No"

☐ Yes

☐ No

Heading

Have you registered for Selective Service? *

☐ Yes

☐ No

Application Steps

- Documents
- Personal Information
- Forms**
 - Clinical Experience
 - Another Sample Form**
- Review

Review, confirm, and submit your delivery (application)

This page gives an overview of your progress toward completing the application.



Each section must be completed before you can submit your application.

Review & Confirmation

NOT YET SUBMITTED Your application has not yet been submitted.
You may continue working on your application, or select the "Submit Delivery" option below.

Application Steps

- 1 Documents
- 2 Personal Information
- 3 Forms
- 4 Review

Document Requirements
5 Required | 5 Added

- C.V., 1 Required | 1 Added [Edit](#)
- Cover Letter, 1 Required | 1 Added
- Confidential Letter of Recommendation or Evaluation, 3 Required | 3 Added

Education Information
3 Required | 3 Completed

- Highest Degree Earned [Edit](#)
Ph.D. - Doctor of Philosophy
- Receiving Institution
Interfolio University
- Date Earned
Jun 6, 2017

Forms
1 Included

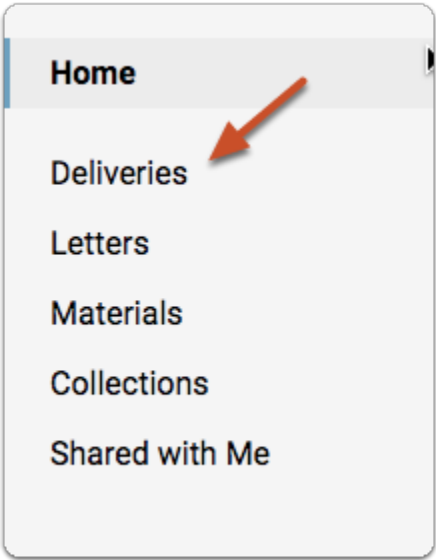
- EEO Form [Edit](#)

[✓ Submit Delivery](#) [Back to Deliveries](#)

Manage your applications from the "Deliveries" section of your Dossier account

You may review, edit, and track your Interfolio-hosted positions by navigating to "Deliveries."

Click "Deliveries" on the navigation bar



You will see in-progress and sent deliveries listed with status, notes, delivery type and actions. Click to edit, withdraw, or submit deliveries

Deliveries

New Delivery

In Progress

Recipient	Status	Notes	Type	Actions
<div><div></div><div>Demo University: College of Dentistry</div><div>Associate Professor of Orthodontic Dentistry</div></div>	Incomplete <div></div>	Previously submitted; requirements incomplete. Accepting Applications Due May 1, 2018 by 11:59 PM ET	Interfolio-hosted Position	<a>Edit <a>Withdraw


Sent Deliveries

Recipient	Status	Notes	Type	Actions
<div><div></div><div>Demo University: College of Dentistry</div><div>Associate Professor of Periodontics</div></div>	Complete (Pending Letters)	Editable Due Mar 1, 2018 by 11:59 PM ET	Interfolio-hosted Position	<a>Edit <a>Withdraw
<div><div></div><div>Interfolio Test University: College of Arts and Sciences: English Department</div><div>Assistant Professor, English Composition</div></div>	Complete	Editable	Interfolio-hosted Position	<a>Edit <a>Withdraw

Manage your materials through Interfolio

Remember, we keep the materials you use for Interfolio-hosted applications in your Dossier, and with your free account you can use Interfolio to manage all of your supporting materials for

academic opportunities. With an upgrade to Dossier Deliver, you can [create and send deliveries of your Dossier materials](#) to the places you need them to go!

 See here for more information on how to use your account to [manage your Dossier materials](#).

Searching for opportunities through Interfolio:

You can search for interfolio-hosted positions, and include results matching your keywords on the job boards of Inside Higher Ed, HigherEd Jobs, and HERC (Higher Education Recruitment Consortium)

Click "New Delivery"

Home

Deliveries

Letters

Materials

Collections

Shared with Me

Deliveries

In Progress


Recipient	Status	Notes	Type	Actions
<div><div></div><div>Demo University: School of Architecture: Department of Architectural History</div><div>Assistant Professor of Landscape Architecture</div></div>	In Progress <div></div>	Accepting Applications Due Aug 16, 2018 by 11:59 PM ET	Interfolio-hosted Position	Edit Delete
Test	In Progress <div></div>		Mail	Edit Delete
<div><div></div><div>Automation University: Automation BFU: Automation LFU</div><div>Auto Test published landing page</div></div>	In Progress <div></div>		Interfolio-hosted Position	Edit Delete

Sent Deliveries

Recipient	Status	Notes	Type	Actions
Demo Univeristy	Preparing To Send		Email	Review Cancel

 [+ New Delivery](#)

Enter search terms under "Find an Opportunity"

 Try searching for the name of an institution, a position title, or position type.


[Deliveries](#) >

New Delivery

Send Materials


Email

Send materials to a designated email address.




Mail

Send printed materials to a street address or PO Box.



Confidential Letter Upload

Send recommendation letters to an online application.




Find an Opportunity

Find and apply to positions hosted through Interfolio. Institutions use Interfolio to manage their recruitment and hiring. You can apply to any of these positions for free.

Interfolio University

You can also search other sources:

- Inside Higher Ed
- HERC
- HigherEd Jobs



A list of open Interfolio-hosted positions matching your search terms will appear. Click the title to view position details such as description, qualifications, etc.

[Home](#)
[Deliveries](#)
[Letters](#)
[Materials](#)
[Collections](#)
[Shared with Me](#)

Deliveries

[New Delivery](#)

In Progress

Recipient	Status	Notes	Type	Actions
Demo University: School of Architecture: Department of Architectural History Assistant Professor of Landscape Architecture	In Progress	Accepting Applications Due Aug 16, 2018 by 11:59 PM ET	Interfolio-hosted Position	Edit Delete
Test	In Progress		Mail	Edit Delete
Automation University: Automation BFU: Automation LFU Auto Test published landing page	In Progress		Interfolio-hosted Position	Edit Delete

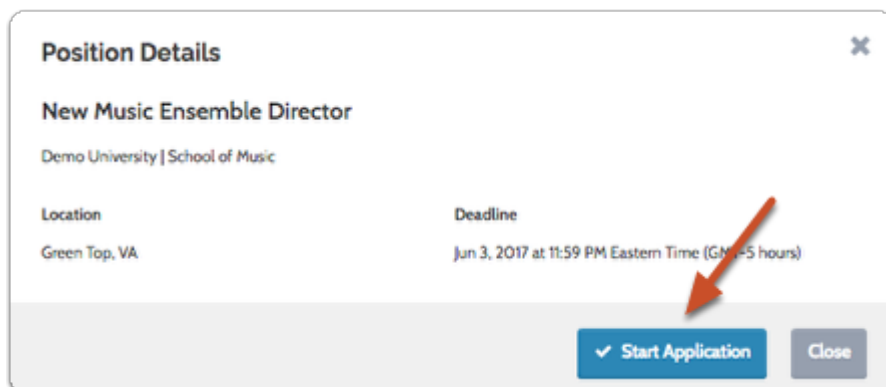
Sent Deliveries

Recipient	Status	Notes	Type	Actions
Demo Univeristy	Preparing To Send		Email	Review Cancel

[View all sent deliveries](#)

Interfolio-hosted position: anyone can apply for free to positions hosted through Interfolio—Dossier Deliver is not required, and it doesn't count toward your 50 annual deliveries.

Click "Start Application" to apply



Position Details [X]

New Music Ensemble Director

Demo University | School of Music

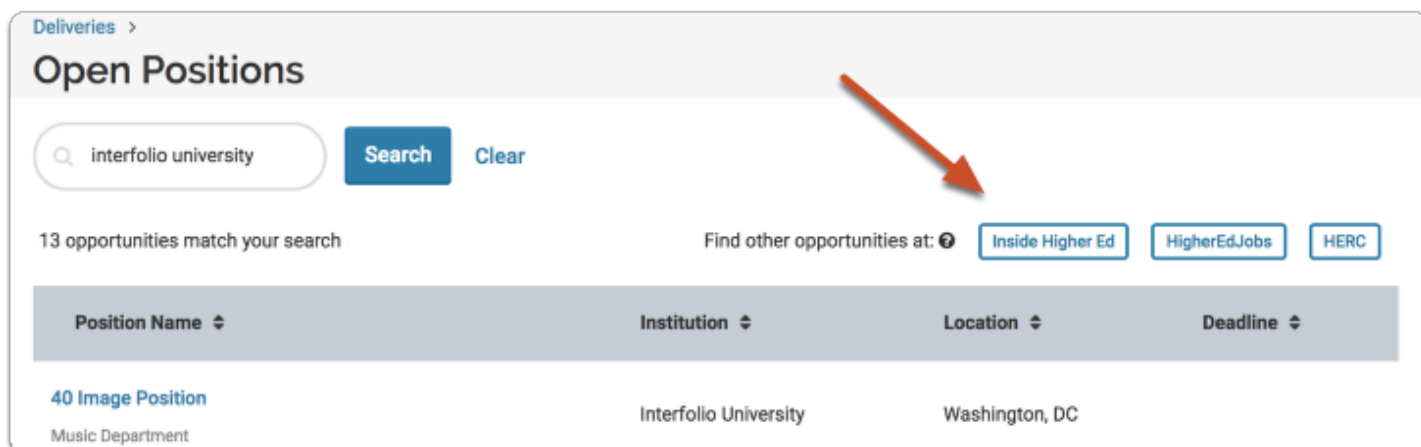
Location: Green Top, VA Deadline: Jun 3, 2017 at 11:59 PM Eastern Time (GMT+5 hours)

[✓ Start Application] [Close]

An orange arrow points to the "Start Application" button.

You can also click to include results for your search from Inside Higer Ed, HigherEdJobs, and HERC

This will open a page with results from your search on the selected site.



Deliveries >

Open Positions

interfolio university [Search] [Clear]

13 opportunities match your search Find other opportunities at: [?] [Inside Higher Ed] [HigherEdJobs] [HERC]

Position Name ⇅	Institution ⇅	Location ⇅	Deadline ⇅
40 Image Position Music Department	Interfolio University	Washington, DC	

An orange arrow points to the "Inside Higher Ed" button.

Evaluator's Guide to Faculty Search

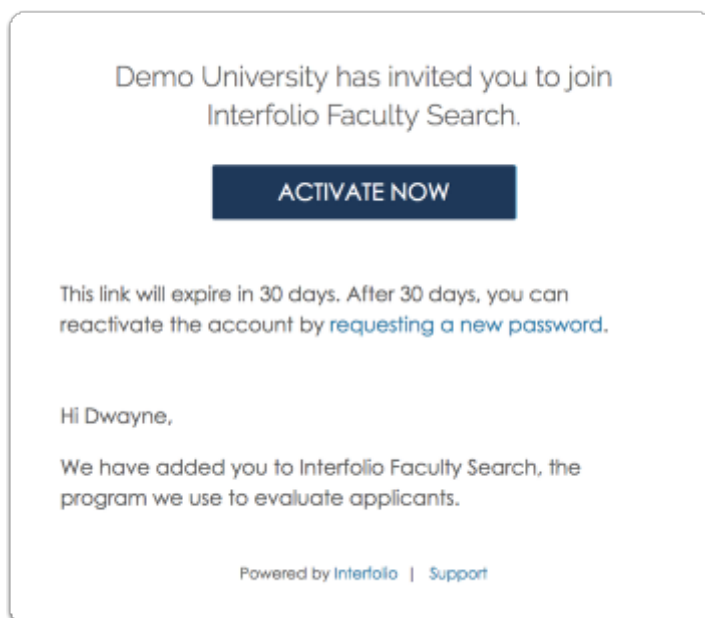
Interfolio Faculty Search provides faculty members and staff with a set of tools specifically designed to facilitate academic committee work. When its time to hire faculty or consider fellowship applications, evaluators can easily access and review applicant materials and participate in committee activities on-line with Faculty Search.

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

Getting started:

If you do not already have an Interfolio account, you will get an email inviting you to activate your free account

Click "Activate Now" in the invitation email.



Set your password, agree to our terms of service and click "Activate Account" to access Faculty Search

Activate Account

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

Email Address

derrol@demo.edu

First Name *

Dwayne

Last Name *

Errol

Password *

☐ Show Password

☐ I agree to Interfolio's [Terms of Service](#).

Activate Account

If you already have an account with us, your invitation email will take you to your account to sign in

Demo University has invited you to join Interfolio
Faculty Search.

ACCESS NOW

This link will expire in 30 days. After 30 days, you can reactivate the account by [requesting a new password](#).

Samantha,

You have been assigned to review applications for the position of Associate Professor of Music. We have added you to Interfolio Faculty Search the program we use for academic hiring. If you have questions...

Powered by [Interfolio](#) | [Support](#)

Sign into your account

You can sign in to the program with your email and password, your Google account, or using your institutional ID.

Sign In

Sign in with email
Email *


Password *

Sign In

[Forgot your password?](#)

Or sign in with:

Partner Institution

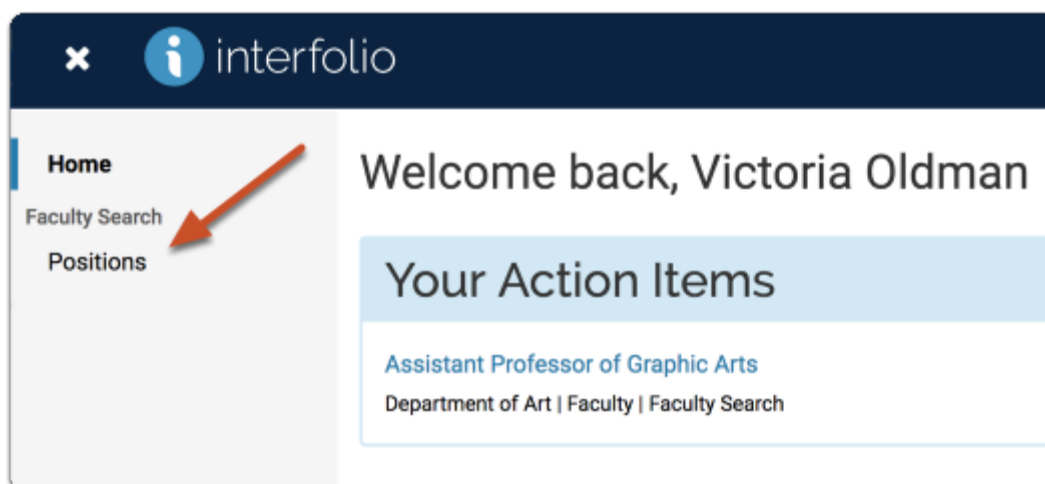
 Google

Don't have an account?
Use Interfolio's suites of services to simplify your academic life.
[Create an account](#)

Viewing the list of positions:

Click "Positions" in the left hand menu to see a list of positions you have been assigned to evaluate

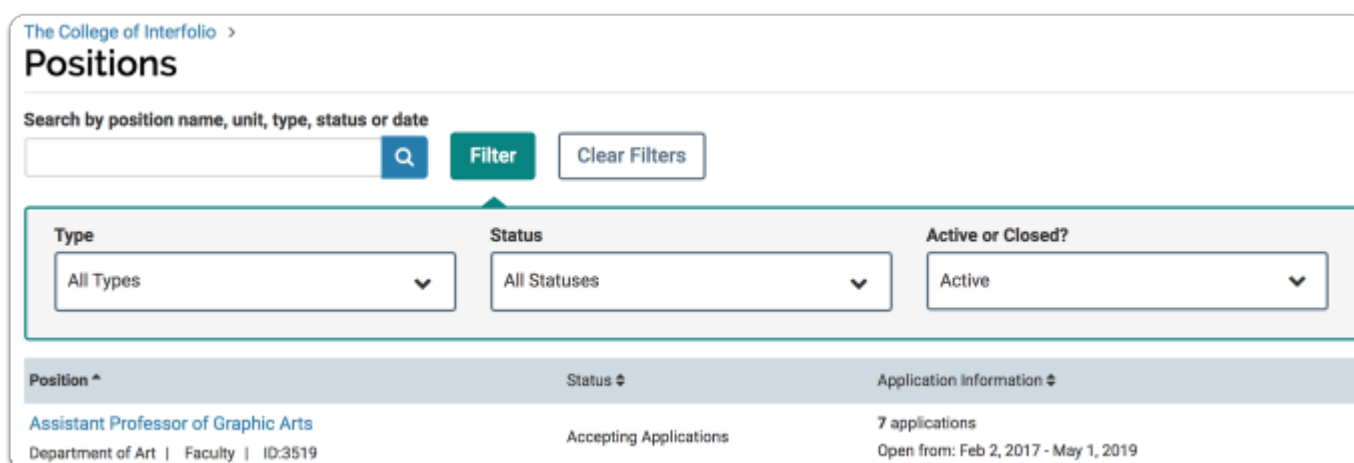
Alternatively, you can click the name of a particular position in your list of action items to open it.



Positions are listed in a table that displays the position name, status, type, and open and close dates

The positions to which you have access will display in a table that lists:

- **Position:** The name or title of the position you are trying to fill such as "Associate Professor..."
 - Beneath the position title you will see the department, position type (faculty, fellowship, staff, etc), and position ID number
- **Status:** The position status describes the current state of the search, such as; "Accepting Applications," "Under Review", etc.
- **Application Information:** The number of applications for the position and the open and close dates indicating when a position is open or closed to new applications



Position list management:

We have features to help you search, sort, and organize the list of positions you have been assigned to evaluate.

- **Search:** You can search for a particular position by name, unit, position type, status or date
- **Filter:** You can also filter the list to only display positions of a particular type, status, or limit the display to either active or closed positions

The College of Interfolio >

Positions

Search by position name, unit, type, status or date

Type

Status

Active or Closed?

All Types

All Statuses

Active

Position ^	Status ^	Application Information ^
Adjunct Professor of English Department of English Faculty ID:4082	Accepting Applications	1 applications Opens: Jul 3, 2018
Assistant Professor of Graphic Arts Department of Art Faculty ID:3519	Accepting Applications	7 applications Open from: Feb 2, 2017 - May 1, 2019
Assistant Professor Painting and Printmaking Department of Washington DC Sports Temporary Help ID:3761	Reviewing Applicants	0 applications Open from: Mar 15, 2017 - Jun 21, 2019
Creative Writing Fellow in Poetry Department of English Fellowship ID:3526	Accepting Applications	0 applications Opens: Jan 16, 2018

Viewing the list of applicants:

Click the position title to access the applications for a position

The College of Interfolio >

Positions

Search by position name, unit, type, status or date

Type

Status

All Types

All :

Position ^

[Adjunct Professor of English](#)
 Department of English | Faculty | ID:4082

[Assistant Professor of Graphic Arts](#)
 Department of Art | Faculty | ID:3519

Applications are listed in a table that displays the applicant name, the date the application was last updated, the applicant status, and if permissions allow; tags and a rating summary

At the top of the page you will see the unit where the position is posted, the current position status and open and close dates.

The applications display in a table that lists:

- **Applicant name:** click the applicant's name to open their application and view their application materials, or check the box next to the name to select more than one applicant.
- **Application Status:** The application status describes the place of the applicant in the search process, such as; "Add to Shortlist," "Not Competitive," "Invited for Interview," etc.
- **Tags:** Tags are short bits of text tags that can be used to sort or mark applications for a variety of purposes. If permissions allow you can create tags and view tags added by others to applications.
- **Rating:** If permissions allow you can rate applicants on custom criteria using a five star scale. Depending on the settings for the position, you may be able to see your overall rating listed here.

💡 The applicant list can get quite long. For more information on the features we have for managing a large applicant pool see below [Organizing the Applicant List](#).

The College of Interfolio > Positions >

Assistant Professor of Graphic Arts

Position Actions

Unit	Status	Opens	Closes
Department of Art	Accepting Applications	Feb 2, 2017	May 1, 2019

Applicants

Search by name, education, or status

Filter

Saved Views

Columns

7 of 7 Applicants Shown.

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	Maria Anderson				
<input type="checkbox"/>	M.F.A. - Master of Fine Arts, Interfolio University	Nov 9, 2014	Shortlist	Strong portfolio WL Wrong Degree	★★★★☆
	COMPLETE				

Reviewing application materials on-line:

Check the name of one or more applicants in the list to review their submitted materials

 Selecting a name or names from the list opens a new set of buttons on the page.

7 of 7 Applicants Shown

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/>	Wana Anderson	Nov 9, 2014	Shortlist	Strong portfolio WL Wrong Degree	★★★★☆
COMPLETE					
<input checked="" type="checkbox"/>	David Taylor	Nov 9, 2014	Shortlist	Previous applicant Strong portfolio	★★★★☆
COMPLETE					

Click "Read" in the upper right corner of the page to view selected applications in your browser

Closes
May 1, 2019

[Filter](#) [Saved Views](#) [Columns](#)

[Read](#) [Tag](#) [More](#)

Tags My Overall Rating

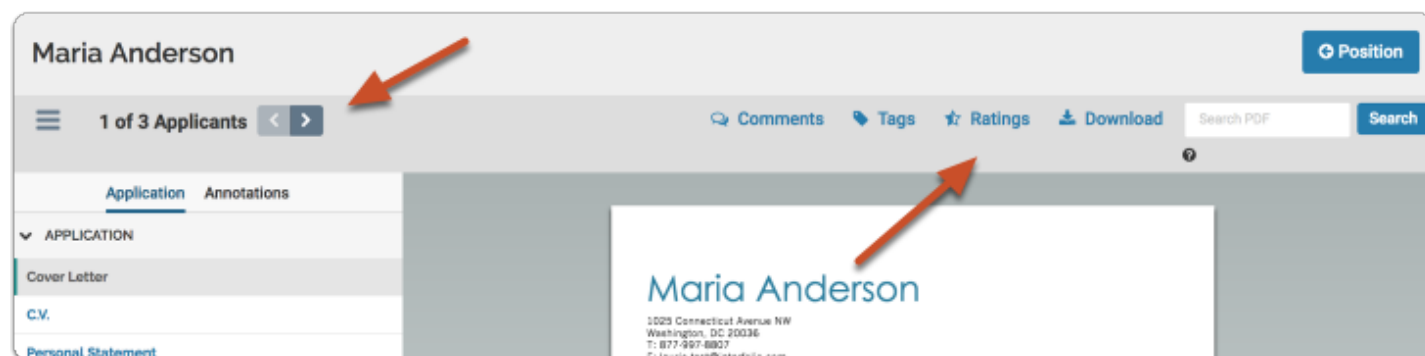
Strong portfolio WL Wrong Degree

★★★★☆

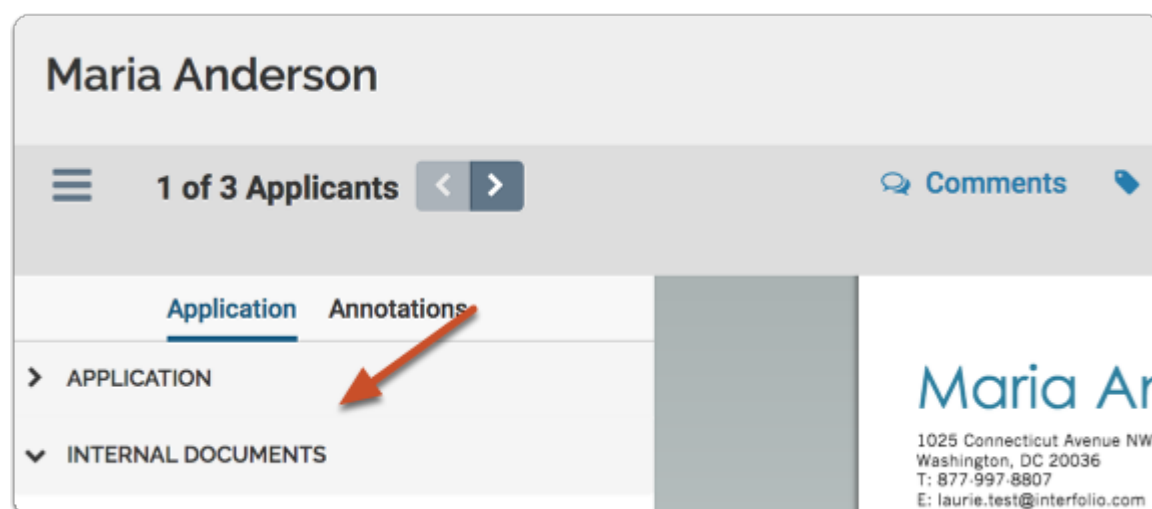
Review applications on-line using our materials viewer

Application materials open in Interfolio's materials viewer within your browser. You can scroll through the applications, search for terms in .pdf documents that are part of the application,

and if permissions allow, you can leave comments, tags, and give applicants a rating on pre-defined criteria.



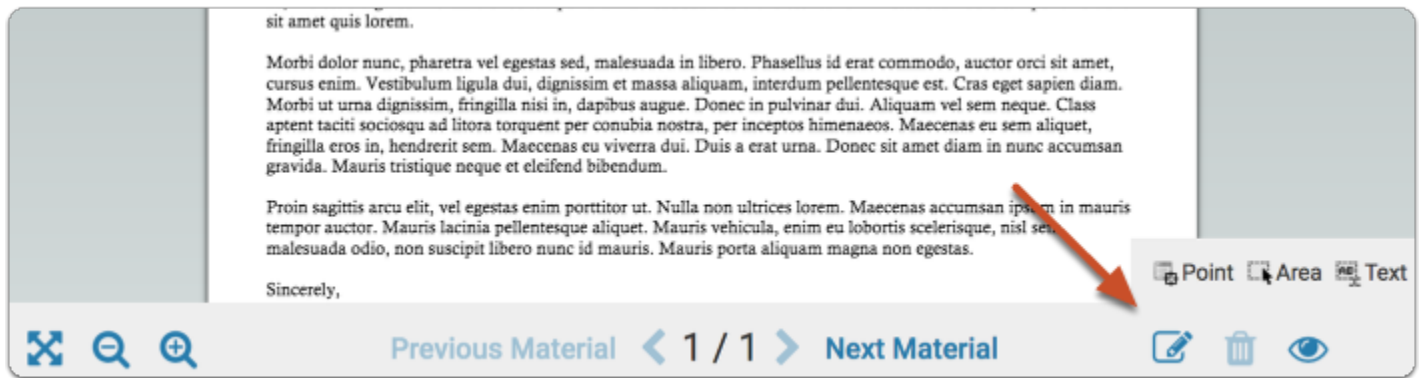
Materials submitted by the applicant appear bookmarked as application materials. If internal documents have been added to the application by the committee, these are bookmarked in the viewer as well.



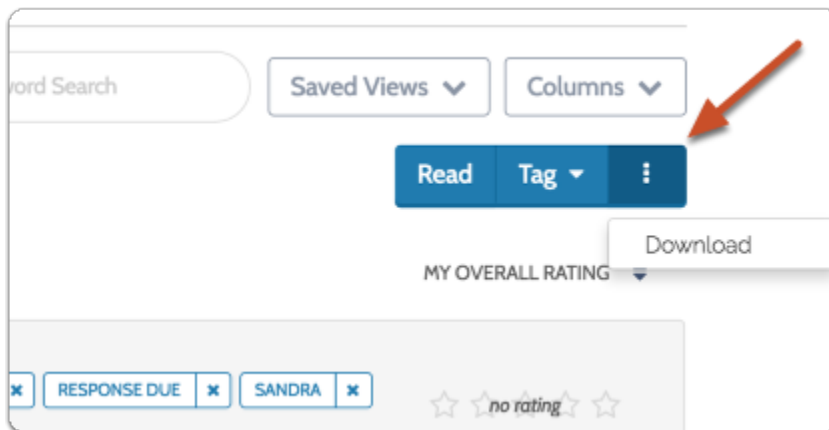
You can leave notes/annotations on the material from the lower right of the viewer

 Only you can view the notes you leave on an application.

- Point notes are virtual stickies that point to something in the document
- Area notes allow you to select a section of text in a document
- Text notes highlight passages of selected text



Click the "More Options" icon and select "Download" to save PDF copies of all selected applications



Application list management:

The list of applications for a position is often very long. We have features to help you search, sort, organize, and customize the list of applicants. We also allow you to save your views of the list so you can recall your work when going through applications.

- **Search:** You can search for a particular position by name, unit, position type, status or date
- **Filter:** You can also filter the list to only display positions of a particular type, status, or limit the display to either active or closed positions

The College of Interfolio >

Positions

Search by position name, unit, type, status or date

Type

Status

Active or Closed?

All Types

All Statuses

Active

Position ^	Status ^	Application Information ^
Adjunct Professor of English Department of English Faculty ID:4002	Accepting Applications	1 applications Opens: Jul 3, 2018
Assistant Professor of Graphic Arts Department of Art Faculty ID:3519	Accepting Applications	7 applications Open from: Feb 2, 2017 - May 1, 2019
Assistant Professor Painting and Printmaking Department of Washington DC Sports Temporary Help ID:3761	Reviewing Applicants	0 applications Open from: Mar 15, 2017 - Jun 21, 2019
Creative Writing Fellow in Poetry Department of English Fellowship ID:3526	Accepting Applications	0 applications Opens: Jan 16, 2018

The Applicant Profile:

Click the name of an applicant to view that applicant's profile page

<input type="checkbox"/> Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/> Drea Bewl INCOMPLETE	Oct 3, 2017	<input type="button" value="+"/>		☆☆☆☆☆
<input type="checkbox"/> Francine Billings INCOMPLETE	Oct 2, 2017	<input type="button" value="+"/>		☆☆☆☆☆

From the profile page you can view and add tags to the application (if enabled), and access application materials (click the name of a file to open it, or click to download the material)

Demo University > Positions > Assistant Professor of Landscape Architecture >

Sasha Brown

Actions

Education Information

Status

Hired [change](#)

Tags

Documents

INCOMPLETE

Add File

Read

Title (pending)

C.V.

Pending: not yet received

Ratings

My Ratings

Committee Summary

Average

★ ★ ★ ☆ ☆

★ ★ ★ ☆ ☆

Quality of Research

★ ★ ★ ★ ☆

★ ★ ★ ★ ☆

Quality of Teaching

★ ★ ☆ ☆ ☆

★ ★ ☆ ☆ ☆

Scholarship

★ ★ ★ ★ ☆

★ ★ ★ ★ ☆

If enabled, you may be able to rate the applicant, and leave comments and notes on the application

The screenshot displays a user interface for reviewing an application. At the top, there are two recommendation cards: one from B Aiko (Accepted Jan 9, 2017) and one from Rebecca Stone (Received Jan 9, 2017). Below these is a 'Ratings' section with a dropdown menu. The ratings are organized into two columns: 'My Ratings' and 'Committee Summary'. The 'My Ratings' column shows five empty star icons for 'Average', 'Teaching', 'Scholarship', and 'Research'. The 'Committee Summary' column shows five filled star icons for 'Average', 'Teaching', and 'Scholarship', and four filled star icons for 'Research'. Below the ratings is a 'Comments' section with a dropdown menu and an 'Add Comment' button. A comment by Stephanie Bigsley from Jan 8, 2017, is visible, stating 'This is a strong application.' At the bottom is a 'Notes' section with an 'Add Note' button.

	My Ratings	Committee Summary
Average	☆☆☆☆☆	★★★★☆
Teaching	☆☆☆☆☆	★★★★☆
Scholarship	☆☆☆☆☆	★★★★☆
Research	☆☆☆☆☆	★★★★☆

You can click "Read" to open the application in our materials viewer, or "Download" to save the application materials

The screenshot shows a document interface for an application. At the top, there is a 'Documents' section with a dropdown menu. To the right of the dropdown are two buttons: 'INCOMPLETE' (in a red box) and 'Add File' (in a blue box). To the right of the 'Add File' button is a 'Read' button (in a blue box). Below the buttons, the document title is 'Title (pending)' with a small icon, and the subtitle is 'C.V.'. On the right side, there is a status indicator 'Pending: not yet received' and two icons: a trash can and a download icon. A red arrow points to the 'Add File' button.

Organizing the Applicant List:

Tagging Applications

If your institution allows it, you can add and create tags to attach to an application. Tags are bits of text you can use to help identify, sort, and mark applications.

1. With one or more applicants selected in the list, click the "Tag" button and select an existing tag or create a new one
2. By default, tags will appear listed in the applicant table (See below for instructions on configuring the columns displayed in the list)

<div>ReadEmailStatus▼Tag▼⋮</div>					
<input type="checkbox"/>	Applicant Name ▲	Date Updated ▲	Applicant Status	Tags	My Overall Rating ▲
<input checked="" type="checkbox"/>	Sasha Brown INCOMPLETE	Jan 25, 2018	Hired	<div>+</div>	★★★★☆
<input type="checkbox"/>	Jane Doe INCOMPLETE	Nov 11, 2015	Shortlist	<div>+</div>	☆☆☆☆☆

Filtering the list of applicants

Click the "Filter" button at the top of the list to open a set of options for filtering the list. You can filter the list of applications by data points including highest degree earned, application status, tags, ratings, or completion status.

APPLICANTS (3 of 3)

Filter

Keyword Search

Saved Views ▼

Columns ▼

HIGHEST DEGREE EARNED:
☐ Ph.D. - Doctor of Philosophy

APPLICATION STATUS:
☐ Shortlist

TAGS:
☒ Response due
☐ Sandra
☐ Wrong Degree
☐ Draft
☐ Evaluated

COMPLETE


AllYesNoArchived


MY RATING:
☆☆☆☆☆ no rating

RESPONSE DUE ✕

Save

Clear Filters

 The list will be filtered according to your settings and the filters will appear above the list.

 Note that you can easily remove the filters you add either one at a time, or by hitting the button tagged "Clear Filters."

APPLICANTS (3 of 3) Filter Keyword Search

HIGHEST DEGREE EARNED:

☐ Ph.D. - Doctor of Philosophy

APPLICATION STATUS:

☐ Shortlist

TAGS:

☒ Response due

☒ Sandra

☐ Wrong Degree

☐ Draft

☐ Evaluated

RESPONSE DUE SANDRA Save Clear Filters

Saving views of the Applicant list

Click "Save"

HIGHEST DEGREE EARNED:

☒ M.M. - Master of Music

APPLICATION STATUS:

☐ Interview

☒ Offer Pending

☐ Shortlist

M.M. - MASTER OF MUSIC OFFER PENDING Save Clear Filters

Enter a name and click the check mark

HIGHEST DEGREE EARNED:

☒ M.M. - Master of Music

APPLICATION STATUS:

☐ Interview

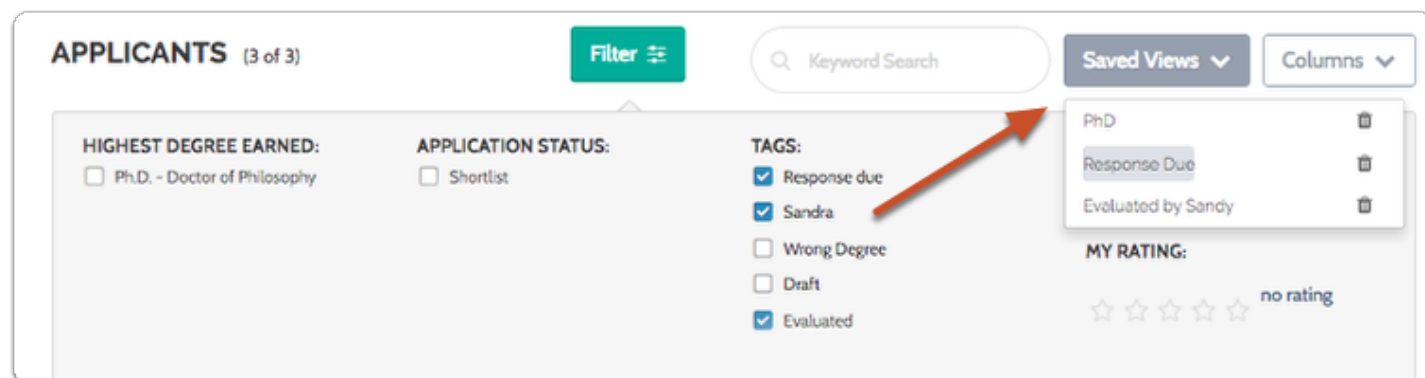
☐ Offer Pending

☐ Shortlist

M.M. - MASTER OF MUSIC Save Clear Filters

☐ **APPLICANT NAME** Masters Degree ✓ ✕ SION D


Click "Saved Views" (to the right of the page) to recall the view of the list using the filters you have set

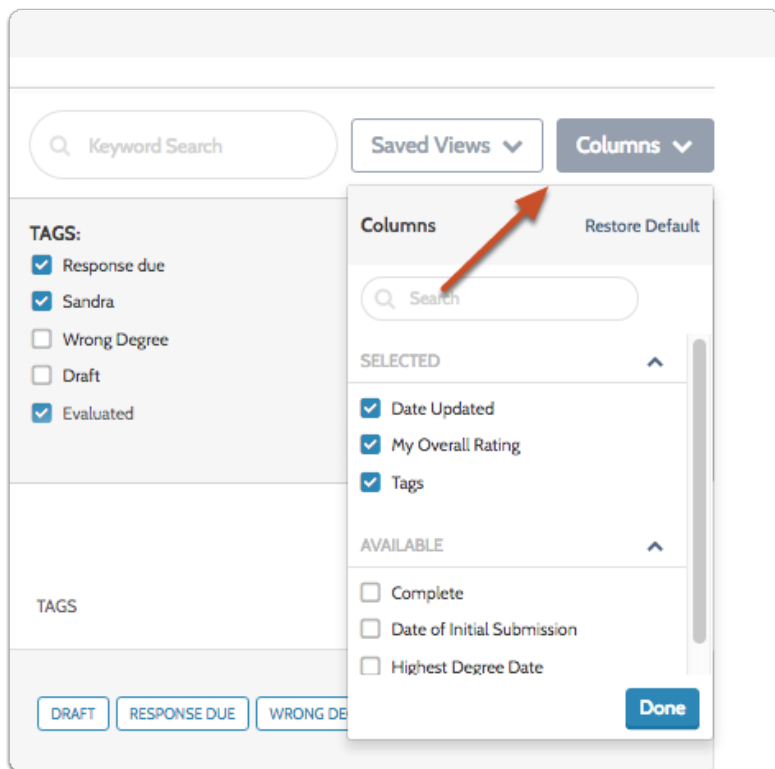


Customizing the columns of information that display on your view of the applicant list:

Click the "Columns" button to the right of the page and select the columns of information you want to display

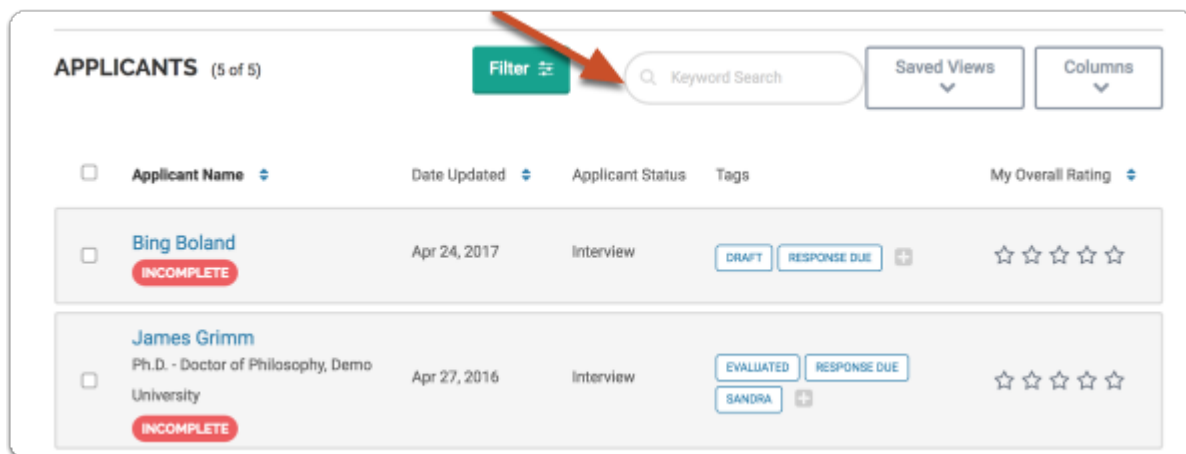
The default columns that will display are applicant name, date updated, tags, and overall average rating (if enabled). You can add columns for complete status, date submitted, highest degree earned and highest degree date, and your overall ratings. Note that you can restore the default columns at any time.

 You can also add answers to custom form questions as column headers in the display.

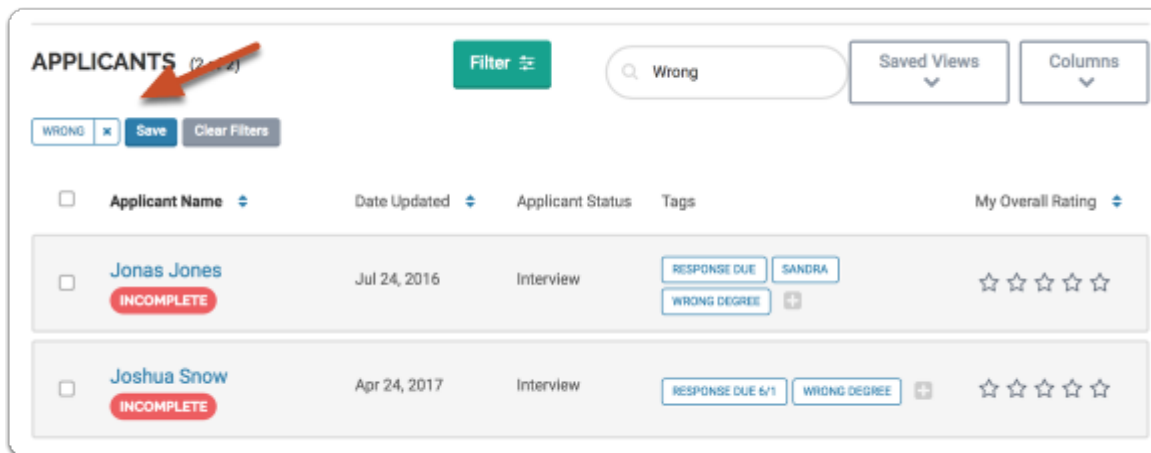


Searching the Applicant list and saving searches:

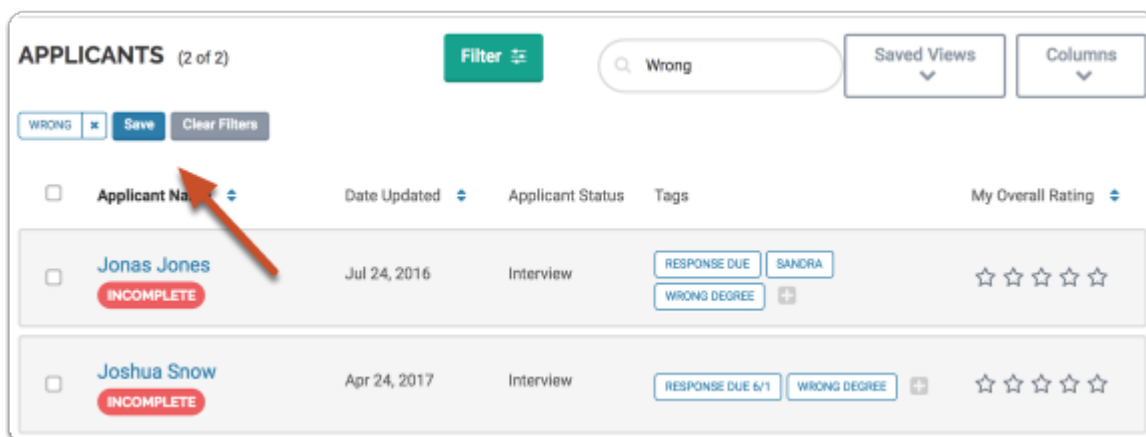
Enter a keyword in the box to search the list.



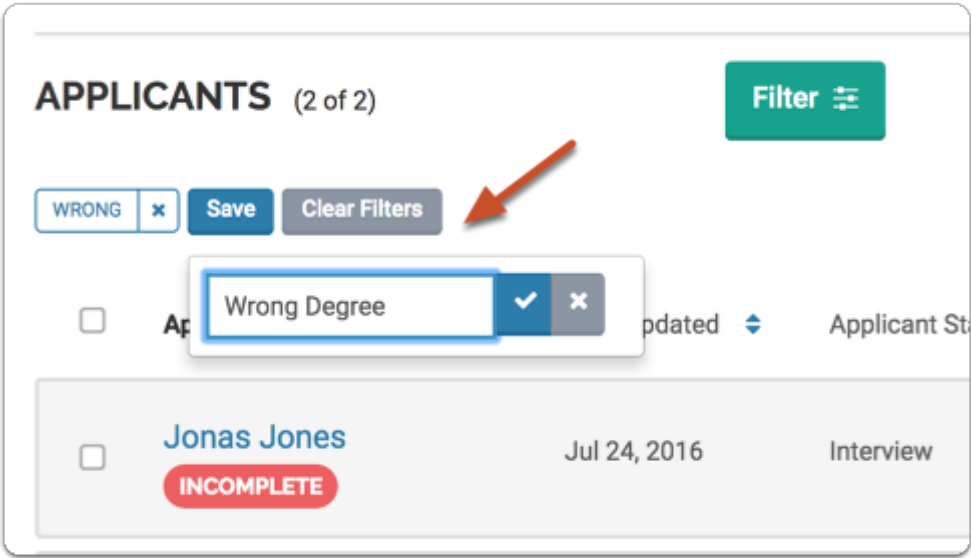
The results display and the search term appears above the list



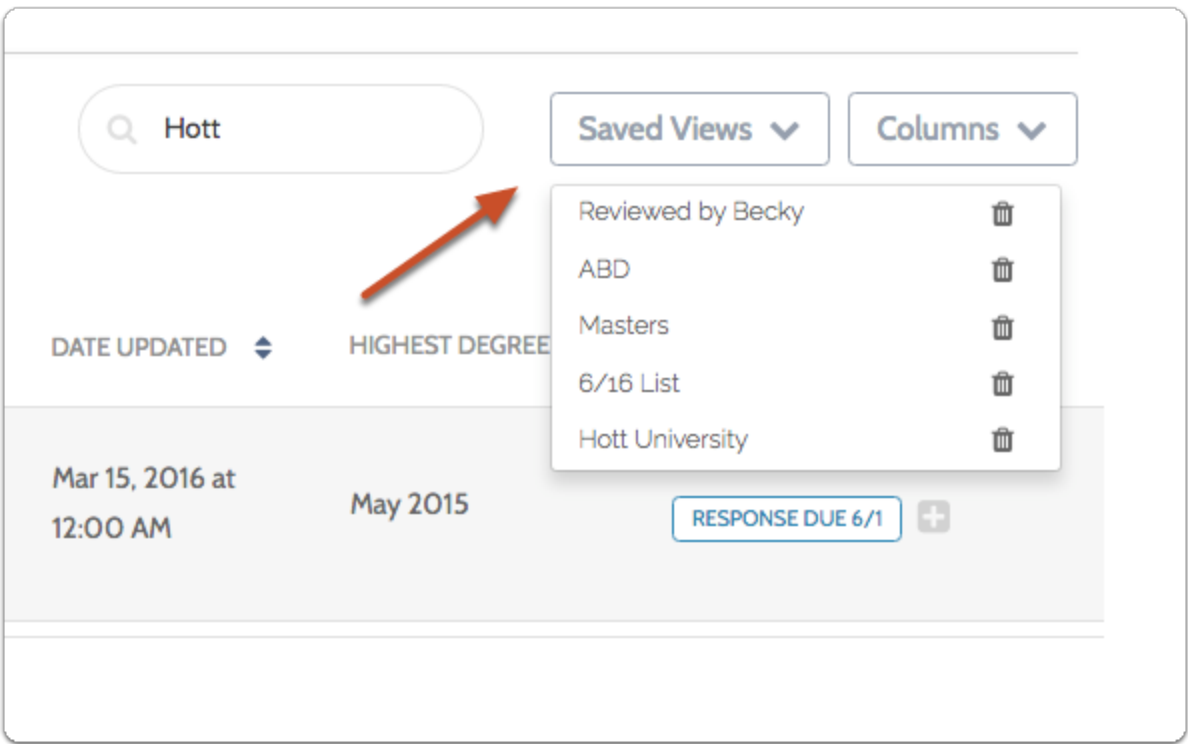
Click "Save" to save and name the view of the list filtered according to your search results



Enter a name for your view and click the check to save it



Click "Saved Views" to the right of the page to recall the saved view of the list



Setting the pagination of the applicant list

- i By default the list displays 25 applications at a time, but you can set the pagination to display 50, 100, 200, or all applications. Look to the bottom left of the page to set the number of applicants displayed at one time.



- 💡 Remember that changes you make to the filters, columns, searches and pagination will be remembered during your session. To save the searches and filtered views of the list, click the "Save" button and give the current view a name.

Administrator's Guide to Interfolio Review, Promotion, and Tenure

Your Interfolio Account Dashboard and Account Settings

This article explains how your Interfolio account dashboard is configured, some basics on what you can do once you're there, and how you can access your account settings to change basic user information.

After signing in, you will see your account page. From here you can access all of the accounts you have with Interfolio and your Interfolio Account Settings.

Your Institution account page

You will find links to the Interfolio products to which you have access on the Interfolio account screen.

1. If your institution uses Review, Promotion & Tenure, Faculty Search, and Faculty180, than relevant pages will be displayed here.
2. You can also access your Dossier account (personally or institutionally created). If you have access to one, you can access it by the user menu in the top right corner.

Home

Faculty 180

Announcements & Help

Profile

Activities

Evaluations

Forms & Reports

Vitas & Biosketches

Find Colleagues

Account Access

Administration

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Welcome back, Scott Harris

Your Action Items

Associate Professor, Intercultural Studies

Department of Sociology | Faculty | Faculty Search

Assistant Professor of Landscape Architecture

Department of Architectural History | Faculty | Faculty Search

Assign Activity Classifications for Imported Scholarly Works

Activity Input | Faculty 180

Review Possible Duplicates from Activity Imports

Activity Input | Faculty 180

You have been named by a faculty member within your institution as a contributor to an intellectual or creative contribution.

Please verify.

Activity Input | Faculty 180


Additional Assigned Items

Search by keyword

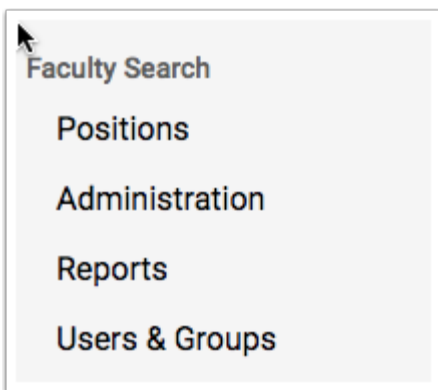
Institutional Branding

[Read about how to brand institutional products here.](#)


The Faculty Search Navigation Bar

-  Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Evaluators or Committee Managers in the program.

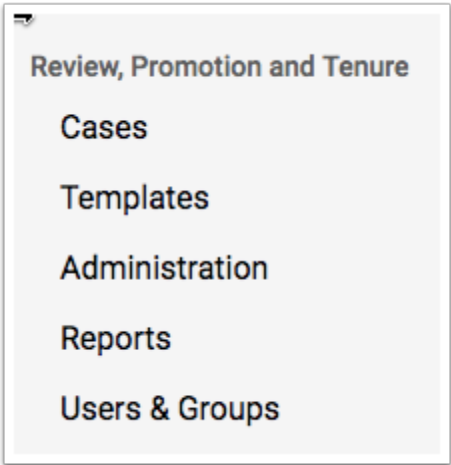
Click "View Positions" to view your active searches




The Review, Promotion, and Tenure dashboard:

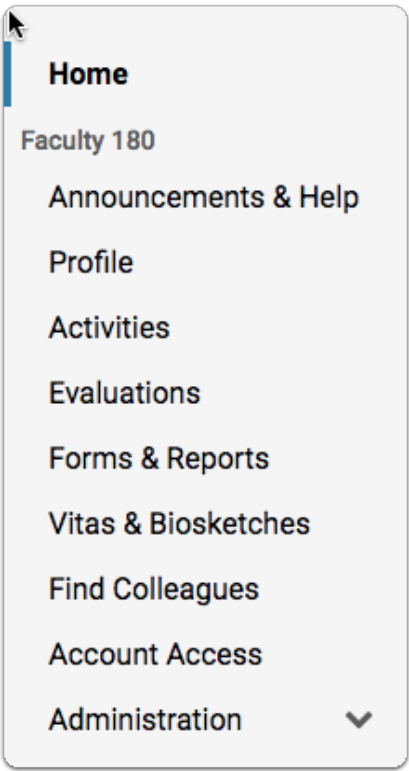
-  Depending on your role in the program, some or all of the following functions are available from the dashboard. Not all of these functions or links will appear for Committee Managers or committee members in the program.

Click "View Cases" to access the cases you are managing or evaluating



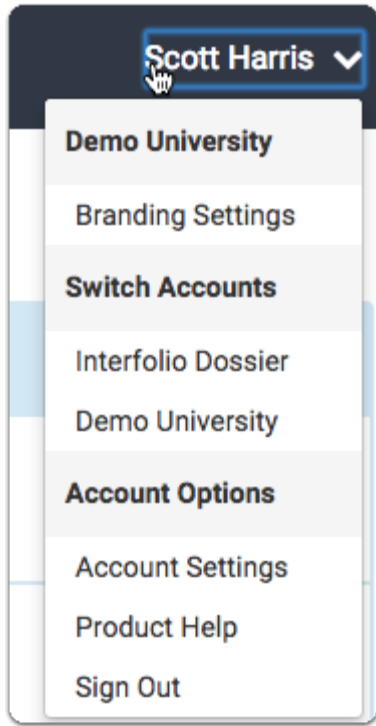
The Faculty180 Navigation Bar

 Users will only see the relevant pages, depending on institutional settlings.
All administrative settings are in the Administration section




To access the settings for your account:

Click your name in the upper right hand corner of the screen and select "Account Settings" from the drop down menu.



The Account Settings page:

 The tabs below appear if you have a Dossier and Interfolio account.

Personal Information

From the "Basic information" tab of "Account Settings," you can access and manage personal information such as your career details, and also contain information like your address and degree. In other tabs you can find your email and notification settings, and any delivery ID numbers associated with your account, as well as some other settings.

Settings

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

Personal Information

First Name *

Scott

Last Name *

Harris

Status (Pick the option that best describes you) *

Tenure-track

Position Title

Assistant Professor

Organization

NYU School of Business

Scholarly Discipline *

Business

I am or would use Dossier to ... *

☐ Apply to jobs in higher education

☒ Apply to alternative academic jobs

☒ Apply to grants

☐ Apply to graduate degree programs

☐ Search for jobs

Communications

From the "Communications" tab, you can manage communication settings including how and when you receive email from Interfolio

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

Email

+ Add Email

Email notifications related to your Dossier account (such as renewal notices) will only be sent to your primary email address.

Primary

scott.harris@interfolio.com

If you have another account under a different email address you can merge the accounts to access all the information in one place. [Learn more about merging accounts](#)

Merge Accounts

Additional Email Addresses

You can sign in with these email addresses and your Dossier password.

scott.harris@sharklasers.com

Make Primary

X

Communications

Note: you will always receive important messages and notifications about your account, such as when you reset your password, or when a requested letter or evaluation arrives.

☐ Keep me informed about product updates, best practices, and promotions

User Guides

Page 98

ID numbers

Need to add ID numbers regularly to your deliveries? If so, than you can use the Interfolio ID storage tool to be able to easily store and attach it to your deliveries.

Settings

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

ID Numbers

+ Add ID Number

ID numbers are numbers that you can associate with a delivery to make sure the materials you are submitting go to the right place. These numbers are not required by Interfolio, but some institutions may require them.

AAMC

12345432345t432

X

Subscription & Billing

From the "Subscription & Billing" tab, you can renew your account, add delivery credits, view your remaining deliveries, download all data and documents in your account, manage payment info, and view and download a record of your transactions.

Settings

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

Subscription

Dossier Deliver + Dossier Institution

Expires on Mar 25, 2019

☒ Automatically renew my subscription

[Apply an offer code to my next renewal](#)

[Download All Data & Documents](#)

Remaining Deliveries

49

[Add more deliveries](#)

Deliveries expire Mar 25, 2019

Payment Information

Credit Card

Visa ****1111

Expiration

9/2022

Name on Card

Scott Harriss

Transaction History

[Download Filtered Transactions](#)

Search

Transaction Date

MMM D, YYYY

to

MMM D, YYYY

Date	Description	Amount	Receipt
------	-------------	--------	---------

User Guides

Page 99

From the "Password" tab, you can change the password for your account

Settings

Basic Information

Email & Communications

ID Numbers

Subscription & Billing

Signing in & Password

Signing In

Default account

When I sign in, take me to the following account by default:

☒ Demo University

☐ Dossier

☐ Ask me when I sign in

Note: if you are prompted to sign in when attempting to access a link, we will always take you to that link after you sign in regardless of this setting.

Password

Note: this sets the password for your Interfolio account only. If you log into Interfolio through your Google account or using your institutional ID and password, you will need to contact Google or your institution to change your password.

Enter your current password *

Current password

Enter your new password *

Notifications:

Users will receive alerts and notifications on the homepage in the to-do action items, urgent items with deadlines and mandatory response will appear at the top and the rest will overflow to a searchable table at the bottom.

User Guides

Page 100

Welcome back, Scott Harris

Your Action Items

[Associate Professor, Intercultural Studies](#)

Department of Sociology | Faculty | Faculty Search



[Assistant Professor of Landscape Architecture](#)

Department of Architectural History | Faculty | Faculty Search



[Assign Activity Classifications for Imported Scholarly Works](#)

Activity Input | Faculty 180



[Review Possible Duplicates from Activity Imports](#)

Activity Input | Faculty 180



You have been named by a faculty member within your institution as a contributor to an intellectual or creative contribution.

Please verify.

Activity Input | Faculty 180



Additional Assigned Items

Search by keyword



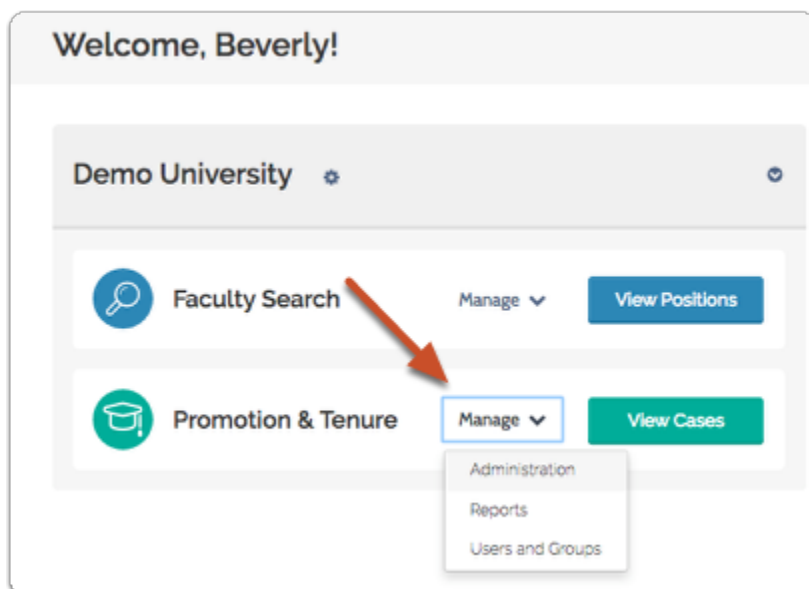
Administration Settings Page in Interfolio Review, Promotion, and Tenure

From the Administration Settings page in Interfolio Review, Promotion, & Tenure administrative users can enable or disable file downloads, enable or disable comments, create and edit forms used to collect information from candidates, establish case statuses for an institution, and set up committee voting options.

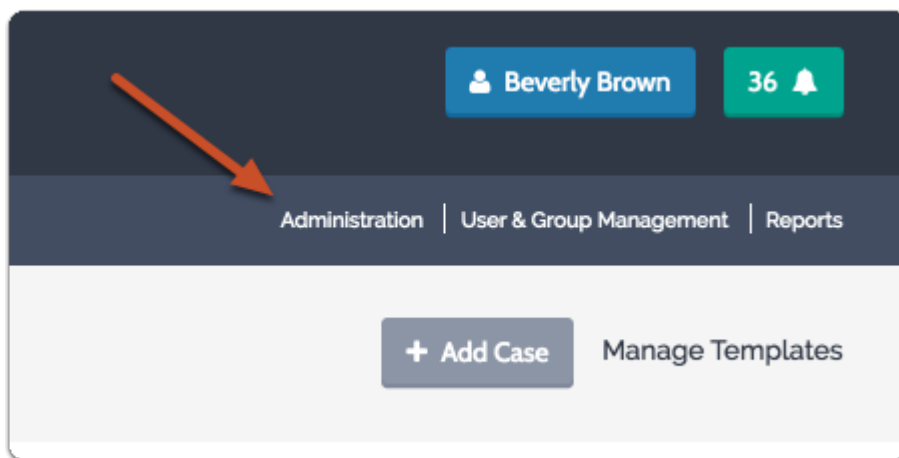
The features and functions mentioned here are explained in more depth throughout this guide in various chapters, and where appropriate, information specific to your institution has been included.

Navigate to Administration Settings

Click "Manage" on your Promotion & Tenure account dashboard and select "Administration"

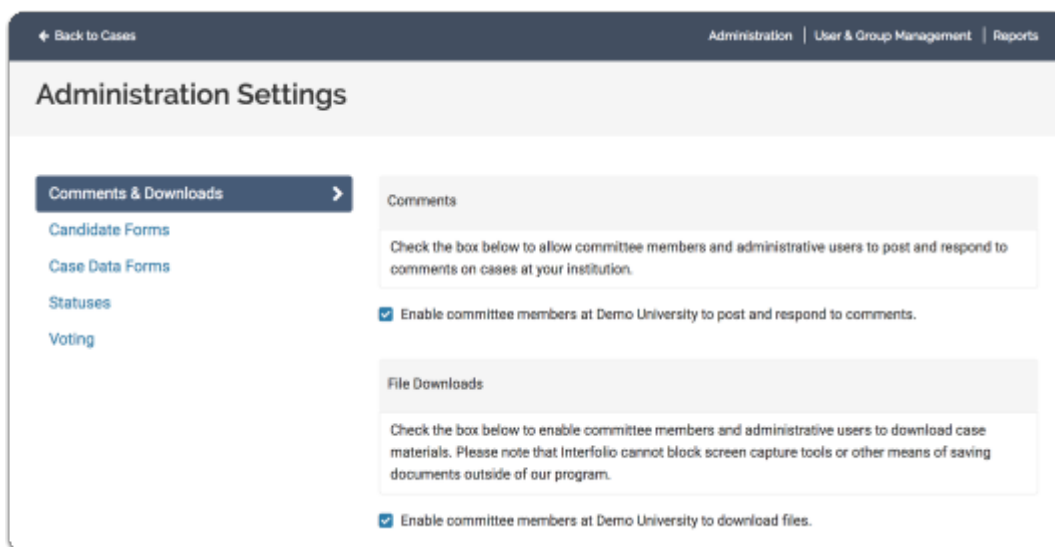


-or- Click on "Administration" from the navigation menu in the upper right of most screens in the program



Administrative Settings:

The Administration Settings page appears as a tabbed interface. By default the page opens on the "Comments & Downloads" tab.



Comments & Downloads

From the "Comments & Downloads" tab you can manage commenting and downloading privileges across an institution

1. Check the box below to allow committee members and administrative users to post and respond to comments on cases at your institution.

2. Check the box below to enable committee members and administrative users to download case materials. Please note that Interfolio cannot block screen capture tools or other means of saving documents outside of our program.

Administration Settings

Comments & Downloads

Candidate Forms

Case Data Forms

Statuses

Voting

Comments

Check the box below to allow committee members and administrative users to post and respond to comments on cases at your institution.

☒ Enable committee members at Demo University to post and respond to comments.

File Downloads

Check the box below to enable committee members and administrative users to download case materials. Please note that Interfolio cannot block screen capture tools or other means of saving documents outside of our program.

☒ Enable committee members at Demo University to download files.

Candidate Forms

From the "Candidate Forms" tab administrators can create, edit and manage candidate forms which are used to collect information directly from candidates.

Candidate Forms can be used to collect additional information directly from candidates at your institution. Forms can be created at any unit in your institution and will be available for use at all units below it in your institutional hierarchy. Administrators can attach forms to cases or templates.

Administration Settings

Comments & Downloads

Candidate Forms >

Case Data Forms

Statuses

Voting












Candidate Forms

+ Add Candidate Forms

Candidate Forms can be used to collect additional information directly from candidates at your institution. Forms can be created at any unit in your institution and will be available for use at all units below it in your institutional hierarchy. Administrators can attach forms to cases or templates.

Search Forms

Browse By All Units ▾

Form Name	Unit		
Table of Courses Taught	Demo University		
Tenure Application Form Part II	Demo University		
Application for Early Tenure	Demo University		
More Information on the Candidate	Demo University		
Promotion Review Application	Demo University		
Annual Report on Professional Activity	Demo University		

Case Data Forms

From the "Case Data Forms" tab administrators can create, edit and manage case data forms that can be used to include additional information about candidates at your institution.

Forms can be created at any unit in your institution and will be available for use at all units below it in your institutional hierarchy. Administrators can attach forms to cases or templates. Only Administrators can fill out Case Data forms - candidates will never have access to either the questions or responses.

Administration Settings

[Comments & Downloads](#)[Candidate Forms](#)[Case Data Forms](#)[Statuses](#)[Voting](#)

Case Data Forms

Add Case Data Forms

Case Data forms can be used to include additional information about candidates at your institution. Forms can be created at any unit in your institution and will be available for use at all units below it in your institutional hierarchy. Administrators can attach forms to cases or templates. Only Administrators can fill out Case Data forms - candidates will never have access to either the questions or responses.

Search Forms

Browse By All Units

Form Name	Unit		
ANNUAL SUMMARY REVIEW FORM	Demo University		
Pre-Tenure Form	Demo University		
Additional Information About Candidate	Demo University		
Information About the Candidate	Demo University		

Statuses

From the "Statuses" tab Administrators can create a list of statuses that can be applied to any case at the institution. These statuses are meant for organizational and reporting purposes, so you can easily see where individual cases currently are, along with their ultimate outcome. Committee Managers and Administrators are also able to add custom statuses at the individual case level.

Administration Settings

[Comments & Downloads](#)[Candidate Forms](#)[Case Data Forms](#)[Statuses](#)[Voting](#)

Statuses

Add Status

You can create a list of statuses, which can be applied to any case at your institution. These statuses are meant for organizational and reporting purposes, so you can easily see where individual cases currently are, along with their ultimate outcome. Committee Managers and Administrators are also able to add custom statuses at the individual case level.

Tenure with Promotion		
Tenure Granted		
Denied Tenure		
Candidate Packet Received		

Voting

From the "Voting" tab Administrators are able to collect the results of committee votes through Review, Promotion & Tenure. Admins or Committee Managers record the votes of a committee into RPT. These options are available to each committee at the institution and the results are tracked and reportable.

Administration Settings

Comments & Downloads

Candidate Forms

Case Data Forms

Statuses

Voting

Voting

Add Option

You are able to collect the results of committee votes through Review, Promotion & Tenure. To enable this feature, begin by creating your possible voting responses below. These options will be made available to each committee at your institution and the results will be tracked and reportable.

Support With Conditions	
Support	
Oppose	
Abstain	

Set Up Your Institution's Hierarchy

Administrators can set up Interfolio Review, Promotion, & Tenure to exactly reflect the real-life organizational hierarchy of an institution by creating organizational units and adding lower organizational units beneath them. For example, a university might be the highest organizational unit, and that unit would in turn contain as many lower units as necessary, such as a colleges, schools, individual departments, divisions within departments, etc. Any structure is possible and can be easily created from within the program.

Committees, templates, users, and cases can be added to a specific unit when you create them. By associating aspects of the product with a unit, you will be able to control the level of access that is associated with that entity. In general, when a form, template, user, committee, or case is assigned to the institution-level unit, it will be available to all units the entire institution. When one of these items is assigned to a lower organizational unit it will be available to that unit and all units below it. For example, a college level unit might have committees, templates, users, and cases that are in turn available to all lower organizational units such as departments, and so on.

Articles in this guide provide more detailed information on how units and your institutional hierarchy relate to forms, templates, users, and committees.

Useful Articles for Getting Started

[Add a New Administrative Unit](#)

[Edit an Existing Administrative Unit](#)

User Roles in Interfolio Review, Promotion & Tenure

In Interfolio Review, Promotion & Tenure, there are four different user roles: Institutional Administrators, Administrators, Committee Managers, and Users/Committee Members. These roles have different levels of access to materials and actions within the system.

Institutional Administrators are administrators at the highest level of an institution. They have all the powers of administrators, but can also set whether or not comments and downloads are enabled for an institution, add custom branding to the appearance of Interfolio, establish case statuses that can be used across an institution, and set up and manage committee voting at an institution.

Administrators are the users with the most power within Interfolio RPT. They are the only users who can create templates, forms, and cases for the units to which they have access. Administrators can also create users and committees. Administrators can exist at any organizational level in RPT, and have the ability to perform administrative functions for all units within their administrative hierarchy. For example, an Administrator at a university will have access to settings, cases, and committees for all units at or beneath the university level, such as colleges, departments and so on. Administrators will lose such access only when "recused" from a case at a particular workflow step.

Committee Managers have the power to move a case either backward or forward after a committee has finished reviewing. In addition, Committee Managers have communication powers within the system; they can e-mail both the candidate and committee members from within the product, and can record committee votes in the program. In order to make a user a Committee Manager, an Administrator must manually select them to serve this role.

Committee Members have access to the materials of a case and, depending on settings, may have access to some communication tools in the program. Anyone added to Interfolio RPT is automatically called a "user." Users have the most basic and restricted access in the system. Once a user is added to a committee, they are often referred to in that context as a **Committee Member**. A user must be added to a committee in order to view a candidate's packet, download documents (if allowed), and leave comments (also if allowed) on the particular case they have access to..

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Administration				
Add/edit and manage organizational units	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Add/edit and manage users	TRUE	TRUE	FALSE	FALSE
Assign users to one or more units	TRUE	TRUE	FALSE	FALSE
Name users Administrators or Committee Managers	TRUE	TRUE	FALSE	FALSE
Assign users to a committee	TRUE	TRUE	FALSE	FALSE
Create and manage candidate forms (forms to filled out BY a candidate)	TRUE	TRUE	FALSE	FALSE
Create and manage case data forms (forms ABOUT a candidate or case)	TRUE	TRUE	FALSE	FALSE
Enable/disable comments for an institution	TRUE	FALSE	FALSE	FALSE
Enable/disable downloads for an institution	TRUE	FALSE	FALSE	FALSE
Add/ edit custom branding (logo and colors)	TRUE	FALSE	FALSE	FALSE
Create/edit institution-wide custom statuses	TRUE	FALSE	FALSE	FALSE
Set up committee voting (enable feature and add institution-wide voting options)	TRUE	FALSE	FALSE	FALSE
Committees				
Create/manage standing committees	TRUE	TRUE	FALSE	FALSE
Permanently Add/remove users to/from standing committees	TRUE	TRUE	FALSE	FALSE
Create/delete case-specific (ad-hoc) committee	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Add/remove case-specific (ad-hoc) committee to or from a case	TRUE	TRUE	FALSE	FALSE
Add single reviewer (committee of 1) to a case review step	TRUE	TRUE	FALSE	FALSE
Edit name, instructions due date of a case-specific committee	TRUE	TRUE	FALSE	FALSE
Add users to, or remove users from a case-specific committee	TRUE	TRUE	TRUE	FALSE
Assign temporary members to a standing committee	TRUE	TRUE	TRUE	FALSE
Temporarily remove (recuse) members from a standing committee	TRUE	TRUE	TRUE	FALSE
Set up committee document requirements	TRUE	TRUE	TRUE	FALSE
Upload documents to satisfy committee document requirements	TRUE	TRUE	TRUE	FALSE
Record the results of a committee vote	TRUE	TRUE	TRUE	FALSE
Templates & Cases				
Create/edit/delete a template	TRUE	TRUE	FALSE	FALSE
Create/edit/ a case	TRUE	TRUE	FALSE	FALSE
Create/edit candidate packet requirements for a case	TRUE	TRUE	FALSE	FALSE
Allow candidates to add packet sections	TRUE	TRUE	FALSE	FALSE
Set up a case workflow (series of case review steps)	TRUE	TRUE	FALSE	FALSE
Move a case forward or backward	TRUE	TRUE	TRUE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Close/reopen a case	TRUE	TRUE	FALSE	FALSE
Delete a case	TRUE	FALSE	FALSE	FALSE
Recuse (temporarily remove) a standing committee member from a case review step	TRUE	TRUE	TRUE	FALSE
Recuse an administrator from one or more case review steps	TRUE	TRUE	FALSE	FALSE
Recuse an administrator from one or more case review steps in a template	TRUE	TRUE	FALSE	FALSE
Apply and remove an existing status to a case	TRUE	TRUE	TRUE	FALSE
Create and apply a custom status for particular case	TRUE	TRUE	TRUE	FALSE
Communication				
Notify a candidate of their review	TRUE	TRUE	FALSE	FALSE
Email a candidate	TRUE	TRUE	TRUE	FALSE
Email committee members	TRUE	TRUE	TRUE	FALSE
Enable/disable comments for a case review steps	TRUE	TRUE	TRUE	FALSE
Leave comments on a case	TRUE	TRUE	TRUE	TRUE
View notifications	TRUE	TRUE	TRUE	TRUE
Share materials with candidate and allow response	TRUE	TRUE	TRUE	FALSE
Share materials with committee members from committees outside of workflow	TRUE	TRUE	TRUE	FALSE
Materials & Forms				

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Create/edit a candidate form	TRUE	TRUE	FALSE	FALSE
Add a candidate form requirement to a case (attach a candidate form to a case)	TRUE	TRUE	FALSE	FALSE
Create/edit a case data form	TRUE	TRUE	FALSE	FALSE
Add a case data form requirement to a case (attach a case data form to a case)	TRUE	TRUE	FALSE	FALSE
Upload new materials to a case	TRUE	TRUE	TRUE	FALSE
Add sections to a packet that are not visible to candidate (committee documents)	TRUE	TRUE	TRUE	FALSE
Reorder packet documents	TRUE	TRUE	TRUE	FALSE
Change the document group in which materials appears	TRUE	TRUE	TRUE	FALSE
Edit title and type of documents added to a case by a committee	TRUE	TRUE	TRUE	FALSE
Delete materials added to a case by a committee (note that Committee Managers can ONLY delete materials added by themselves, not documents added by another user)	TRUE	TRUE	TRUE	FALSE
Set download privileges	TRUE	TRUE	TRUE	FALSE
Set access to materials (including external evaluations)	TRUE	TRUE	TRUE	FALSE
Allow/disallow candidate editing of packet materials	TRUE	TRUE	TRUE	FALSE
Allow candidates to add packet sections	TRUE	TRUE	FALSE	FALSE

Interfolio Promotion & Tenure User Role Capabilities:				
	Institutional Administrator	Administrator	Committee Manager	Committee Member
Request/ edit/resend external evaluation requests	TRUE	TRUE	TRUE	FALSE
Access external evaluations (depending on settings for case)	TRUE	TRUE	TRUE	TRUE
Download print documents (depending on settings for institution or document)	TRUE	TRUE	TRUE	TRUE
Read case documents and forms (access of candidate, committee, and other docs are dependent doc permission settings)	TRUE	TRUE	TRUE	TRUE
Annotate (make notes) on documents in the document viewer, and export your annotations.	TRUE	TRUE	TRUE	TRUE
Reports & Logs				
Generate and download reports including case info, forms, and voting results reports	TRUE	TRUE	FALSE	FALSE
View Case Activity logs: case movement, changes in status, and messages sent	TRUE	TRUE	FALSE	FALSE

Useful Articles for Getting Started

[Add New Users](#)

[Add Users in Bulk](#)

[Assign Units and Roles to a User](#)

[Recuse an Administrator](#)

Committees and Individual Reviewers

Committees are groups of users that can review and assess the case of a candidate at a given step of the review process. Individual reviewers can also act as a committee at a given case review step. As an administrator, you can create committees made up of any of your institutional users (including single individuals) for each step of your workflow. You can then assign committees and individuals to review a case at a certain step.

There are two roles that a user can have on a committee: Committee Member (the most basic user in the program) and Committee Manager. Committee Members have fairly limited access that pertains to reviewing a case. Committee Managers can do all of those things, plus a lot more.

Committees or individual reviewers in Interfolio RPT are always assigned to a case review step in the workflow, and each case review step must include at least one committee or individual reviewer. Multiple committees (or reviewing individuals) can be added to a case review step if more than one committee or individual needs access to the case at the same time.

Administrators in the program can also set up committee document requirements so that a committee must upload a particular document before the case can be moved forward.

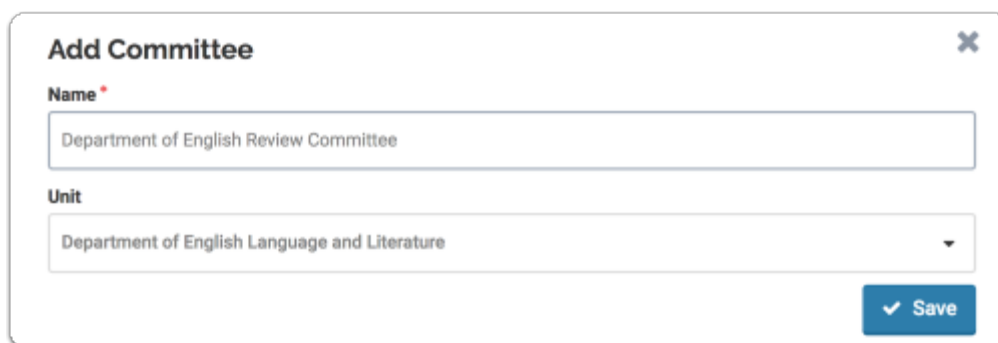
Committee Managers can record the vote of a committee at a particular workflow step and add it to the program. The results of committee voting can be viewed by members of the committee, and the voting data can be used for reporting.

There are three types of reviewing bodies that can be added to case review steps in the program; standing committees, ad-hoc committees, and individual reviewers.

Standing Committees

A standing committee is a permanent committee with a fixed annual membership that an administrator creates within Interfolio. Standing committees are a way to set up your committees once, save them to a unit, and have them available to use at any point within a workflow as a case review step. Only administrators can create a standing committee, which happens on the User & Group Management page.

When an administrator creates a new standing committee, they choose the unit at the institution that will house that committee--for instance, the "Department of English Review Committee" might be housed in the "College of Arts and Sciences" or the Department of English unit.



Ultimately, the unit determines where an administrator can use a standing committee for a template or case. For example; standing committees set at the institutional unit can be used for institution-, college-, and department-level templates. Standing committees set at the college unit can be used for college-, and department-level templates within that college. Standing committees set at the department unit can only be used for templates created in that department.

Ad hoc committees

Case-specific, ad hoc committees are committees created to be used on a case-by-case basis. Administrators are the only users allowed to create and edit case-specific committees.

Individual Reviewers

You can also assign an individual reviewer to consider a case at a given case review step. Individual reviewers can perform all the functions of a Committee Manager, including adding committee documents and moving the case forward or backward.

Recusal (Committee Members and Administrators)

With the recusal feature, administrators can accommodate conflicts of interest or specific privacy concerns during reviews down to a granular level, and document it.

Administrators can recuse themselves or other Administrators from one or more steps in a case workflow. Once recused, Administrators will no longer see the case in their case list, and will be unable to access the case when it reaches a step from which they have been recused. The case will reappear in their case list when it moves backward or forward to a step where the Administrator again has access.

Templates and Cases

About Templates

Templates are the building blocks of the Interfolio Review, Promotion & Tenure program. They allow Administrators to create a standardized, repeatable process for all review cases in their institution, colleges, schools, and departments. Templates save details like packet requirements and steps of review for the entire faculty action process.

Template Summary [← Return to Templates](#)

Dossier Visibility

This template is visible to faculty at your institution who are using Interfolio's Dossier. They can view the template title, unit, instructions and packet requirements.

[Disable Dossier Visibility](#) [Preview](#)

Template Information [✎](#)

Type
Promotion

Title
Demo University Promotion Cases

Description
A template for promotion cases at Demo University.

Creating a Template

- 1 Template Information
- 2 Candidate Requirements
- 3 Internal Case Sections
- 4 Case Review Steps
- 5 **Template Summary**

If your institution uses the Enterprise version of our Dossier product, you can establish guidelines when creating a template, and make those guidelines visible so that your faculty or staff can use them to prepare for future reviews.

Template Summary

Dossier Visibility

This template is visible to faculty at your institution who are using Interfolio's Dossier. They can view the template title, unit, instructions and packet requirements.

[Disable Dossier Visibility](#) [Preview](#)

A template is created and saved at a unit level (a college, school, or department), which limits where it can be later used. For example, when a template is assigned to the institution-level unit, it will be available to the entire institution. When a template is assigned to a college-level unit, it will be available to that college and the departments beneath it in the hierarchy. When a template is assigned to a department, it will only be available in that department.

Templates List (8)					Add Template	View Case List
Search by title or unit <input type="text" value="Search"/> 8 of 8 templates						
Title ▾	Unit ▾	Type	Dossier Visibility ⓘ			
Demo University Promotion Cases A template for promotion cases at Demo University.	Demo University	Promotion	Yes		Options ▾	
Dental School Annual Review This is for annual review cases in the dental school.	Demo University	Review	No		Options ▾	
Dental School Annual Review Workflow Use for Dental School Review	College of Dentistry		No		Options ▾	

Cases and Case Types

Once you create a template, you can use it to build individual cases without having to remember or repeat the standardized process at your institution, college, or department, however, because it is possible to modify any template to fit specific information for a candidate, you can think of a case as a customized template.

You can create multiple cases at one time, all based on a single template.

All of the components of a template can be changed or edited to fit the needs of a particular individual's review process when creating a case based on the template.

You can create 7 types of cases:

- Appointment
- Promotion
- Reappointment
- Review
- Sabbatical
- Tenure
- Other

Case Information

Return to Case

Type
Promotion

Candidate's First Name
First Name

Candidate's Last Name
Last Name

Candidate's Email
Ex.: jane.doe@university.com

Will the candidate be involved in this evaluation?

☒ Yes
☐ No

Choose "Yes" if the candidate will submit their own materials and you would like to communicate with them during the evaluation period. Note: This setting cannot be changed after this step.

Case Data Forms

Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the [Administration](#) page.

<input type="radio"/> Additional Information About Candidate	0 / 1 questions answered	Answer	X
<input type="radio"/> Pre-Tenure Form	0 / 1 questions answered	Answer	X

Add Case Data Form

Continue

Creating a Case

1 Case Information

2 Candidate Requirements

3 Internal Case Sections

4 Case Review Steps

5 Case Summary

Useful Articles for Getting Started

[Create Templates to Use as a Starting Point for New Cases](#)

[Recuse an Administrator in a Template](#)

[Create a Case Based on a Template](#)

[Set up Guidelines to Help Your Users Prepare for Upcoming Reviews](#)

Case Materials

We know reviews in higher education involve a large number of materials that have to be reviewed by different individuals and groups at different times. That's why we've made it easy to organize materials and control who can see what, at any given time.

Initially, all of the materials associated with a case are broken into four different categories: committee documents, candidate documents, external evaluations, and candidate forms. As an Administrator, you have the ability to rename the default packet sections, and add or remove sections to or from this list. You can also determine which materials are stored in which category and reorder materials within a material group.

For materials within one of those categories, you can control who can see and download each individual file. If you only want Administrators to be able to read evaluations from external scholars, but still want everyone on the committee to be able to see the candidate's publications then you can create those settings. Or maybe, you want to allow the entire committee to read just one specific external evaluation and not give them access to the other letters? That's possible, too. Users can also read and annotate materials from within the browser window. Annotations are private notes only visible to the user leaves them.

Administrators and Committee Managers can add packet sections and materials to the case that are not visible to the candidate. For instance, Admins and Committee Managers can add sections and upload materials for internal and/or committee use such as committee notes, meeting notes, final recommendations, or other materials being produced at the institution or received from outside sources. Changes made to the packet are saved and passed forward to the next committee, which has the same abilities to create and edit packet sections and materials. If a case gets sent back a step, it will retain any changes that have been made to the packet.

You can also share committee materials with candidates and allow them to submit a response or rebuttal to the shared material. This is especially useful when sharing the recommendation of a committee and allowing the candidate to respond or rebut the decision. It is also possible to share case materials with all of the members of other committees in the workflow of a case (besides the current committee), and with other P&T users.

Remember that anything uploaded by a committee is not seen by a candidate, and Committee Members are not able to add, reorder, or edit sections and materials.

Useful Articles for Getting Started

[Enable or Disable File Downloads for an Institution](#)

[Adding and Managing Case Materials](#)

[Set Download Privileges and Access to Case Materials](#)

[Share Case Materials with a Candidate and Allow Candidate Response/Rebuttal](#)

[Share Case Materials with Committee Members](#)

Workflow

In Interfolio Review, Promotion, & Tenure, each step in a workflow is called a "case review step." You can create case review steps when you're making a template or a case. At each case review step, different people or committees have access to the committee documents, candidate materials, evaluations, forms, and comments that make up the case. Multiple committees (or single individuals) can be added to a case review step and can access a case at the same time. Once a case is being reviewed, Administrators and Committee Managers of certain committees assigned to the case review step can move the case forward or backward to different stages of the case review workflow.

Administrators and Committee Managers can also set "committee document requirements" so that a committee must upload a certain document before the case can be moved forward to the next step.

As a case moves through the case review steps, some Administrators may need to manage only the components they should oversee--and nothing more. That's why "administrator recusal" is a particularly helpful component of Interfolio Review, Promotion, & Tenure: it allows administrative users to invite other Administrators into a case, or dismiss Administrators when their job is done, so you can be sure to designate the appropriate person to oversee each step at any stage of the workflow process.

Once a case has been moved backward or forward, Administrators and Committee Managers can also choose to send an optional email message to members of the committee to notify them that they will be gaining access with that move. At any moment during the review process, Administrators and Committee managers can also e-mail the Candidate to request any additional information or to update them on the status of the review. Throughout every stage of the review process, you can be sure everyone stays in the loop.

Useful Articles for Getting Started

[Move a Case Forward or Backward](#)

[Edit Review Steps for a Case](#)

[Recuse an Administrator](#)

[Set Up Committee Document Requirements](#)

Communication

Interfolio Promotion & Tenure includes features that allow Administrators to communicate with both candidate and committees at any point in the review process.

It's simple to communicate instructions to the candidate while creating a case. Each case includes a "Candidate Instructions" field where you can write notes on the submission process. If there are a standard set of instructions or guidelines that you typically provide each candidate with when they are up for review, you can pre-populate these instructions when you're creating a template; later, when you access the template for a particular case you can customize the instructions for the individual candidate.

As an Administrator or Committee Manager, if you need to communicate with your candidate prior to submission (for instance, to ask for an additional document), or your committee during review (for instance, to remind them of a deadline), you can do so from within the product by finding and clicking on the mail icon any time you're in a case.

You can share materials with the candidate, including committee documents, and allow the candidate to respond to the shared materials. You can also share case materials with all of the members of other committees in the workflow of a case (besides the current committee), and with other P&T users.

When sending an email from Interfolio Review, Promotion, & Tenure, you have the option of choosing the name of the sender and the "reply-to" address. You might choose to have the email come from your institution, for instance, and the "reply-to" address be your own, so that a Committee Member, candidate, or external evaluator who receives the email can simply reply back to you if they have a question. Once you've sent out messages to either your candidate or your committees, you'll be able to retrieve a log of all messages sent within the program.

Communication in the product does not just happen via email, however. A notification center (the bell icon in the upper right) shows when announcements are made, deadlines approach, candidates are notified, comments are made, and cases are made available for review.

Useful Articles for Getting Started

[Notify a Candidate of Their Review](#)

[Email a Candidate](#)

[Email a Committee](#)

[Enable or Disable Comments for an Institution](#)

[Enable or Disable Comments for a Case](#)

[Leave Comments on a Case](#)

Reporting

Interfolio Promotion and Tenure allows users to build reports around activities like packet movement (what committees have seen a candidate's packet and who sent it for review?), messages (what communication has been sent to committees, candidates, and evaluators, when, and by whom?), and cases (what are all the committees or candidates that have participated in Review Promotion & Tenure cases this year?).

The reports section of Interfolio P&T is divided into three categories: "Case Info," "Forms," and "Voting Results." A "Case Info" report generates a report on all the information gathered at individual case levels; for instance, let's say you want to run a report that lists all the cases at your institution by name and the stage of review. A "Case Info" report will easily generate this report for you. Based on the custom forms you have created (questionnaires that are customizable at a departmental, college, or institutional level), you can also run a "Forms" report based on the answers to the questions you created.

In addition, Administrators can run a "Voting Results" report that lists the results for all committees voting on a particular case in a particular administrative unit such as a university, school or department.

Finally, all case activities are recorded in a case activity log for your review.

Whatever information you need, our reporting feature allows you to have analytical data and oversight about the review processes occurring at your institution.

Useful Articles for Getting Started

[Generate and Download Reports](#)

[Run a Report on the Voting Results of a Case](#)

[View the Case Activity Log](#)

Forms

There are two kinds of forms in Interfolio Promotion & Tenure; candidate forms, and case data forms. Candidate forms are designed to collect information from a candidate and are completed by the candidate in the process of completing their packet of materials. A Case data form is designed to attach pertinent information about the candidate to a case and can only be filled out by an Administrator in the program. Both types of forms are completely customizable and can be added to both a template or a case. The benefit of gathering data from or about the applicant on a custom form is that the information collected can easily be generated into a report which you can view in your browser and export as a CSV file for use in a spreadsheet program.

When creating a candidate form, you have the option to make a question required. That means that the candidate will not be able to submit his/her application without answering the question on the form. If the question is not required, the candidate *can* submit his/her case without answering the question. You can also require questions on case data forms, but these are accessed from the Case page of a candidate, and are not part of the candidate submitting their case. In fact, candidates will never see the questions or answers on a case data form.

When creating your form, you will be asked to house the form within a unit. Attaching a form to a unit controls which units can use those forms for their cases or templates. For instance, if you create a form at the institutional level, any unit below it (colleges or departments) can access that form while creating a case. If you create a form at the college level, only that college and the departments within that college can access that form. If you create a form at the departmental level, then the only unit that can access that form when creating a case is that department.

Useful Articles for Getting Started

[Create a New Candidate Form](#)

[Create a New Case Data Form](#)

[Edit an Existing Form](#)

[Delete a Form Template](#)

External Evaluations

External evaluations are an integral component of the review process, so we've incorporated tools that streamline this process and make it easy for Administrators to request evaluations from scholars that are outside of the committee, or even outside of your institution.

An Administrator or Committee Manager in Interfolio P&T can request evaluations from one or more external evaluators from the case page of a candidate. These requests comes in the form of an email; you'll be able to customize the subject and message of the email, set a due date and attach files from the case to help the evaluator complete their review.

Importantly, you can also set who from the committee (the Administrator only, the Committee Manager, or the entire committee) can see the evaluation once it is received.

Note that you can send requests to multiple evaluators using a single form (which will include a message, all attached files, and due dates etc.).

Also, if you'd like to use Interfolio P&T to solicit names of potential external evaluators from the candidate up for review, you can do so with a custom form that you create for the candidate to fill out, or with a required document that you ask the candidate to upload themselves. The candidate will never be notified or be able to see the external letter.

Useful Articles for Getting Started

[Create a New External Evaluation Request](#)

[Edit & Resend an External Evaluation Request](#)

Download PDF to Admin Guide to Interfolio Review, Promotion & Tenure

Click here to download and print a PDF of the [Administrator's Guide to Interfolio Promotion & Tenure](#).

Guides for Candidates, Committee Members, Committee Managers, and External Evaluators

Committee Manager's Guide to Interfolio Review, Promotion, and Tenure

Welcome to Interfolio Promotion and Tenure! Review, Promotion, & Tenure allows you and your committee to deliberate and make important decisions about promotions in one easy and secure location. You can easily adapt your existing promotion or tenure workflow into the application to make your experience more efficient and less paper-driven for yourself, your colleagues, and your candidates.

This is a guide to assist you in your role as a Committee Manager. As a Committee Manager, you have many more responsibilities and privileges in the product than the average committee member; at the same time, you are slightly limited within your organization when it comes to certain aspects of the product, such as creating institutional settings. Below, you'll find guidance for using Promotion and Tenure for every step of your review process including viewing a case, editing documents, communicating with your committee and candidate, and moving a case forward or backwards. And remember: every action within Promotion & Tenure is documented with a step-by-step guide in our [online help center](#).

Useful Articles for Getting Started

Basics

[User Roles in Promotion & Tenure](#)

[Interfolio Review, Promotion, & Tenure Best Practices for Managing Reviews](#)

Reviewing and Managing Cases

[Access Your Case List](#)

[Access an Individual Case Page](#)

[Allow or Disallow Candidate Editing of Packet Materials](#)

[Move a Case Forward or Backward](#)

[Record the Results of a Committee Vote](#)

Communication

[Email a Candidate](#)

[Email a Committee](#)

[Enable or Disable Comments for a Case](#)

[Add, View, and Delete Comments on a Case](#)

[Share Case Materials with a Candidate and Allow Candidate Response/Rebuttal](#)

[Share Case Materials with Committee Members](#)

Documents

[Upload New Documents](#)

[Upload Required Committee Documents](#)

[Download Documents](#)

[Set Download Privileges and Access to Documents](#)

[Read and Annotate Packet Documents Using the Document Viewer](#)

External Evaluations

[Create a New External Evaluation Request](#)

[Edit & Resend an External Evaluation Request](#)

Best Practices for Managing Reviews With Interfolio Review, Promotion, and Tenure

If you're managing a promotion, tenure, or review case this year, here are a few best practices to keep in mind:

1. **Creating committees and allowing them to review cases:** [Committees](#) are groups of users that can review and assess the case of a candidate at a given step of the review process. As an administrator, you can [create committees](#) made up of any of your institutional users for each [step of your workflow](#). Remember, in order for your committee members to have access to a case, the [committee must be assigned to a review step](#) in the case workflow.

Because we know that faculty promotion and tenure cases contain sensitive confidential information, we have deliberately designed Interfolio's workflow feature to ensure that a committee will only have access to the packet materials while a case is their specific workflow step.

2. **Communicating with your candidates:** When working with candidates, there are several ways to send messages and alert them of the review process. First, in order to get your case initiated and allow the candidate the opportunity to work on their packet materials, you'll need to [notify the candidate](#). Then, at any point, if you need your candidates to make changes to their packet materials (ex: maybe you would like for them to update their CV), you can [enable candidate editing](#) per section of their packet and send [emails to the candidate](#) to let them know to make your requested updates.
3. **Communicating with your committees:** Committee Managers and Administrators can [email a review committee](#) and [collaborate](#) within a specific case. We keep a record of all [communications](#) to candidates and committee members and [case movements](#) so administrators will always have transparency while managing their cases.
4. **Requesting external evaluations:** We've incorporated tools that streamline the external evaluation process to make it easy for Administrators to [request evaluations](#) or [resend previous requests](#) from external scholars. Learn more about the external evaluator experience [here](#). Remember if you add a due date to an external evaluation request, it will be a hard deadline and letter writers will not be able to submit a letter after that date. If necessary, you'll be able to clear or edit a due date while resending a request.
5. **Adding and managing committee documents:** After a candidate submits their packet and the packet is with one or more committees for review, Administrators and Committee Managers who have access to the case can [add committee-specific sections and documents to the packet](#). Any document uploaded to a case by an Administrator or Committee Manager will be invisible to the candidate. These users will also have the opportunity to [manage document permissions](#) and [add, reorder, or edit packet materials](#). Remember, only the candidate will have the opportunity to remove the materials that they uploaded and submitted to their case. In addition, Admins can require that a committee upload specific

documents before the case can be moved forward. See here for more information on [uploading required committee documents](#).

Additionally, we have guide books for every user type where all relevant articles for your role are sourced for you:

1. [Committee Manager's Guide to Review, Promotion & Tenure](#)
2. [Committee Member's \(Evaluator's\) Guide to Interfolio Review, Promotion & Tenure](#)
3. [Candidate's Guide to Interfolio P&T](#)
4. [External Evaluator's Guide to Interfolio P&T](#)

Still Stuck?

We're here to help! Anyone can contact our Scholar Services team at help@interfolio.com or (877) 997-8807 Monday- Friday, 9:00-6:00 PM ET.

Committee Member's Guide to Interfolio Review, Promotion, and Tenure

If you have been added to a committee for promotion, tenure, or review at an institution that uses Interfolio Review, Promotion, & Tenure, you can securely and easily participate in the case review process online.

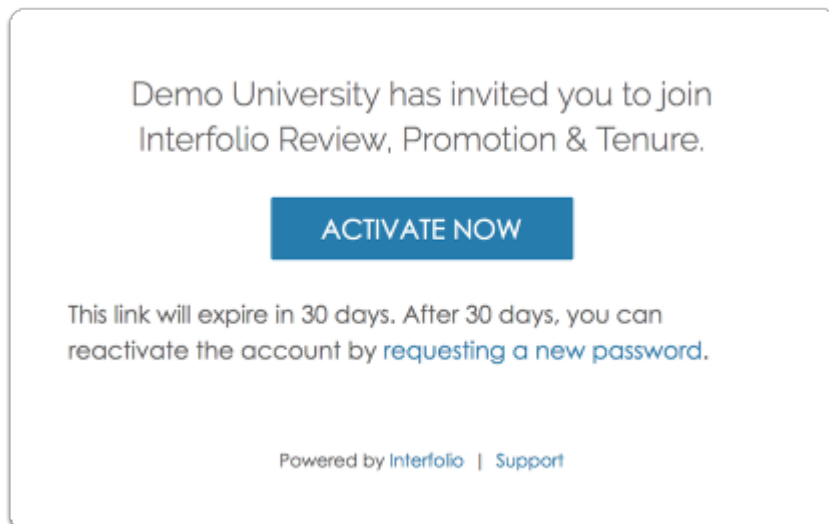
An Administrator at the institution conducting the review will manage the case and candidate packet. You will receive an email when the case is available for your committee to begin review.

Once you activate your free account and log in, you will be able to access any case to which you have been added as a committee member.

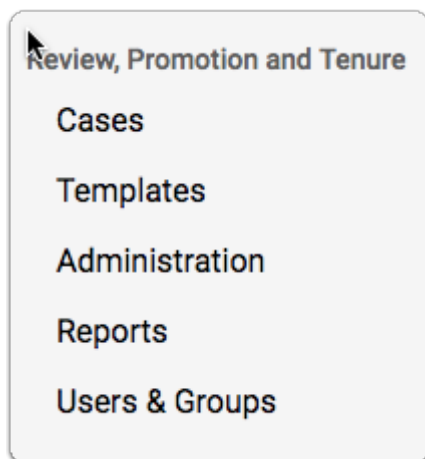
The video below will help you get started quickly. Check the article for more a detailed explanation on getting started and using RPT to evaluate cases.

Getting Started:

You will receive notification when you are added as a user to Review, Promotion & Tenure



Log in and click "Cases" on your Review, Promotion & Tenure navigation bar



You will see a list of cases that are available to you:

Demo University >

Case List

Create Case

▼

Q Search cases

Filter

20 of 20 cases

<input type="checkbox"/>	Name	Type	Template Name	Status
<input type="checkbox"/>	New Candidate Department of Civil Engineering	Other	Institution Template Test	
Case Created: Waiting for an administrator to add case review steps				
<input type="checkbox"/>	New Candidate Department of Mathematics		School of Architecture: Associate to Full Professor	Tenure Granted
Case Created: Waiting for an administrator to send the case forward				
<input type="checkbox"/>	Michael Bishop Department of Architectural History	Promotion	School of Architecture: Associate to Full Professor	Under Review
Step 2 of 3: Administrator Review				

Click the name of the candidate to view case materials

21 of 21 cases

☐

Name ▾

Type ▾

Template Name ▾

☐

[Rita A. Bookman](#)
Demo University

Promotion

Custom Workflow

Step 2 of 2: Provost Review | Jan 21, 2017 ⚠ Required Documents

☐

[Edward Angerer](#)
Historical Musicology

Appointment

Anthropology Promot

Step 1 of 3: Music History Promotion Committee

i

Clicking on the name of the candidate will direct you to the Case page, where you can access materials and forms only available to committee members, and view and download materials submitted by a candidate.

Demo University > Cases >

Michael Bishop

Unit
Department of Architectural History

Status
● Under Review [change](#)

Reviewing as
Scott Harris

[Send Case](#) [Case Options](#)

[Case Materials](#) [Case Details](#)

Search Case Materials [Read Case](#)

▼ **Candidate Documents** [Add File](#)

Professional and Civic Service Record Form

▼ **Committee Documents** [Add File](#) [Edit](#)

☐ CV 2013 MUSIC (1) [Download](#) Feb 27, 2018 at 2:31 PM [Edit](#)

☐ Annual Self Assessment [Download](#) Mar 13, 2018 at 9:50 AM [Edit](#)

▼ **External Evaluations** [Request Evaluation](#) [Add File](#)

☐ Evaluation from Tom Turkey [Download](#) Sent Mar 13, 2018 at 9:53 AM [Edit](#)

Navigate to the case you want to edit

You will see a tabbed interface:

Case Materials

The Case Materials tab is divided into sections, and from here you can access materials uploaded by committees as well as candidate materials. You may also see external evaluations if your institution is using our feature for requesting and collecting external evaluations.

[Demo University](#) > [Cases](#) >

Fred Buddle

Unit

Department of Architectural History

Status

Tenure Granted

[change](#)

Reviewing as

Case is Being Created

Send Case

Case Options

Case Materials

Case Details

Q Search Case Materials

> Committee Documents

+ Add File

> Candidate Documents

+ Add File

> External Evaluations

Request Evaluation

+ Add File

Case Details

The Case Details tab is where you can view the other members of your committee, and if enabled, view comments from other committee members and leave comments on the case.

If a committee vote has taken place and the results have been recorded by the Committee Manager or Administrator, you can also see those results.

[Demo University](#) > [Cases](#) >

Fred Buddle

Unit

Department of Architectural History

Status

Tenure Granted

[change](#)

Reviewing as

Case is Being Created

Send Case

Case Options

Case Materials

Case Details

Committee Members: 2

Email

Edit

Voting

Scott Harris

scott.harris@sharklasers.com

Michelle Scott

ms@demo.edu

Accessing Materials:



On the individual case page, you can read or download documents that were submitted by the candidate, committee members, and external evaluators.

If the institution administering the case has elected not to allow downloading, the Download option will not be available. Some individual documents may also have downloading restricted.

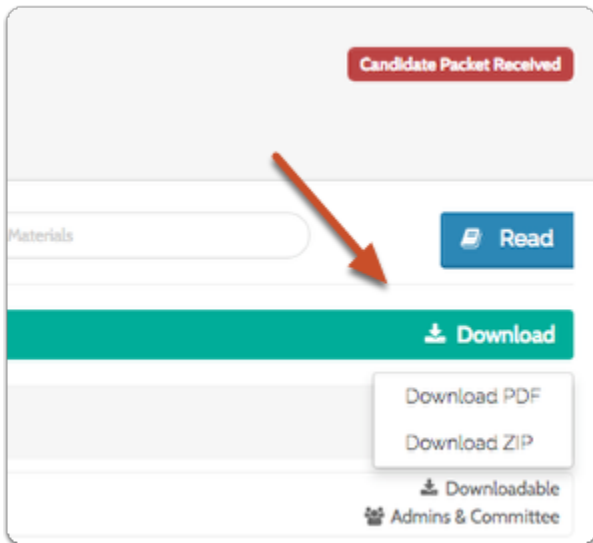
Select the read button to view materials, or click the select button next to the relevant files to download



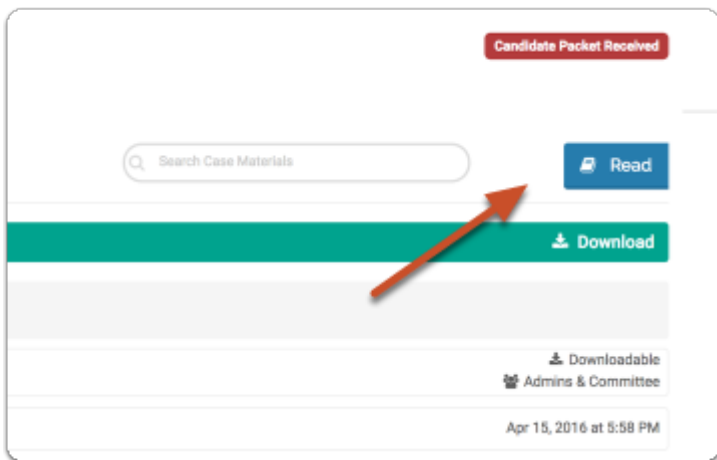
Click "Select All" above the list to select all materials in the list.

The screenshot displays the 'James Aaron' case page for 'Ethnomusicology'. At the top right, a red banner indicates 'Candidate Packet Received'. Below the case name, there are tabs for 'Case Materials' and 'Case Details'. The page shows 'Reviewing as: CCS Department Review' and a search bar for 'Search Case Materials'. A blue 'Read' button is visible. A green bar contains a 'Select All' button and a 'Download' button. Under the 'Committee Documents' section, there are two items: 'Unit Actions Report Committee Report' (checked) and 'Chair's Report' (unchecked). To the right of these items, it says 'Downloadable Admins & Committee' and 'Apr 15, 2016 at 5:58 PM'.

You can choose to download a PDF or Zip file of all selected materials



Clicking “Read” above the document list and to the right of the page will open all accessible case materials in the document viewer



i The document viewer will display the contents of the packet, organized by section. You can collapse and expand packet sections in the Case Documents list on the left.

💡 You can also click on the title of a document to open that specific document in the document viewer.

Edward Angerer

Return to Case

Download

PacketAnnotations

COMMITTEE DOCUMENTS

Chair's Report

CANDIDATE DOCUMENTS


STUDENT EVALUATIONS

EXTERNAL EVALUATIONS

Drawing on your own first-hand observations as well as other data, evaluate the candidate's classroom teaching. Provide informative student evaluations of the candidate's courses (only one set of copies is needed). Copies of letters from students concerning the candidate's teaching should be attached to this report. Discuss the candidate's direction and supervision of theses and dissertations. Comment on the quality of student work which the candidate supervised. Evaluate the candidate's contributions in undergraduate advising, sponsorship of student organizations, or other work with students outside of the classroom. Comment on new methods and courses developed by the candidate.

Previous Material 2 / 19 Next Material

You can make notes on materials as you review. The annotations you make will appear on their own tab and can be exported.

 Annotations are private and can only be viewed by you.

Edward Angerer

Annotations

Search

CV 2013 MUSIC.docx Oct 26, 2016 at 8:23 PM

These are from a joint appointment .

CV 2013 MUSIC.docx Oct 26, 2016 at 8:24 PM

Bob was concerned about the service record. Need more information.

- ENWR 110: Acceler
- ENWR 110: Acceler
- MUSI 207B-1: The I
- ENWR 110: Acceler
- ENWR 110: Acceler

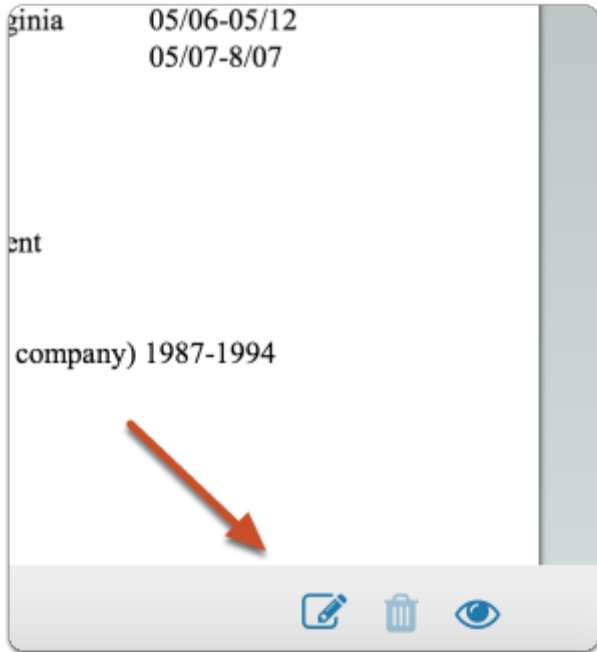
Graduate Teaching Assi

- MUSI 207: Roots M
- EDIS 287: Study Ski
- MUSI 208: African /
- MUSI 207: Roots M
- MUSI 212: The Histo
- MUSI 207: Roots M
- MUSI 212: The Histo
- MUSI 212: The Histo
- MUSI 212: The Histo
- MUSI 212: The Histo
- MUSI 212: The Histo

Guest Lectures and Sub

Adding Annotations:

Annotations are added from the lower right corner of the viewer



Click the "view" icon to toggle on or off the display of annotations

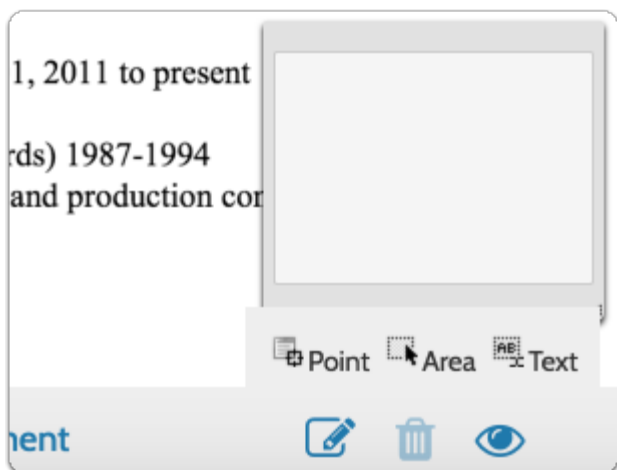


Click the "note" icon to add an annotation on the currently displayed document

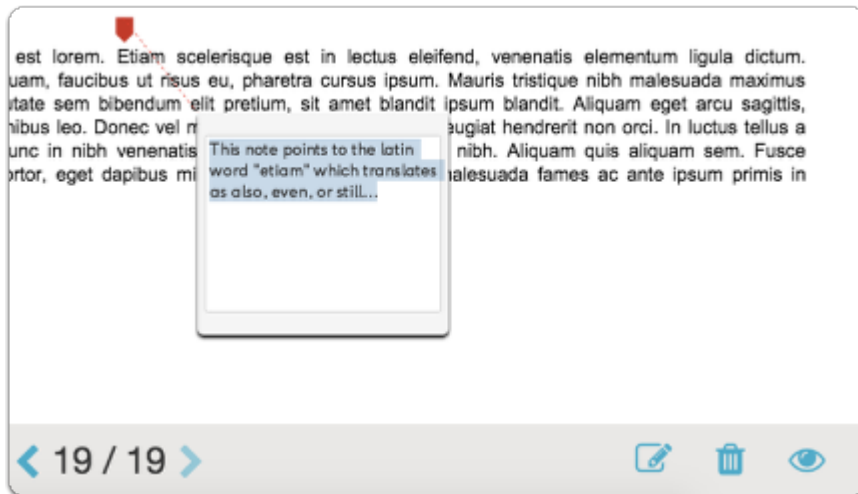


After clicking the "note" icon, select the type of annotation you want to create:

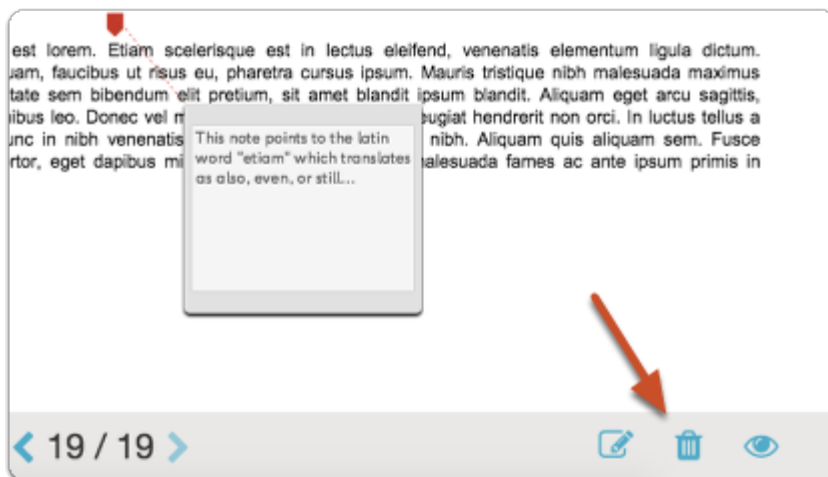
- Make no selection to add a simple "stickie" note to the document
- "Point" adds a note with an arrow pointing to a particular point in the document
- "Area" adds a note about a selected area
- "Text" adds a note about highlighted




To edit a note you've added, simply click into the text field



To delete a note, click into the text field and then click the trash icon



Committee Voting:

-  Administrators and Committee Managers can record committee votes into Interfolio P&T. Committee members can view the results of a committee vote from the "Committee Details" tab of the Case page.

Click "Voting" to see the results of a committee vote

James Aaron

Ethnomusicology

Case Materials

Case Details

Candidate Packet Received

Reviewing as: CCS Department Review

Voting

Committee Members: 5

Conversation

Required Documents

Missing

All required documents must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

Committee Review Summary

Add

VIEW ALL | MINE | OTHERS

CN Chelsea Norman (you)

Please click on this

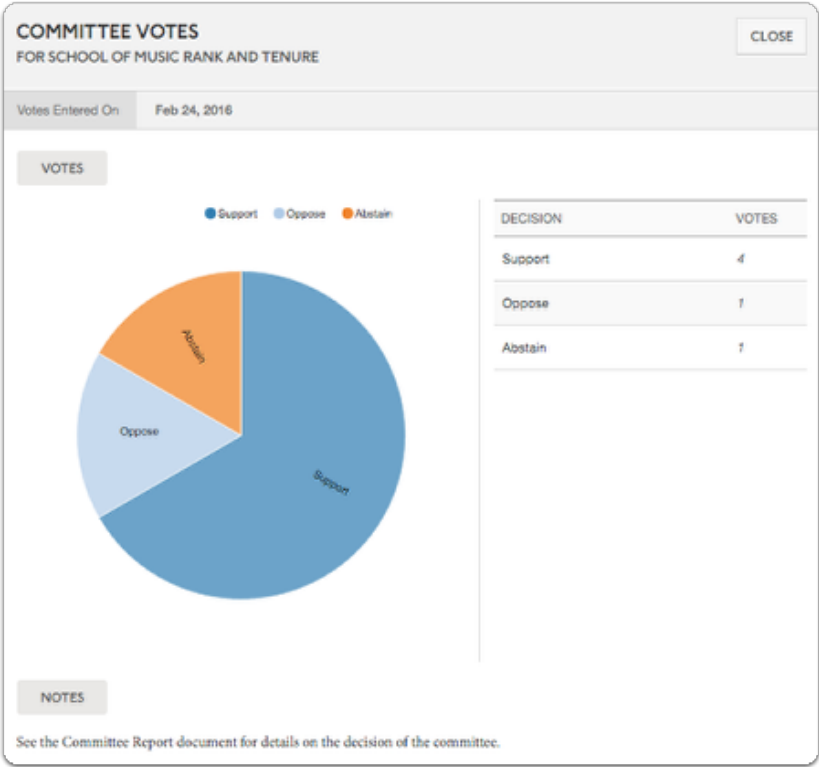
CN Chelsea Norman (you)

I haven't heard yet.

EC Erin Combeola

Chelsea, Have you heard from S...

i Voting results are represented with a circle graph displaying the overall results and the number of each vote cast.



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.

In this Article:

- [How do I activate my candidate account? What does the notification email look like?](#)
- [How to view past packets](#)
- [How to view packet requirements](#)
- [How to add files to your packet](#)
- [How to preview your packet before submitting](#)
- [How to view files that are shared with you by the committee in RPT](#)
- [How to respond to shared Files](#)

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



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




Tip:

You can view past packets in the section below the Active Packets

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 3rd Year Review (Tenure Track)		–	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

Committee Files

Rita A. Bookman

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.

The screenshot displays two sections of a user interface. The top section is titled 'Candidate Documents' with a due date of '2018-11-17'. It features a progress indicator (a circle with a green segment) and a 'NOT YET SUBMITTED' button. Below the title, there is a list of requirements: 'CV 1 Required | 0 Added', 'Tenure Statement 1 Required | 0 Added', 'Publications 1 Required | 0 Added', 'Tenure Application Form Part II', and 'Additional Documents 0 Added'. A 'View' link is visible next to the first item. The bottom section is titled 'Teaching Portfolio' with a due date of '2016-05-26'. It also has a progress indicator and a 'NOT YET SUBMITTED' button. The requirements listed are 'Teaching Statement 1 Required | 0 Added' and 'Peer Observer's Report 1 Required | 0 Added', with a 'View' link next to the first item.

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.

The screenshot shows a user profile for 'Emily Bern'. At the top, there is a header with the name 'Emily Bern'. Below the header, there is a button labeled '+ Add Section' with a red arrow pointing to it. Underneath the button, there is a section titled 'Editable Sections'. The first section is 'Grants and Awards', which is marked as 'NOT YET SUBMITTED'. Below this section, there is a status bar showing '0 / 1 REQUIRED'. The 'Grants and Awards' section is expanded, showing a list of items: 'List of Grants and Awards' (1 Required) and 'Additional Documents' (Add File). Each item has an 'Add File' button next to it.

Add files to satisfy packet requirements:

Click "Work on Packet"

This will open a page where you can upload files to satisfy packet requirements.

Overview Committee Files

Rita A. Bookman

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 "Add File" to upload materials to your packet

Emily Bern

[+ Add Section](#)

Editable Sections

Grants and Awards NOT YET SUBMITTED

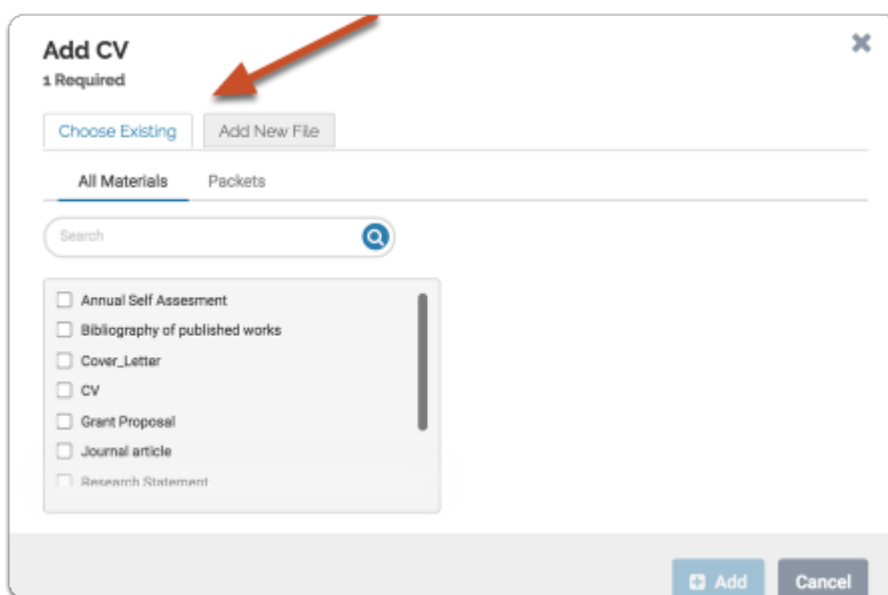
☐ INCOMPLETE 0 / 1 REQUIRED

- ☐ List of Grants and Awards 1 Required [+ Add File](#)
- ☐ Additional Documents [+ Add File](#)

! 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.

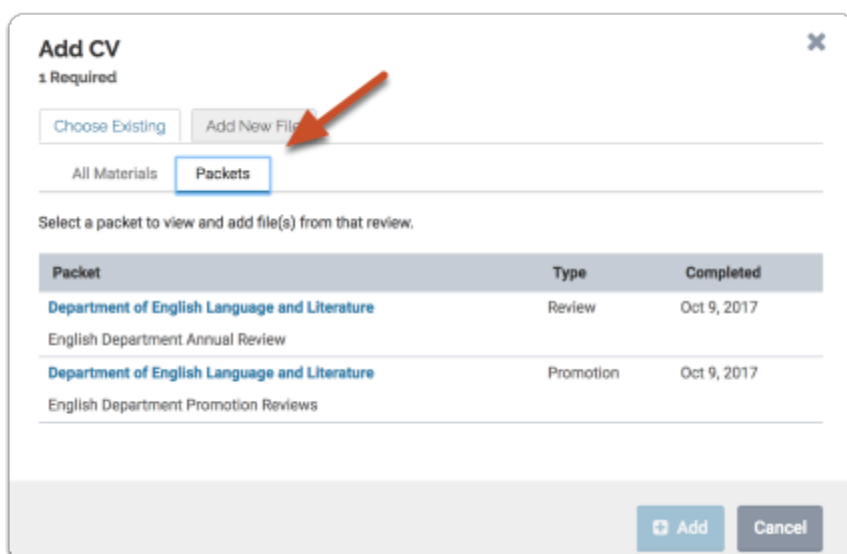
By default, the name that will appear to reviewers is the name of the file as you upload it, but you can also edit the title of a file after adding it to your packet.

💡 You can upload multiple files at one time.



The screenshot shows a modal window titled "Add CV" with a sub-header "1 Required". It has two buttons: "Choose Existing" and "Add New File". A red arrow points to the "Add New File" button. Below the buttons are two tabs: "All Materials" (selected) and "Packets". Under the "All Materials" tab, there is a search bar and a list of materials with checkboxes: Annual Self Assessment, Bibliography of published works, Cover Letter, CV, Grant Proposal, Journal article, and Research Statement. At the bottom right are "Add" and "Cancel" buttons.

You can also add files from packets you have previously submitted:

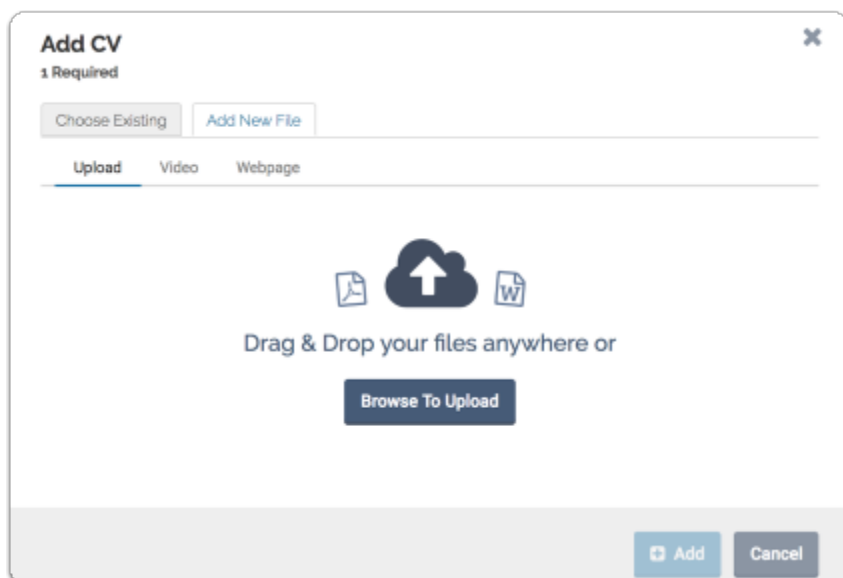


The screenshot shows the same "Add CV" modal window, but the "Packets" tab is selected. A red arrow points to the "Add New File" button. Below the tabs, it says "Select a packet to view and add file(s) from that review." and displays a table of packets.

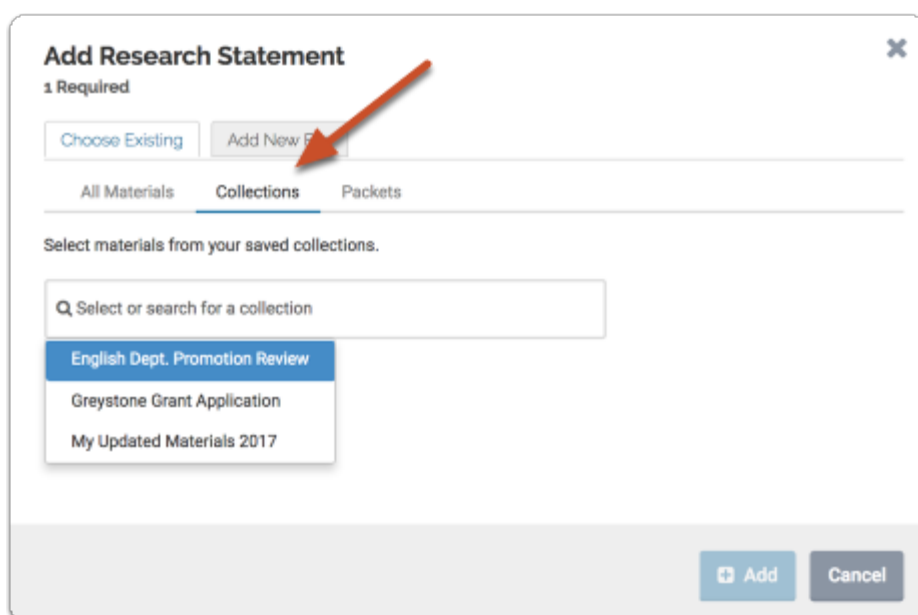
Packet	Type	Completed
Department of English Language and Literature English Department Annual Review	Review	Oct 9, 2017
Department of English Language and Literature English Department Promotion Reviews	Promotion	Oct 9, 2017

At the bottom right are "Add" and "Cancel" buttons.

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.



Add CV
1 Required

Choose Existing

Add New File

All Materials

Collections

Packets

Select materials from your saved collections.

English Dept. Promotion Review

Search

Filter

☐ All
☒ CV
☐ Research Statement
☐ Statement of Teaching Philosophy update

Title: CV

Type: C.V.

Status: Received , Oct 7, 2017 at 9:46 PM

ID Number: 278096A611

Tags:

Add

Cancel

Add Publications
3 Required

Upload

Video

Webpage

Tenure sample Cover Page

SUCCESS

Cover Letter

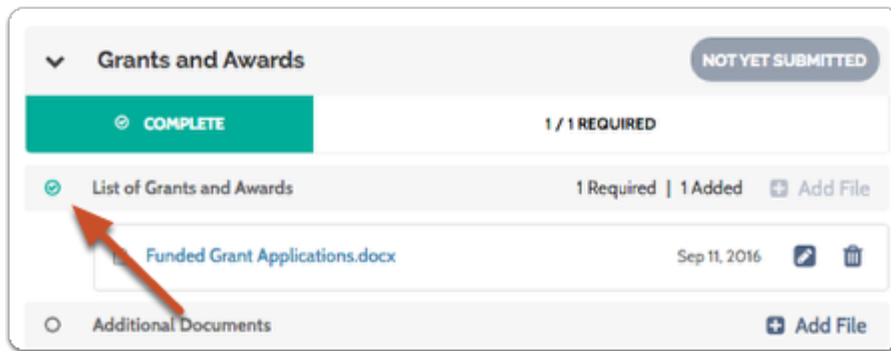
SUCCESS

Add

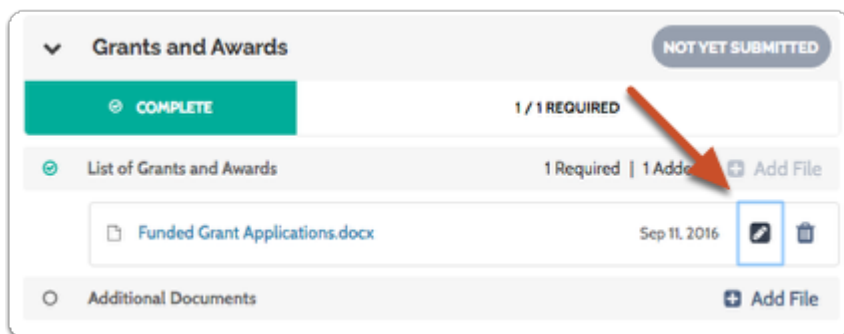
Cancel

Look for the green check mark when you have satisfied a requirement

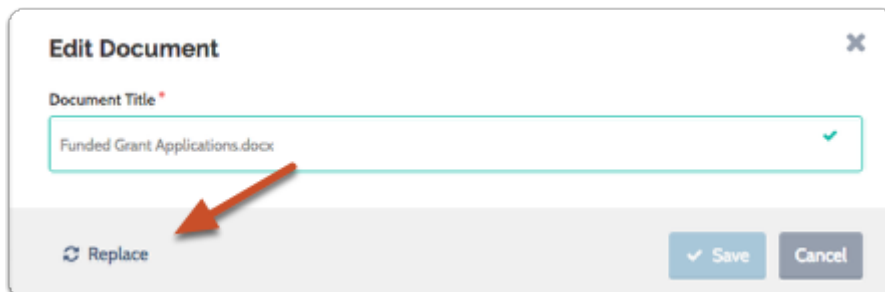
When a requirement is satisfied it appears with a green check mark. Likewise, completed sections are marked "Complete."



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

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

✓ 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

Edit

Select which sections of your packet you want to submit

Only sections with completed requirements will appear in the list.

Review & Submit

Only sections with completed requirements will appear in this list for you to submit. Once you submit a section, you will not be able to edit the documents and forms within it.

SECTION INFORMATION

STATUS

COMPLETENESS

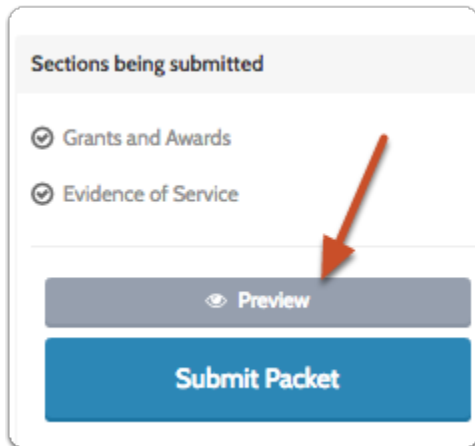
Grants and Awards

NOT YET SUBMITTED

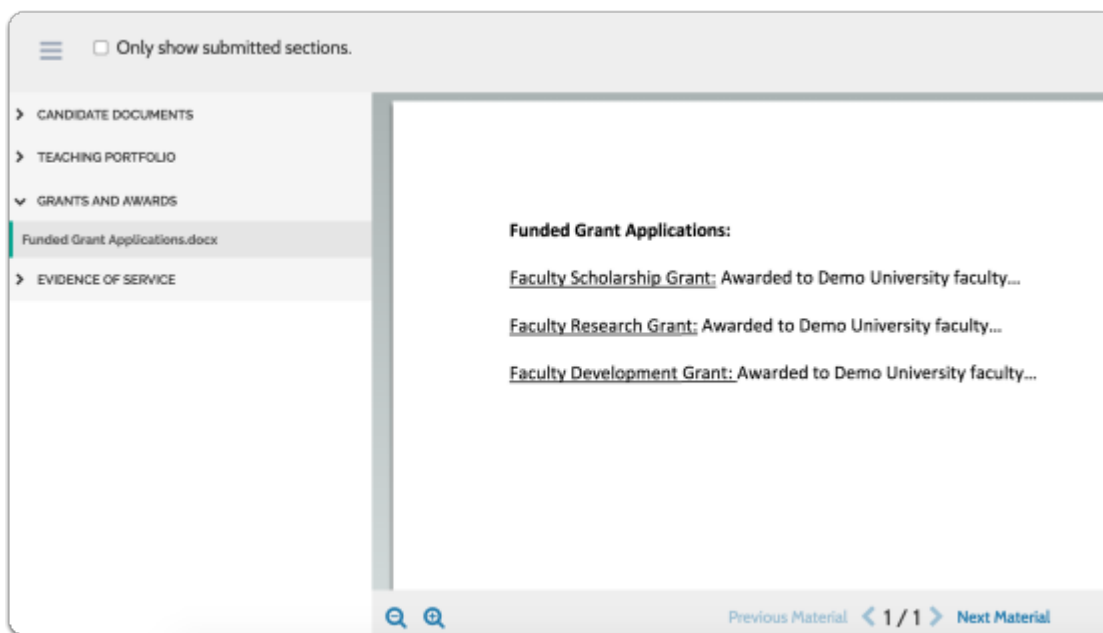
Evidence of Service

NOT YET SUBMITTED

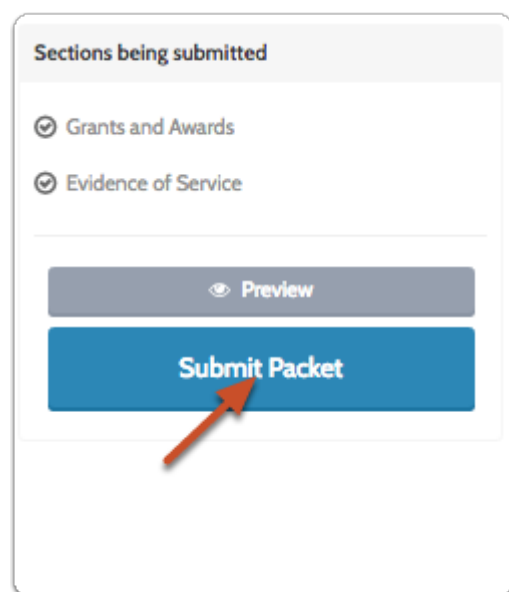
You can preview your packet before submitting:



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



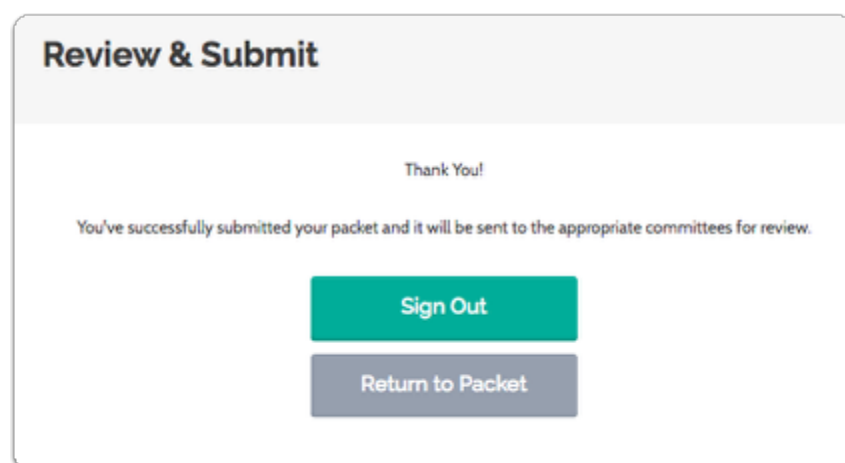
Sections being submitted

- ✓ Grants and Awards
- ✓ Evidence of Service

Preview

Submit Packet

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



Review & Submit

Thank You!

You've successfully submitted your packet and it will be sent to the appropriate committees for review.

Sign Out

Return to Packet

Locked Sections

- i** 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.

Locked Sections ?

▼

Candidate Documents

Due: Nov 17, 2018

NOT YET SUBMITTED

🔒

○ INCOMPLETE

0 / 4 REQUIRED

○ CV

1 Required

+ Add File

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.

Beverly Brown has shared files with you.

VIEW FILES

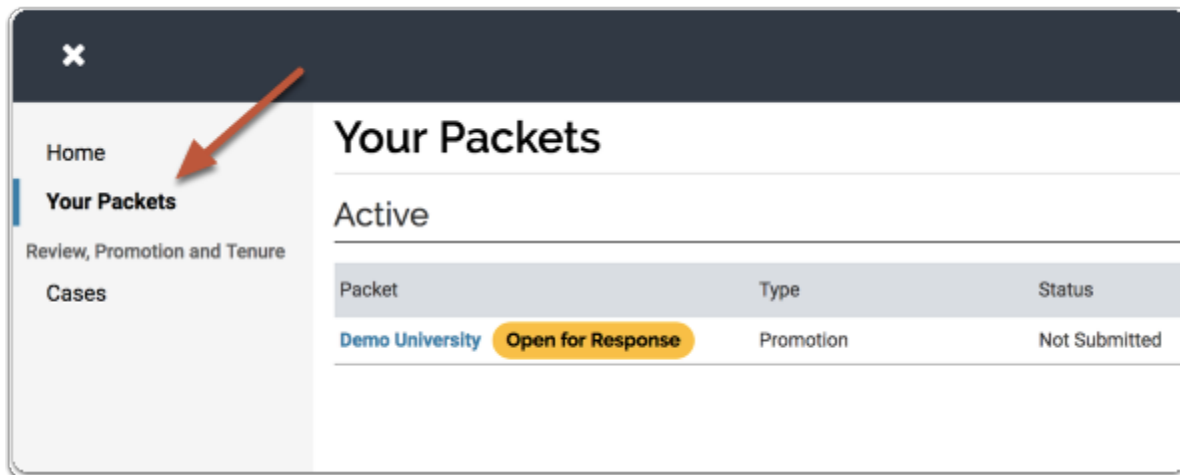
You will be required to sign in to your account to view the shared files.

Dear Dr. Pnt,

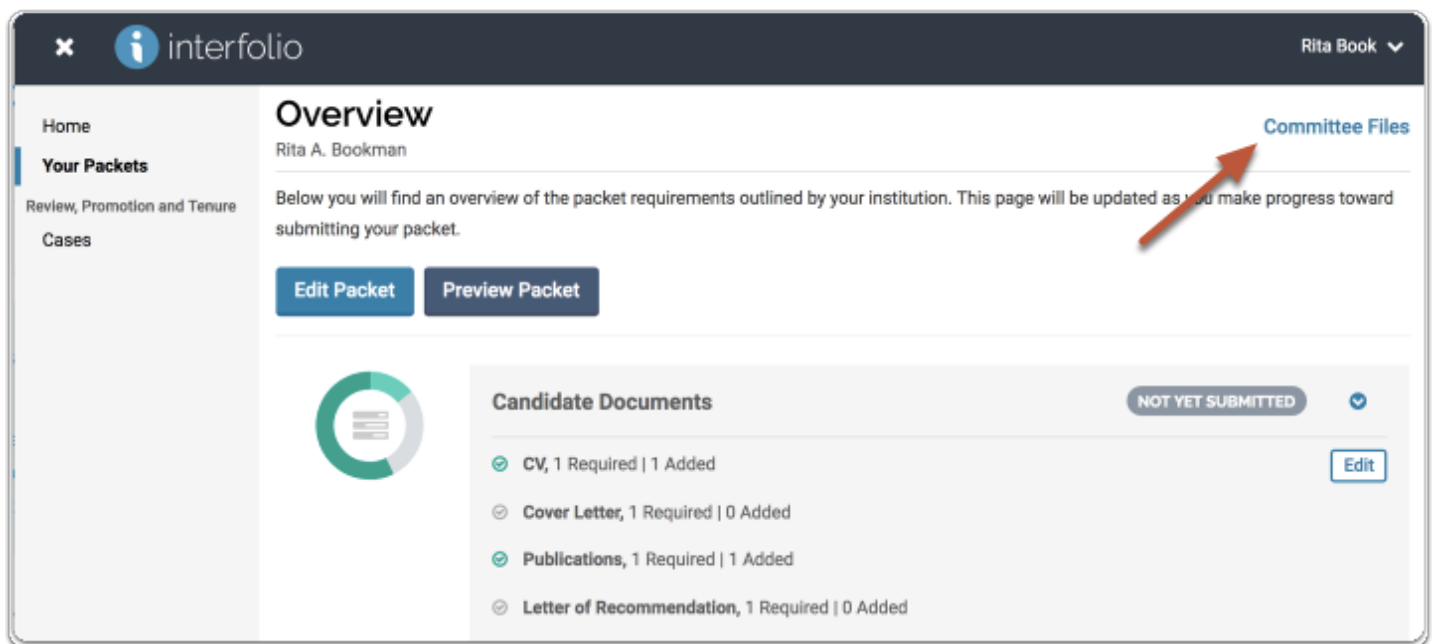
Please find attached the reason...

Powered by Interfolio's ByCommittee | Interfolio Support

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

Demo University > Overview >

Committee Files

Below you will see files that have been sent to you by committee members.

Sent by Beverly Brown on Nov 7, 2017		DUE: NOV 18, 2017	View
Report 1		Nov 7, 2017	
TP-Part-III-Chairs-Report.pdf		Nov 7, 2017	
Sent by Beverly Brown on Nov 7, 2017		DUE: NOV 18, 2017	View
Report 1		Nov 7, 2017	
TP-Part-III-Chairs-Report.pdf		Nov 7, 2017	
Sent by Beverly Brown on Mar 29, 2018		DUE: JUL 27, 2019	Respond View
Inventory Sheet		Mar 29, 2018	

You can also respond, if enabled, more on that below.

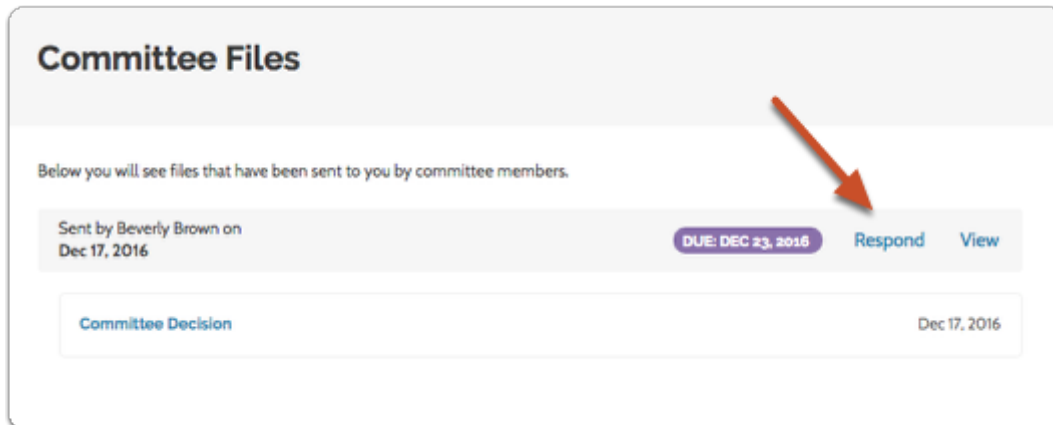
Responding to shared files:

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.

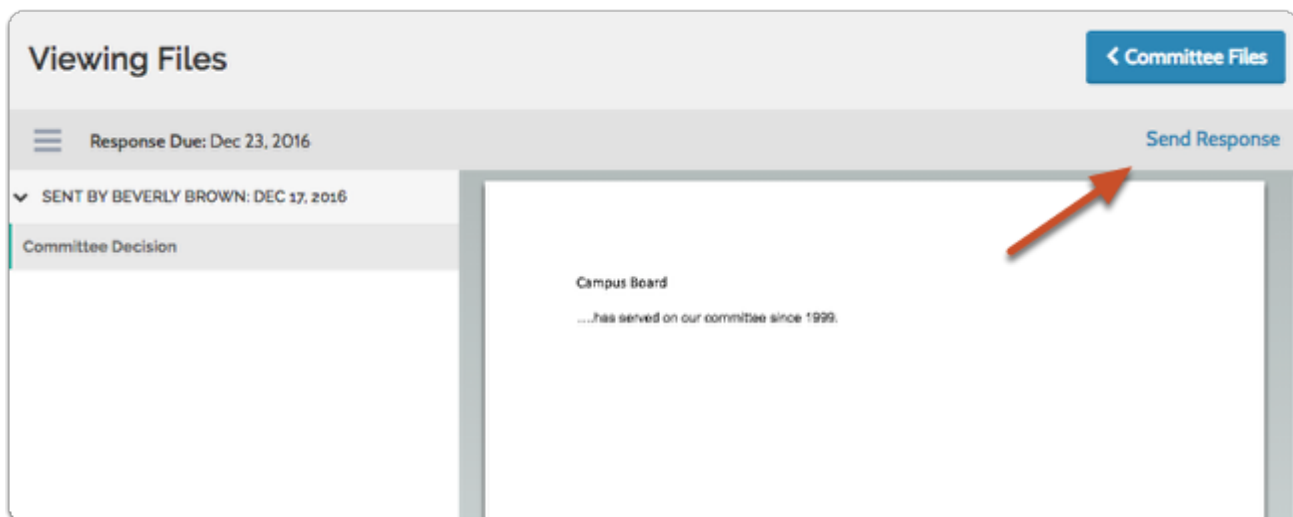
! Please Note: This is a hard deadline, and you cannot respond to the shared files after the due date.

TP-Part-III-Chairs-Report.pdf		Nov 7, 2017	
Sent by Beverly Brown on Nov 7, 2017		DUE: NOV 18, 2017	View
Report 1		Nov 7, 2017	
TP-Part-III-Chairs-Report.pdf		Nov 7, 2017	
Sent by Beverly Brown on Mar 29, 2018		DUE: JUL 27, 2019	Respond View
Inventory Sheet		Mar 29, 2018	

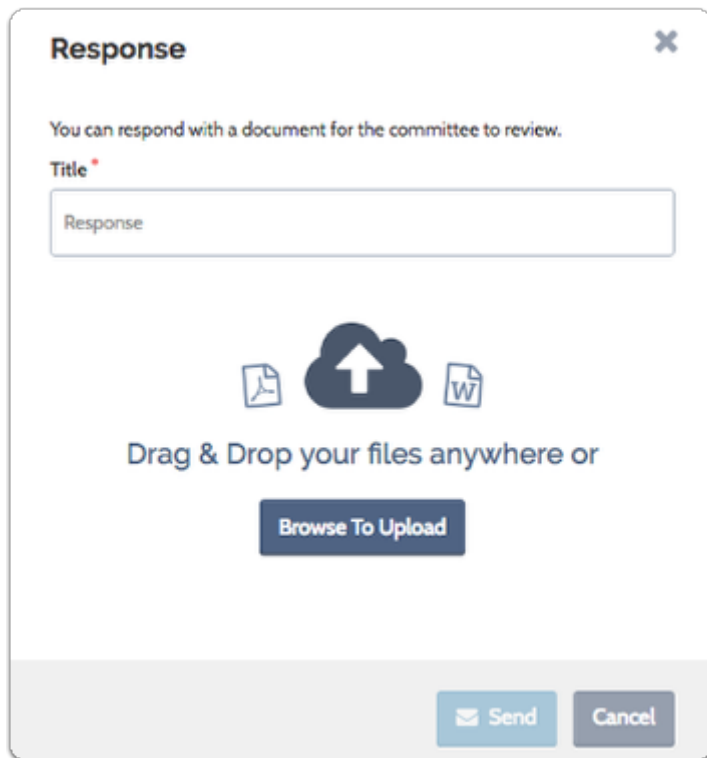
Click "Respond"



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



Upload a file with your response




Response ✕

You can respond with a document for the committee to review.


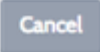
Title *

Response

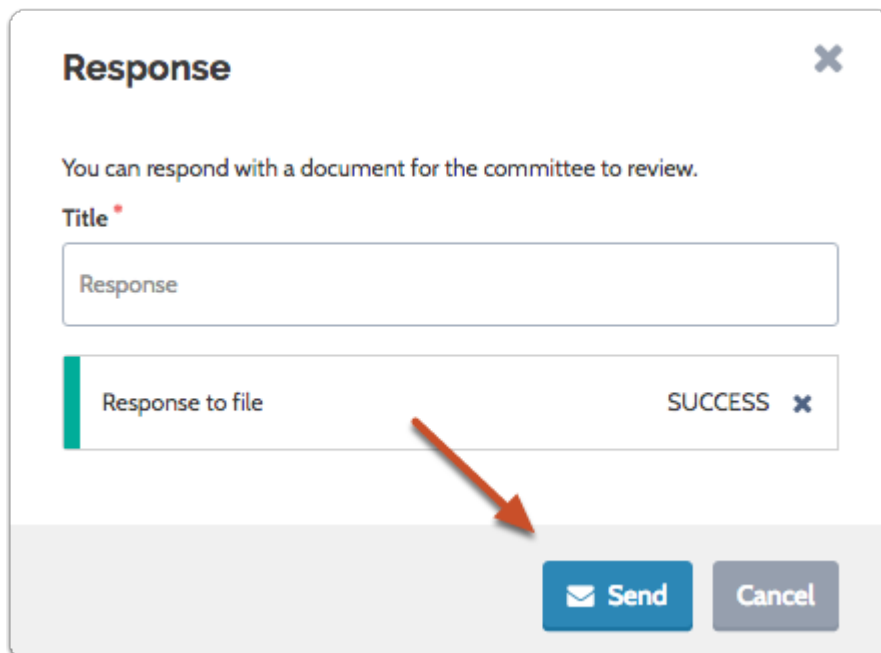


Drag & Drop your files anywhere or

Browse To Upload

 **Send**  **Cancel**

Click to "Send"





Response ✕


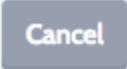
You can respond with a document for the committee to review.

Title *

Response





 **Send**  **Cancel**

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

Committee Files

Below you will see files that have been sent to you by committee members.

Sent by Beverly Brown on
Dec 17, 2016

DUE: DEC 23, 2016

View

Committee Decision

Dec 17, 2016

Response

Rebuttal to Committee Decision

Sent: Dec 17, 2016


Sent by Beverly Brown on
Dec 18, 2016

DUE: DEC 23, 2016

View


Report One

Dec 18, 2016



For External Evaluators: Guide to Providing Requested Evaluations in Interfolio Review, Promotion, and Tenure

If you have been asked to provide an evaluation for a candidate who is up for review at an institution that uses Interfolio Review, Promotion & Tenure, you can fulfill this request in a few, simple steps outlined below.

 You can print this article using the link to the left of the page.

Indicate if you accept or decline the letter request

All requests for evaluations are managed by an administrator at the institution conducting the search. This individual will invite you to submit an evaluation via email.

The email will include:

- A due date for submission of the evaluation
- The email address of the individual who sent the request, in case you have questions
- A personal note (if any) from the person or committee making the request



FARRAGUT SQUARE
STATE UNIVERSITY

Farragut Square State University is
conducting a review of Katie Feo and has
requested a Confidential Recommendation.

I ACCEPT

I DECLINE

Farragut Square State University asks that you submit your
recommendation by **May 26, 2017**. If you have questions about
this request, please contact david.lopez@interfolio.com.

Hi Dr. Marcus,

We are currently considering Katie Feo for a tenure-track faculty
position at FSSU. We are hoping you would consider writing a letter
of recommendation on her behalf. Please use the link in this email
to accept the request, review her information, and submit your
letter. We appreciate your support! Feel free to reach out to my
assistant Max Swagler if you need any support in fulfilling this
request.

Best,

David

If you accept the request:

Click "I accept"



FARRAGUT SQUARE
STATE UNIVERSITY

Farragut Square State University is
conducting a review of Katie Feo and has
requested a Confidential Recommendation.

I ACCEPT

I DECLINE

Farragut Square State University asks that you submit your
recommendation by **May 26, 2017**. If you have questions about
this request, please contact david.lopez@interfolio.com.

Hi Dr. Marcus,


We are currently considering Katie Feo for a tenure-track faculty
position at FSSU. We are hoping you would consider writing a letter
of recommendation on her behalf. Please use the link in this email
to accept the request, review her information, and submit your
letter. We appreciate your support! Feel free to reach out to my
assistant Max Swagler if you need any support in fulfilling this
request.

Best,

David

If you choose to accept the request you will be taken to a page with relevant documents (if any), provided by the institution, to help guide your review.

Click "View" to access files included with the request within the Interfolio Document Viewer.


 *Selecting "Accept" will notify the requester that you have accepted, but will not show whether you have read or uploaded materials.*

Request Details

Type:Confidential Evaluation


Requested by:Awesome P&T University

Message from Awesome P&T University:
Test



I accept, I will submit an evaluation.

I've changed my mind and decline to submit an evaluation.




Due **February 2, 2018**

You can not submit after the due date.

Supporting Documents


Cover Letter

Cover Letter


 Download

New File

Second Document


 Download

Recipe1

 Download

Evaluation from Kat Writers

committee_confidential_letter_of_recommendation

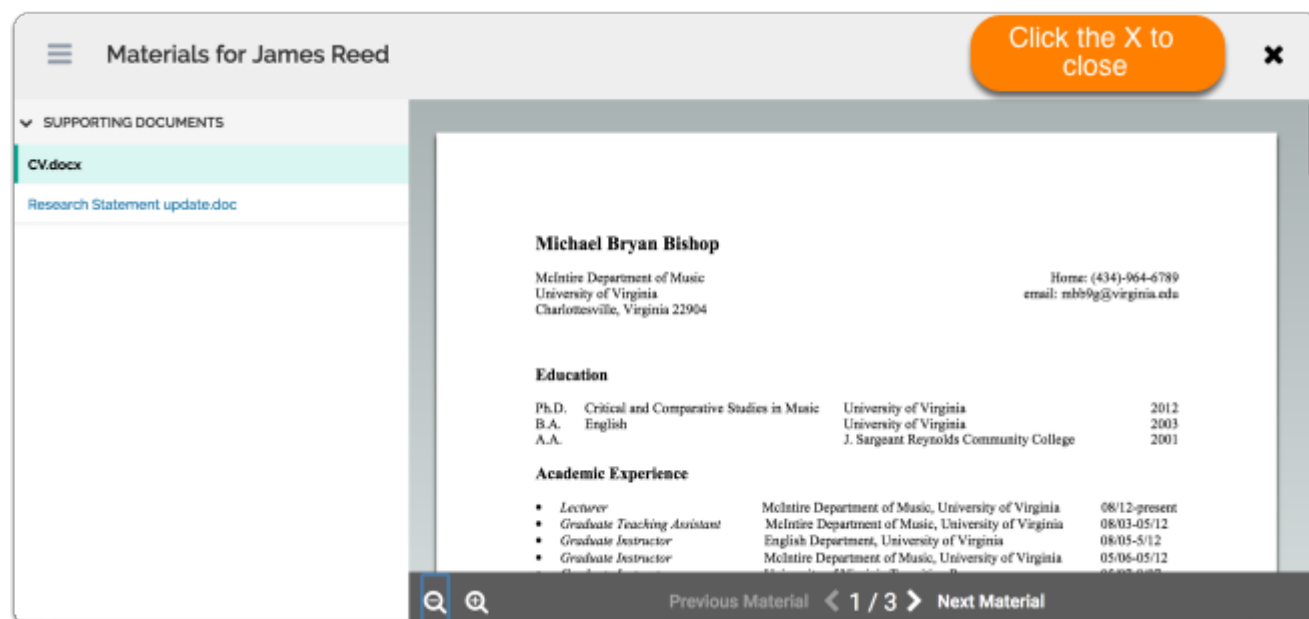
 Download

View

User Guides


Page 166

The document viewer will load and allow you to easily view the materials from within your browser.




After closing the document viewer, when you are ready to submit your evaluation, click "Select File for Upload"

You can return to the page at any time while you are working on your evaluation by either re-opening the initial email request and clicking "Accept," or, if you have an Interfolio account, sign into your account to find the request on your dashboard.



I accept, I will submit an evaluation.
I've changed my mind and decline to submit an evaluation.



Due February 2, 2018
You can not submit after the due date.

Supporting Documents

View

Cover Letter
Cover Letter

Download

New File
Second Document

Download

Recipe1

Download

Evaluation from Kat Writers1
committee_confidential_letter_of_recommendation

Download




Evaluation

Select File for Upload

[Read about our accepted file types.](#)


Drag & Drop or browse to locate the file containing your evaluation

Select File for Upload



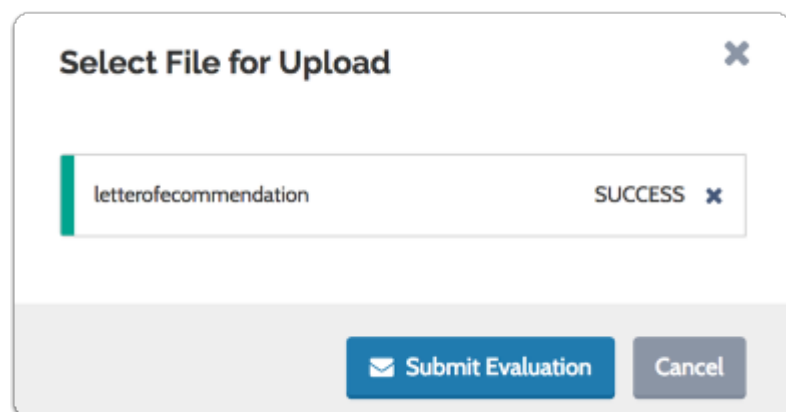
Drag & Drop your files anywhere or

Browse To Upload

 Submit Evaluation

Cancel

Click "Submit Evaluation"

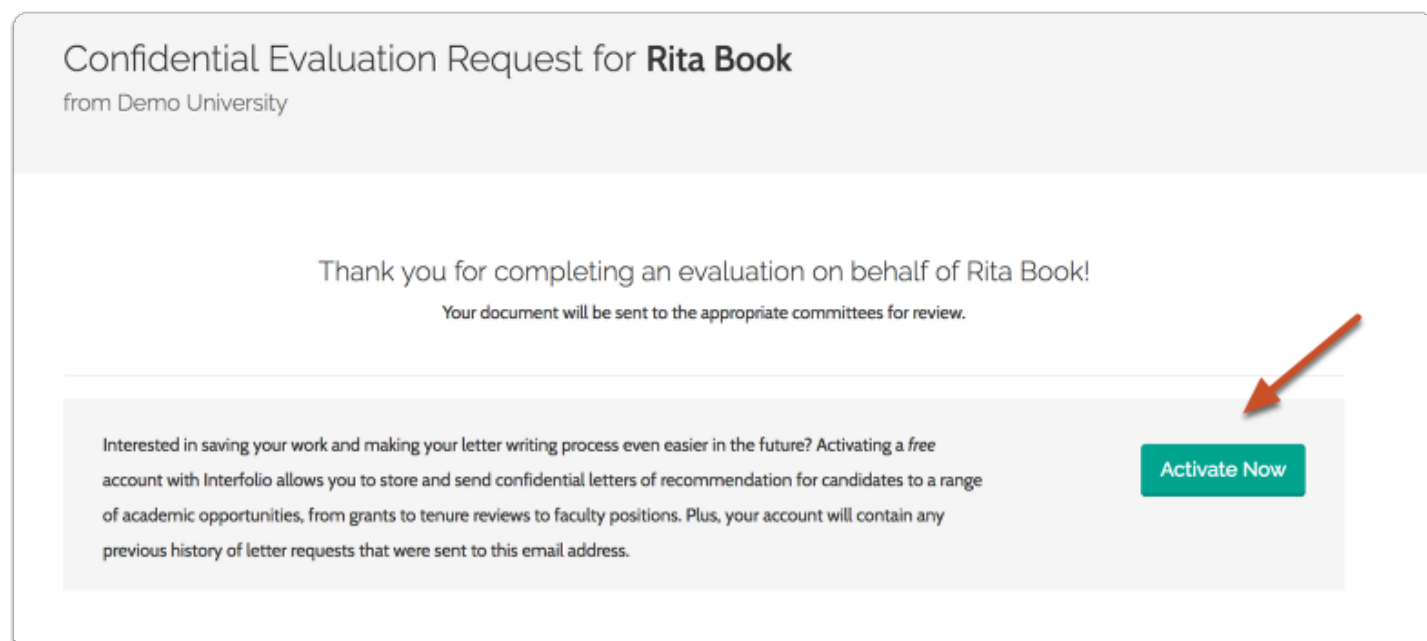


A dialog box titled "Select File for Upload" with a close button (X) in the top right corner. Inside the dialog, there is a text input field containing "letterofecommendation" and a "SUCCESS" status with a close button (X). At the bottom of the dialog, there are two buttons: "Submit Evaluation" (blue with a white envelope icon) and "Cancel" (gray).

Activate your free Interfolio account

You will see a confirmation screen thanking you for your evaluation and inviting you to create a *free* Interfolio account.

💡 You do not need an account to submit an evaluation. This is an optional step. However, you may find it useful to store, track requests, and send confidential recommendations using your free account.



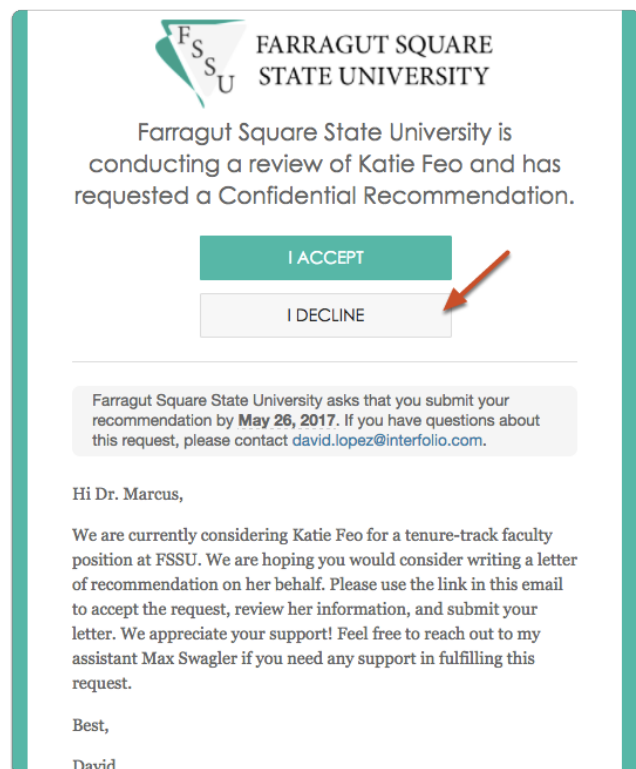
A confirmation screen titled "Confidential Evaluation Request for **Rita Book**" with "from Demo University" below it. The main text reads: "Thank you for completing an evaluation on behalf of Rita Book!" followed by "Your document will be sent to the appropriate committees for review." Below this, there is a light gray box containing text about activating a free account. To the right of this box is a green "Activate Now" button, which is pointed to by a red arrow.

Interested in saving your work and making your letter writing process even easier in the future? Activating a *free* account with Interfolio allows you to store and send confidential letters of recommendation for candidates to a range of academic opportunities, from grants to tenure reviews to faculty positions. Plus, your account will contain any previous history of letter requests that were sent to this email address.

Activate Now

If you decline the request:

Click "I Decline"



FSSU FARRAGUT SQUARE STATE UNIVERSITY

Farragut Square State University is conducting a review of Katie Feo and has requested a Confidential Recommendation.

I ACCEPT

I DECLINE

Farragut Square State University asks that you submit your recommendation by **May 26, 2017**. If you have questions about this request, please contact david.lopez@interfolio.com.

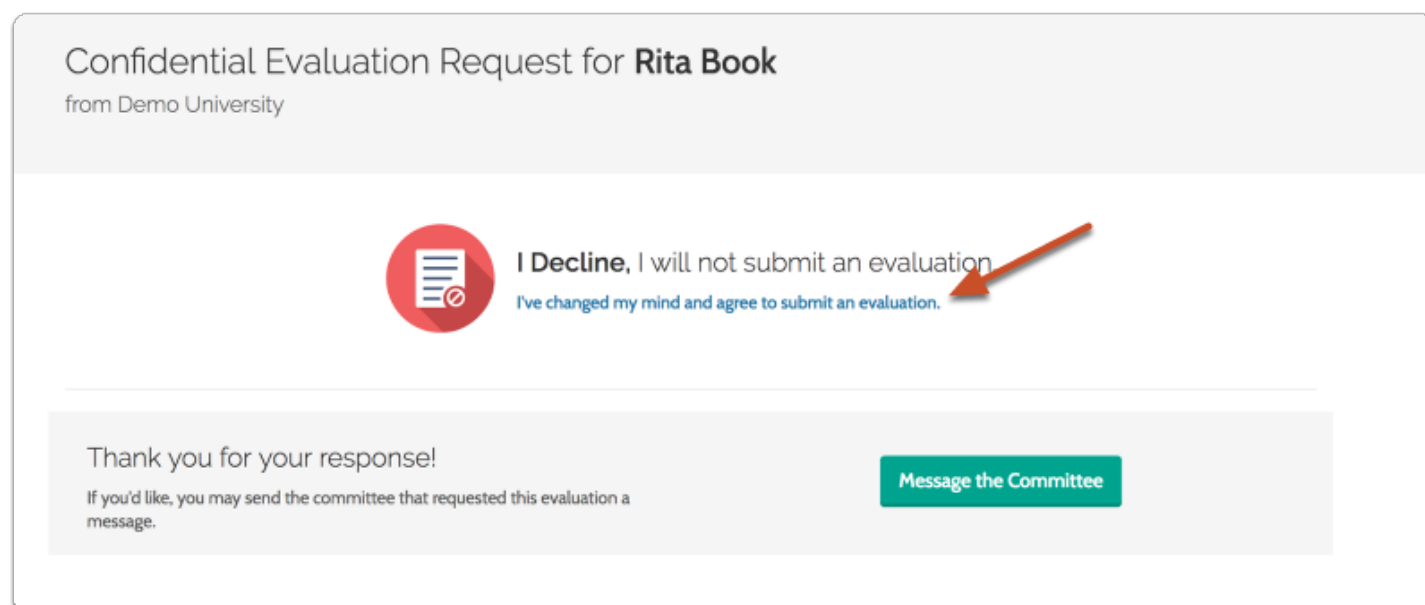
Hi Dr. Marcus,

We are currently considering Katie Feo for a tenure-track faculty position at FSSU. We are hoping you would consider writing a letter of recommendation on her behalf. Please use the link in this email to accept the request, review her information, and submit your letter. We appreciate your support! Feel free to reach out to my assistant Max Swagler if you need any support in fulfilling this request.

Best,

David

If you choose to decline the request for an evaluation you will be taken to a page confirming your choice. Note that if you change your mind, you can come back to this page through the original email (or your Interfolio account if you have one) and agree to submit an evaluation.



Confidential Evaluation Request for Rita Book
from Demo University

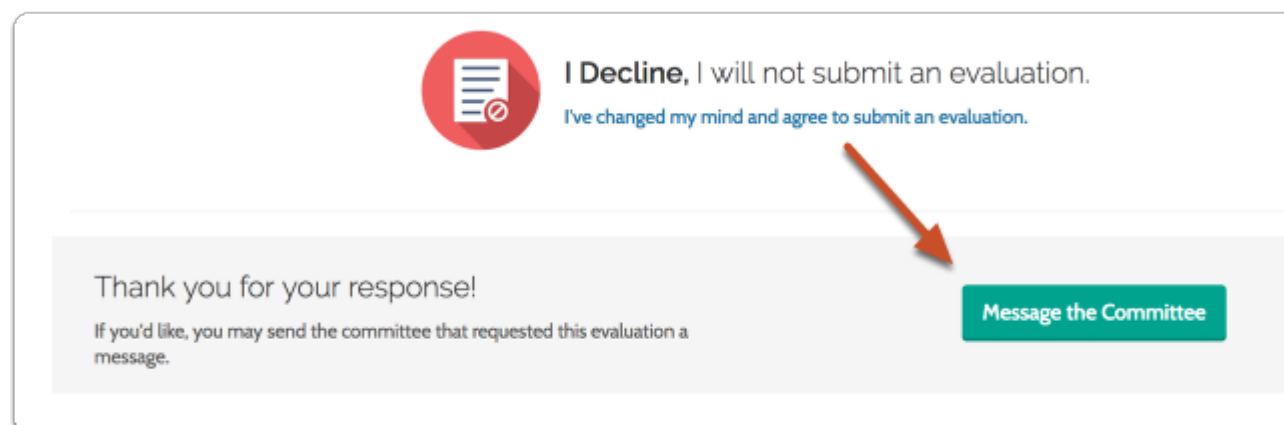
I Decline, I will not submit an evaluation
[I've changed my mind and agree to submit an evaluation.](#)

Thank you for your response!

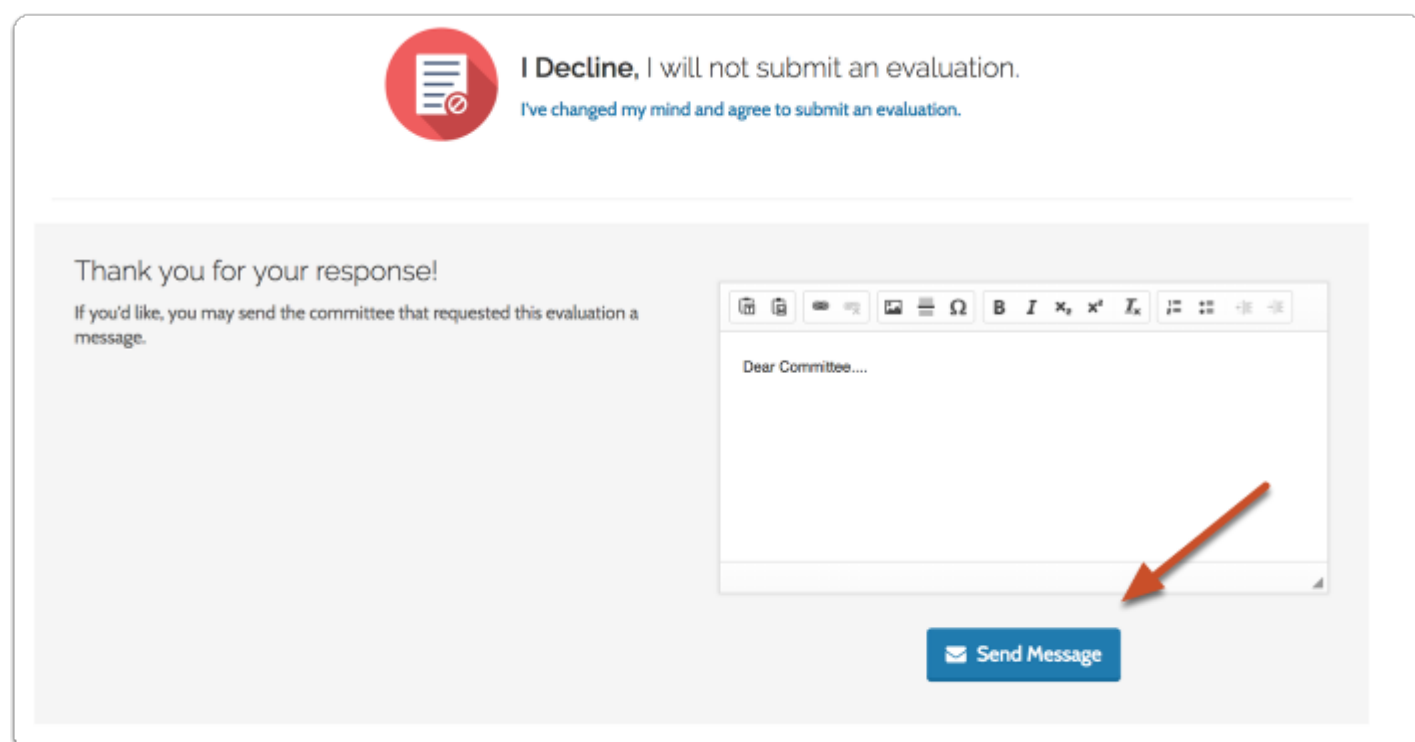
If you'd like, you may send the committee that requested this evaluation a message.

Message the Committee

Click "Message the Committee" if you want to write a message to the committee who sent the request



Type your reply and hit "Send Message"



Activate your free Interfolio account

You will see a confirmation screen thanking you for your decision along with an invitation to create a free Interfolio account.

- 💡 You do not need an account to submit an evaluation. This is an optional step. However, you may find it useful to store, track requests, and send confidential recommendations using your free account.

Confidential Evaluation Request for **Rita Book**

from Demo University

Thank you, we received your decision on May 1, 2017.

If you have any questions, please contact blothar.brown@interfolio.com.

Interested in saving your work and making your letter writing process even easier in the future? Activating a *free* account with Interfolio allows you to store and send confidential letters of recommendation for candidates to a range of academic opportunities, from grants to tenure reviews to faculty positions. Plus, your account will contain any previous history of letter requests that were sent to this email address.

[Activate Now](#)

Help and Resources

Getting Help For Interfolio

You can access detailed help for Interfolio by [signing in to your account](#) and visiting our Help Center.

If your institution has partnered with us to provide Single Sign-On, follow this link to [sign in through your institution](#).

Online Help Center

If you have questions about how to accomplish a specific task, [sign in](#) to your account, click on your name to select "Help" and try searching the extensive knowledge base of articles with step-by-step instructions at our online Help Center.

Scholar Services

You can also submit a help request via email to our Scholar Services team at help@interfolio.com.

-or- contact Scholar Services by telephone Monday-Friday, 9am-6pm, Eastern Standard at (877) 997-8807 (Toll Free).

We can also be reached via social media:

[@interfolio on Twitter](#)

[@interfolio on Facebook](#)

Help from your Institution

Some of our client institutions prefer that faculty members reach out to internal resources as opposed to our Scholar Services staff. Typically this is true for users at an institution that uses Faculty180.

Our staff will do our best to answer your questions, but you may first want to confirm that you shouldn't be getting support from resources at your institution.

Administrator's Guide to Interfolio Dossier

Quick Reference Guide to Dossier Institution for Faculty Members

What is Dossier?

Dossier, by Interfolio, is an online platform for faculty to collect, categorize, manage, and store scholarly materials in a secure, centralized place accessible only by you. Dossier may be integrated with your institution's new electronic case and committee review system, Review, Promotion & Tenure. This integration allows faculty to move selected materials easily from your private Dossier into your electronic file.

Soon, Faculty180 Users will have access to a Dossier to be able to store their information and connect to Review, Promotion, & Tenure. Allowing for institutions to track faculty work within Faculty180 and take advantage of the advantageous presentation and processes of Review, Promotion, and Tenure.

How do I access my Dossier?

There are multiple ways to access Interfolio Dossier, depending on your institution's set-up or your account status. Expand one of the links below to find the relevant guide.

To sign in via Single Sign-On (SSO) or by using your institutional credentials

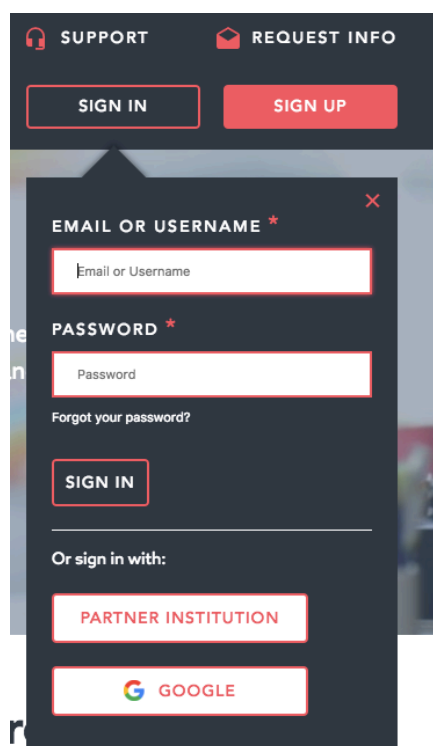
[Login with your institutional credentials via Single Sign-On.](#)

To sign in with your own personal credentials

Navigate to www.interfolio.com.

<https://www.interfolio.com/>

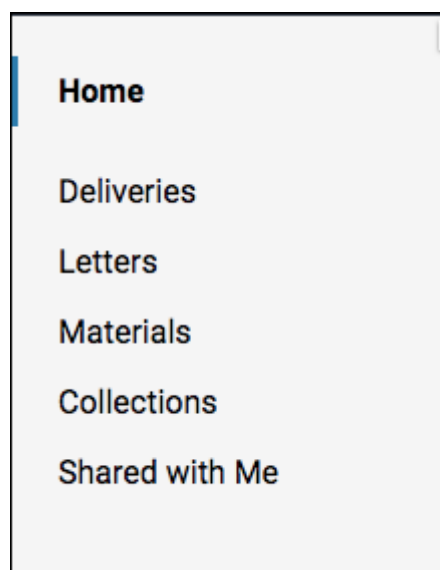
Select the Sign In button and login with your credentials



A screenshot of a login modal form. At the top, there are two links: 'SUPPORT' with a headset icon and 'REQUEST INFO' with an envelope icon. Below these are two buttons: 'SIGN IN' and 'SIGN UP'. The modal itself has a dark background and contains the following elements: a close button (X) in the top right corner, a label 'EMAIL OR USERNAME *', a text input field with placeholder text 'Email or Username', a label 'PASSWORD *', a text input field with placeholder text 'Password', a link 'Forgot your password?', a 'SIGN IN' button, a horizontal separator line, the text 'Or sign in with:', and two buttons: 'PARTNER INSTITUTION' and 'GOOGLE' (with the Google logo).


How do I upload materials?


1. To upload files to Dossier, click Materials on the navigation bar



2. Click Add Files to upload one or multiple documents from your computer to the All Materials section of your Dossier via the drag and drop or browse to upload functions.

My Materials

 Guidelines






 Request Recommendation

All Materials (16)

Filter

[View Archived Materials](#)

[+ Add Files](#)

<input type="checkbox"/>	Title ▾	Type ▾	Status ▾
<input type="checkbox"/>	Cover_Letter <div>None +</div>	 Cover Letter	Received Mar 25, 2018 at 6:49 PM
<input type="checkbox"/>	C.V. for Scott Harris <div>None +</div>	 Other Document	Received Mar 24, 2018 at 7:04 PM
<input type="checkbox"/>	Recommendation from A. N <div>None +</div>	 Confidential Letter of Recommendation or Evaluation	Completed / QC Pending Mar 23, 2018 at 10:52 AM
<input type="checkbox"/>	C.V. for Scott Harrissss <div>None +</div>	 Other Document	Received Mar 20, 2018 at 5:30 PM
<input type="checkbox"/>	Annual Self Assessment <div>None +</div>	 Other Document	Received Mar 12, 2018 at 2:26 PM

3. Select a Description and attach the relevant files or URL

For each file, select a description of the material from the dropdown (i.e., C.V., Student Evaluations) and click Add.

If no accurate description exists for the file, select "Other Document".

The file name can also be edited at this time.

To add links to videos, presentations, and websites to your Dossier, navigate to the Video or Webpage tab, enter the URL with a description, and click Add.

Add File ✕

Upload Video Webpage

Thank You! Your files are uploading now. Please select the type of material you are uploading. You also have the option to edit the title of the file.

CURRICULUM_VITAE C.V. ✕

PROFESSIONAL_DATA_SHEET Other Document ✕

➕ Add Cancel

4. Your uploaded materials will now appear in the All Materials section of your Dossier.

All Materials (2) ➕ Add Files Filter SEARCH

<input type="checkbox"/>	Title ↕	Type ↕	Status ↕
<input type="checkbox"/>	CURRICULUM_VITAE NONE ➕	C.V.	Received Aug 3, 2017 at 3:01 PM
<input type="checkbox"/>	PROFESSIONAL_DATA_SHEET NONE ➕	Other Document	Received Aug 3, 2017 at 3:01 PM

Faculty180 Users can Export their CV/Vita/Biosketch to their personal Dossier

! This feature has not yet been released. This is expected to be available to Faculty180 users in March 2018.

Faculty users in Faculty180 that have a Dossier institution account are able to export their CV directly to their personal Dossier for personal record keeping purposes and future storage.

Simply click on the Export/Share button and select "My Interfolio Dossier", to send the document to your personal Dossier as a PDF.

Refresh Vita

Export/Share ▾

Print

Export To

Word Document

PDF

My Interfolio Dossier

Share

Web Link

Personal CV

Scott K. Harris

Assistant Professor

(555)555-5516

S.Harris@DemoUniv.edu

Degrees

Ph.D. Accounting and Information Systems, The Pennsylvania State University (1995)

M.S. Engineering Science, The Pennsylvania State University (1992)

How do I organize my Dossier?

Related materials can be organized into folders or collections that will be useful when compiling various types of documents and evidence for an upcoming Faculty Review cycle.

To start, we recommend you create the following some basic collections to assist you with organizing your materials in preparation for your review. From here, you can create custom collections specific to your professional needs.

[Here is a guide to learn more about managing your Dossier.](#)

Home

Deliveries

Letters

Materials

Collections

Shared with Me

My Materials

Guidelines

Request Recommendation

Collections

+ Add Collection

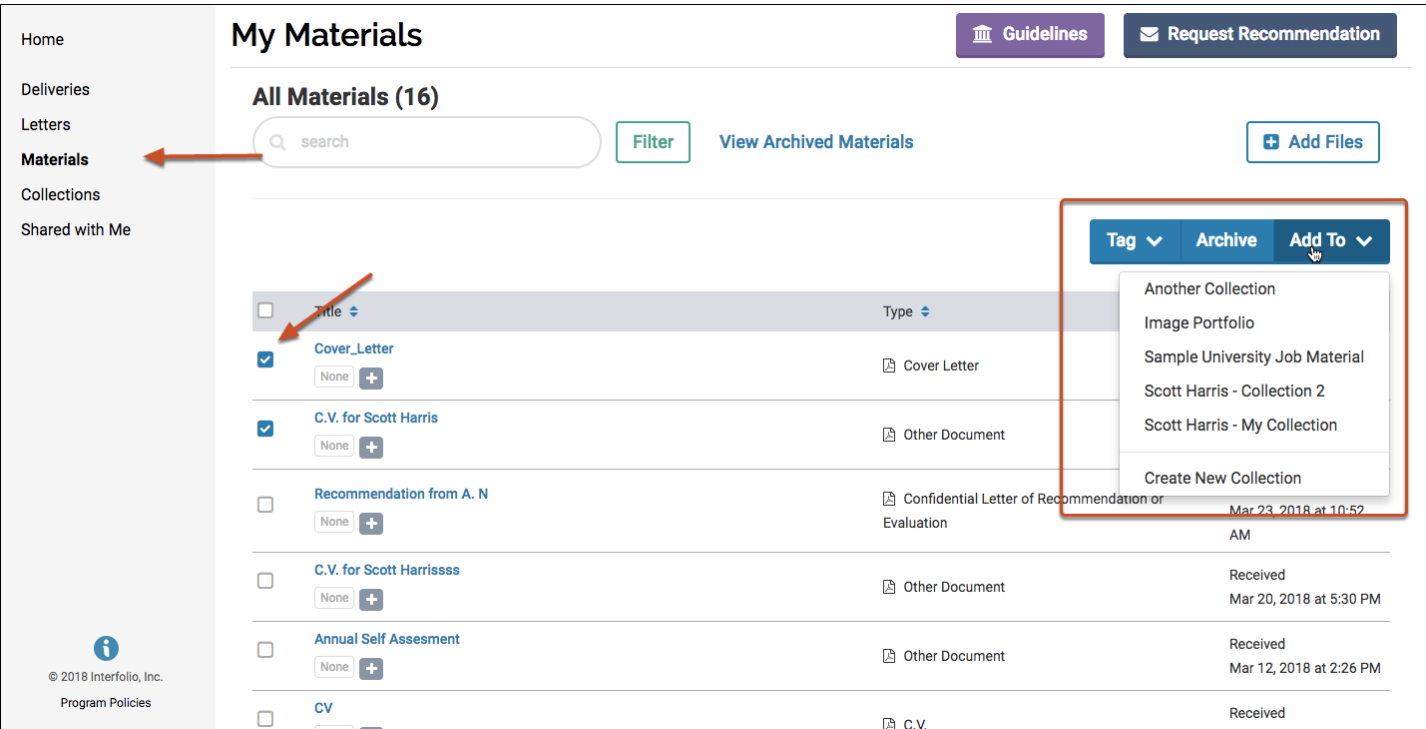
Name	Created	Actions
Another Collection	Mar 12, 2018	Select ▾
Image Portfolio	Mar 3, 2018	Select ▾
Sample University Job Material	Mar 27, 2018	Select ▾
Scott Harris - Collection 2	Feb 27, 2018	Select ▾
Scott Harris - My Collection	Jan 26, 2018	Select ▾

How do I create a collection of individual materials?

To move uploaded materials from the All Materials section into a Collection, navigate to the All Materials section, select the checkbox(es) on the item(s), click Add To, and select from the dropdown the Collection to which the materials should be added.

Materials can also be uploaded directly to a Collection by selecting the Collection at the time of upload. Materials uploaded directly to a Collection will also appear in the All Materials section.

[Here is a guide with more information on creating a collection.](#)



How do I share and receive feedback materials or collections?

Client institutions with Dossier Institutions, provides accounts to it's faculty members to keep track of their documents, and if necessary prepare for any reviews at the institution.

[Here is more information on how to share documents and receive feedback.](#)


Further Support

A direct link to Dossiers Quick Start Guide is located under the Dossier section of your Interfolio Dashboard.

If you need further assistance, please contact your institutional interfolio administrator. For general and technical support, contact help@interfolio.com

Video Guides

Interfolio Help Videos (Legacy)

 Note: These videos contain workflows and processes for Faculty Search and Review Promotion & Tenure. These videos are out of date but are referencable for a demonstration of what a single product experience or workflow is like.

Product	Date.Recorded - Title	URL
Faculty Search	11.2016 - Managing/Evaluating a Search	http://edu.interfolio.com/client/managing-creating-search
Review, Promotion & Tenure	11.2016 - Managing/Evaluating a Case	http://edu.interfolio.com/client/managing-creating-case
Review, Promotion & Tenure/Dossier	09.2016 - Candidate Experience	http://edu.interfolio.com/client/p-t-candidate
Review, Promotion & Tenure	09.2016 - Admin Experience	http://edu.interfolio.com/client/p-t-admin
Faculty Search	08.2016 - Creating/Managing a Search	http://edu.interfolio.com/client/creating-and-managing-a-search
Review, Promotion & Tenure	02.2017 - Promotion & Tenure Admin	http://edu.interfolio.com/client/p-t-admin