

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 & Tenure service.

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

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- [How to view files that are shared with you by the committee in RPT](#)
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If your institution uses Interfolio Review, Promotion, & Tenure to conduct reviews 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 should 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](#)

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

Your promotion review will begin Monday, January 23rd. Please log in to your Interfolio account and follow the instructions...

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

Activate your account

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

Enter a password, 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 *

x

Show Password

Password is required.

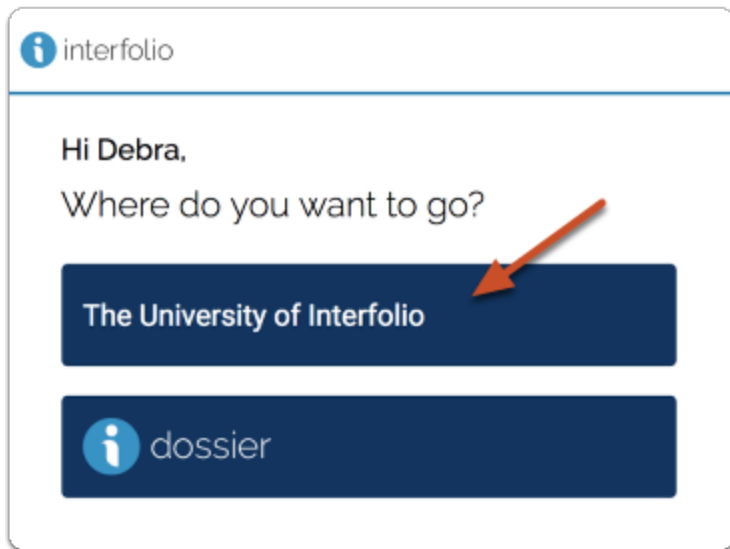
I agree to Interfolio's [Terms of Service](#).

[Activate Account](#)

View your packet instructions and requirements:

Select your institutional account

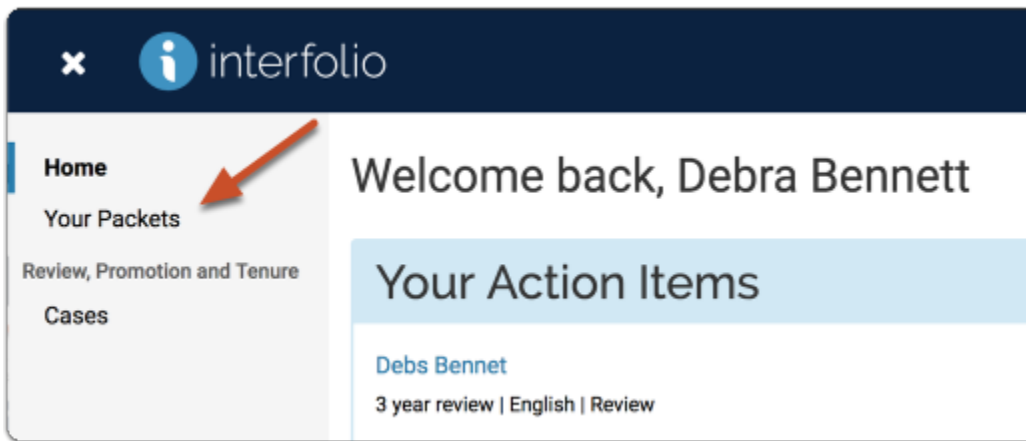
You will have both an institutional account and a personal Dossier account. Select to your institutional account when prompted.




Click the link to "Your Packets" from the navigation bar, or use the link in your homepage action items

Not seeing it?

If you do not see this in your navigation bar, you might be on the Dossier page, switch accounts using the account menu at the top right of the page.



Select the packet you want to work on

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

Your Packets

Active

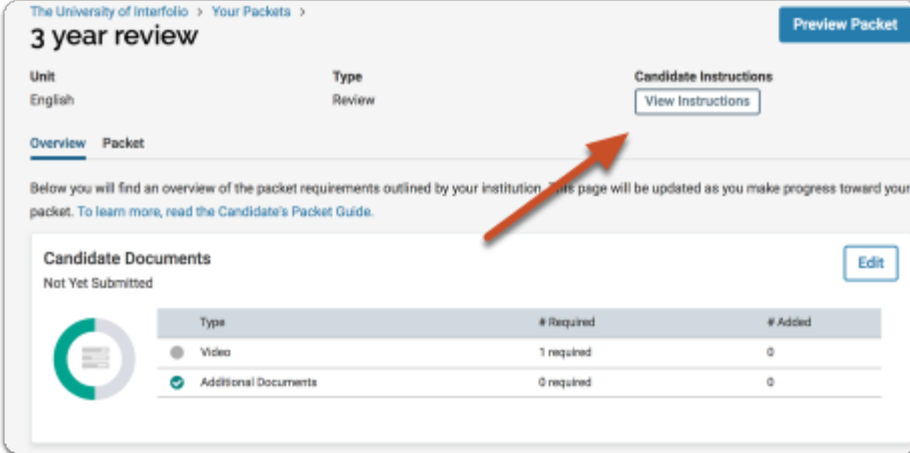
Packet	Type	Status	Due Date	
English Department 3rd Year Review (Tenure Track)	Review	Not Submitted	-	View
English Department Tenure Review	Tenure	Not Submitted	-	View

Completed

Packet	Type	Responded	Completed	
Farragut Square State University		-	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 "View Instructions" to read instructions provided by your institution for assembling and submitting your packet



The screenshot shows a web interface for a '3 year review' packet. At the top, there is a breadcrumb trail: 'The University of Interfolio > Your Packets > 3 year review'. A 'Preview Packet' button is in the top right. Below the title, there are tabs for 'Overview' and 'Packet', with 'Overview' selected. A 'Candidate Instructions' section contains a 'View Instructions' button, which is highlighted by a red arrow. Below this is a 'Candidate Documents' section with a sub-header 'Not Yet Submitted' and an 'Edit' button. A progress indicator shows a green circle that is about 25% full. A table lists document requirements:

Type	# Required	# Added
Video	1 required	0
Additional Documents	0 required	0

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.

Candidate Documents

[Edit](#)

Submitted

Type	# Required	# Added
<input type="radio"/> CV	1 required	1
<input type="radio"/> Cover Letter	1 required	1
<input type="radio"/> Research Statement	1 required	1
<input checked="" type="checkbox"/> Additional Documents	0 required	6
<input checked="" type="checkbox"/> Tenure Application Form Part II	1 required	1

Evidence of Teaching Excellence

[Edit](#)

Due: 2016-05-26 | Submitted

Type	# Required	# Added
<input type="radio"/> Peer Observer's Reports	3 required	1
<input checked="" type="checkbox"/> Statement of Teaching Philosophy	0 required	1
<input checked="" type="checkbox"/> Additional Documents	0 required	0
<input checked="" type="checkbox"/> Table of Courses Taught	1 required	1

If enabled by an administrator, you may also be able to add sections to your packet. If this feature is enabled, when you open the "Packet" tab, you will see an "Add Section" button.

Demo University > Your Packets >

Music Promotion Cases

Unit: Ethnomusicology Type: Promotion

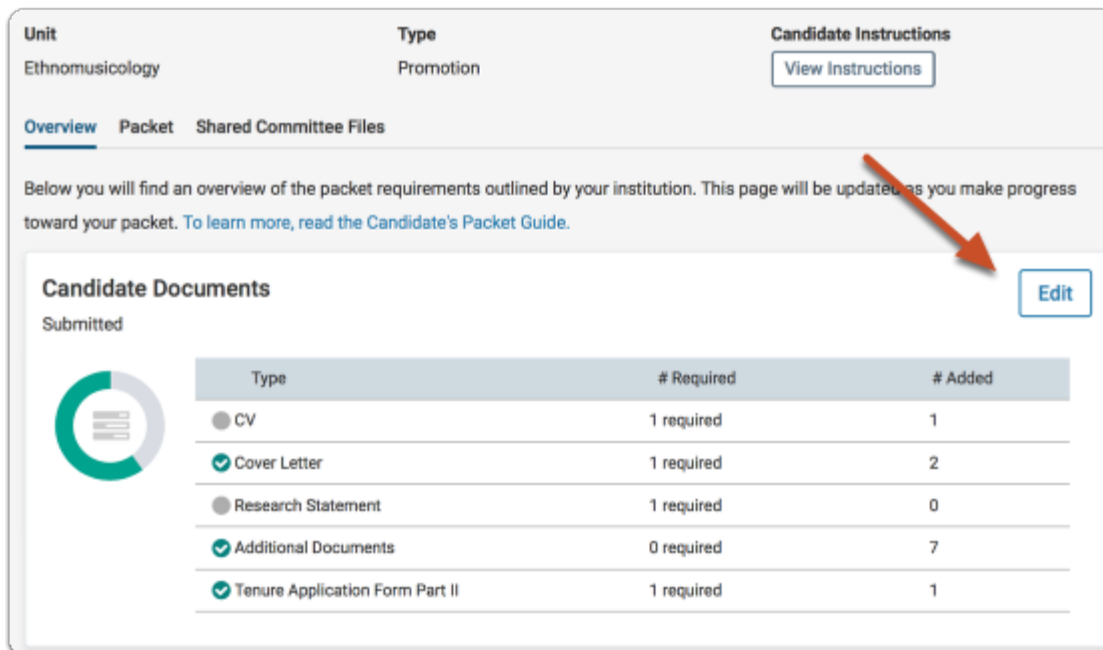
Overview **Packet** Shared Committee Files

Expand All
 Collapse All
 Add Section

> **Candidate Documents**
 Not Yet Submitted Unlocked

Add files to satisfy packet requirements:

Click the "Edit" button for the section to which you want to add your files



Unit: Ethnomusicology | Type: Promotion | Candidate Instructions: View Instructions

Overview | Packet | Shared 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 your packet. [To learn more, read the Candidate's Packet Guide.](#)

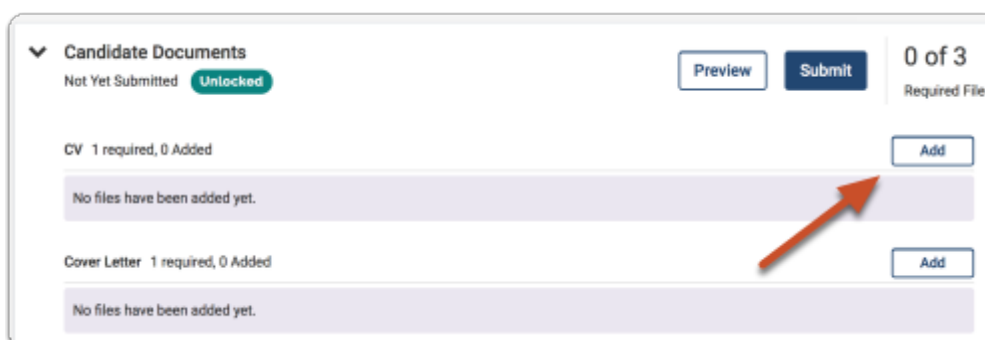
Candidate Documents

Submitted

Type	# Required	# Added
CV	1 required	1
✓ Cover Letter	1 required	2
Research Statement	1 required	0
✓ Additional Documents	0 required	7
✓ Tenure Application Form Part II	1 required	1

[Edit](#)

Click "Add" next to the requirement



Candidate Documents | Not Yet Submitted | Unlocked | Preview | Submit | 0 of 3 Required Files

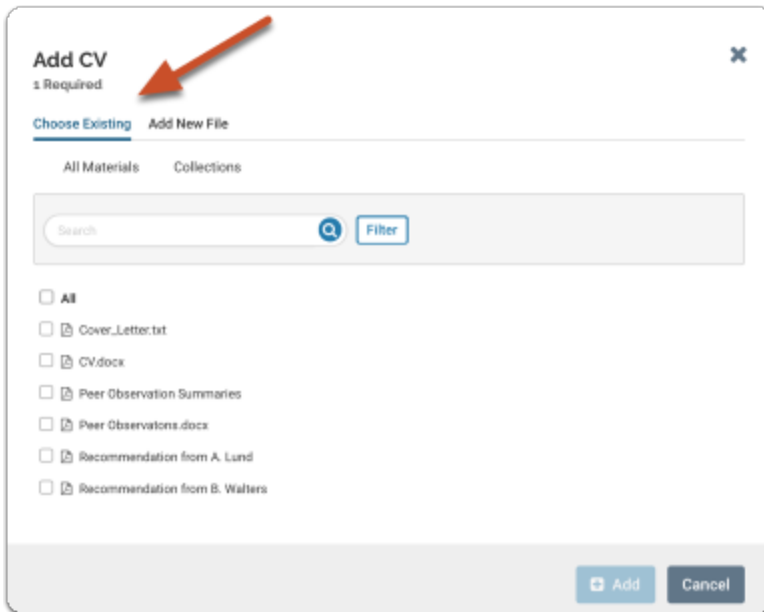
CV 1 required, 0 Added | [Add](#)

No files have been added yet.

Cover Letter 1 required, 0 Added | [Add](#)

No files have been added yet.

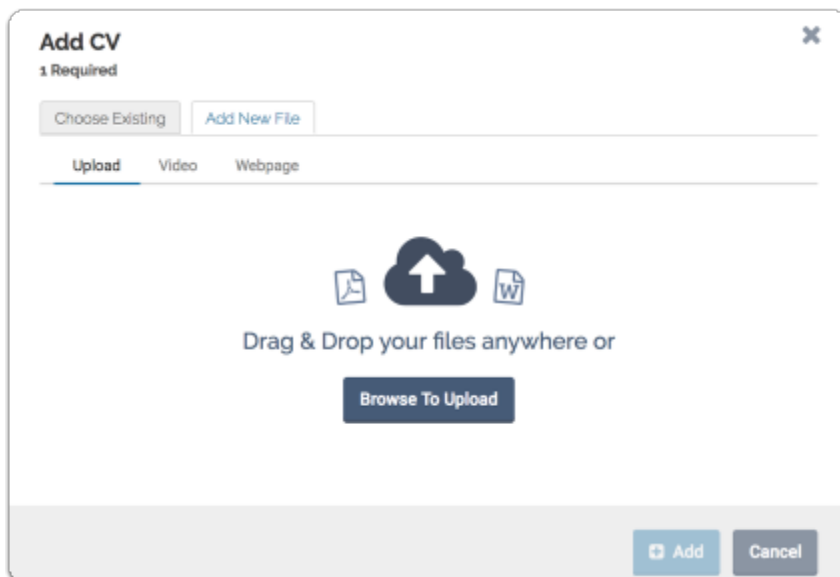
On the "Choose Existing" tab you can add existing files you have already uploaded to your Dossier



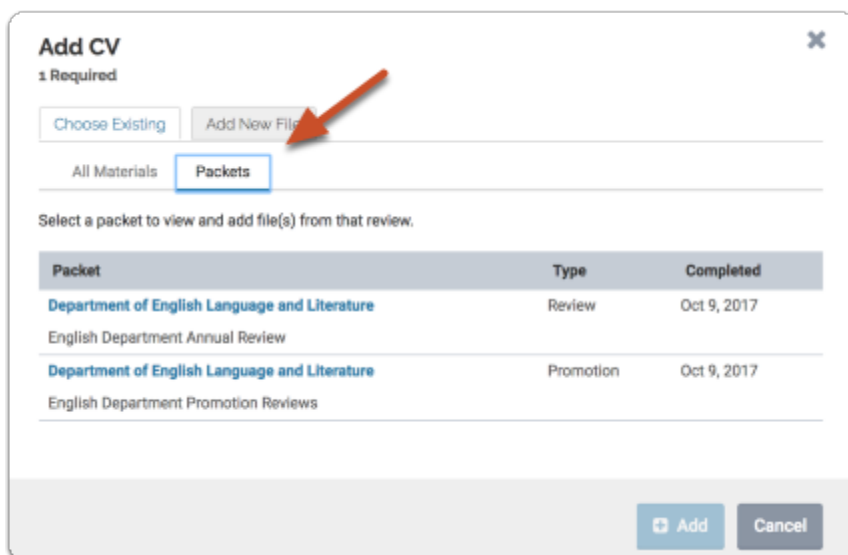
Or you can add new files including video and webpages:

- ⚠ 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.

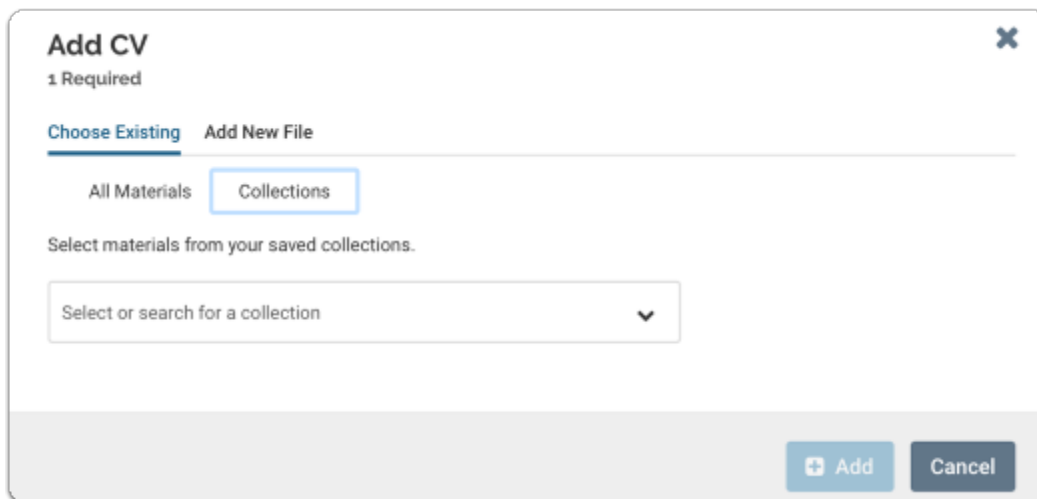
By default, the name that will appear to reviewers is the name of the file as you upload it, but you can also edit the title of a file after adding it to your packet.



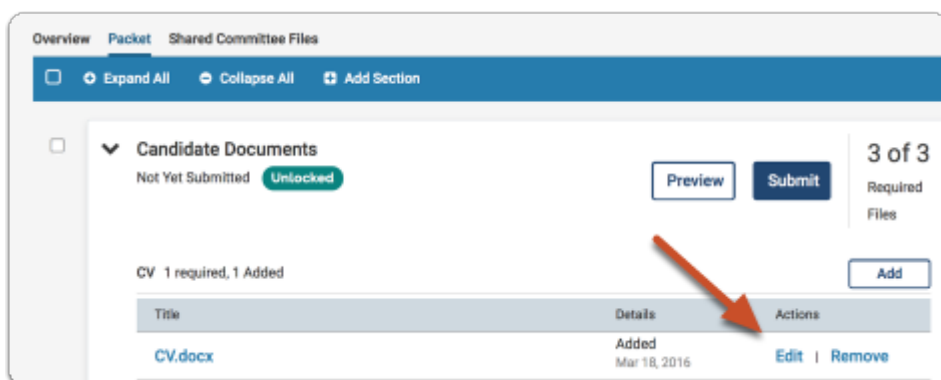
You can add files from packets you have submitted for previous reviews run through RPT:



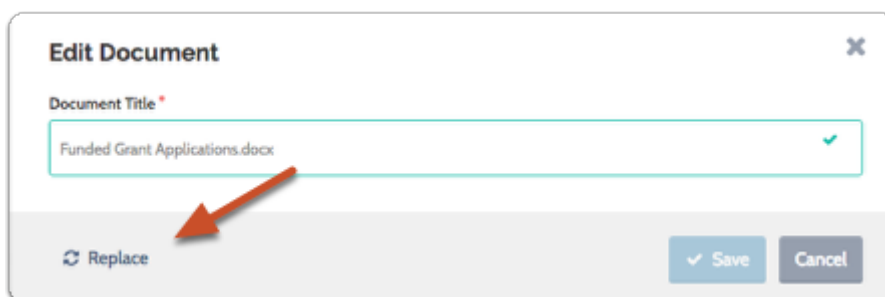
Or, you can add files from collections you have created in your Dossier:



If you need to edit or replace a document, click the "Edit" action




You can edit the title of the file, or click "Replace" to choose a new file to replace it.



Files can also be added (suggested) by an administrator

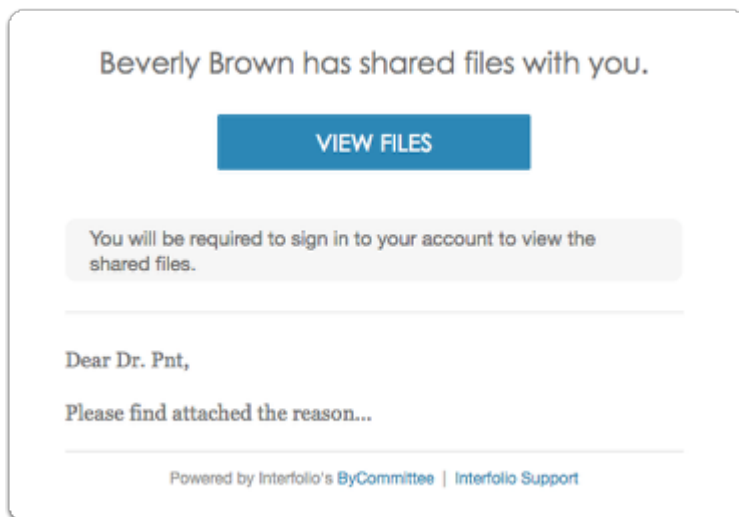
If a file is added to your packet by an administrator, it will appear as "Suggested by..." and the administrator's name. You can choose to keep the file or remove it.


 Note that you cannot delete responses you have submitted to committee files that have been shared with you.

Viewing and Responding to shared files:

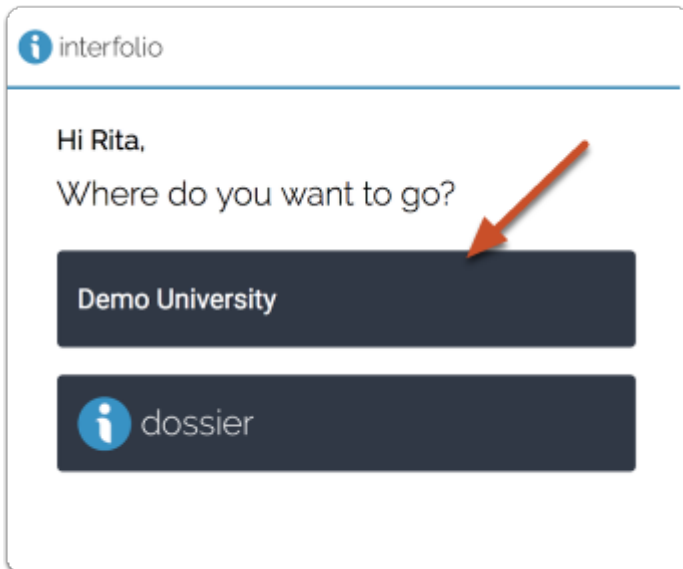
The committee reviewing your case may share files for you to review. The committee may also allow you to respond to the shared files in writing, and may set a date when the response is due.

If the committee shares files with you, you will get an email prompting you to log in and view the shared files.

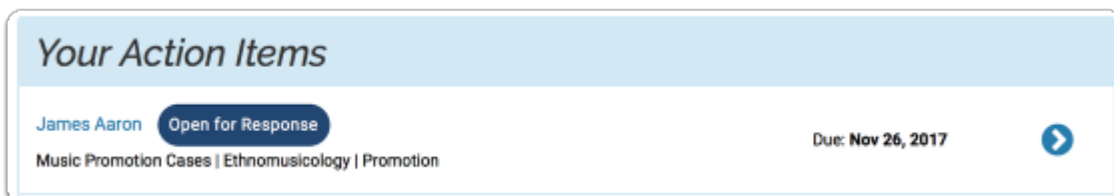


 **Please Note:** The response due date is a hard deadline, and you cannot respond to the shared files after the due date.

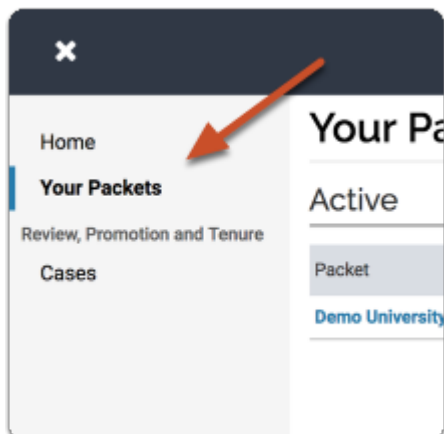
You will need to be logged in to view and/or respond to files shared with you by the committee. Log in to Interfolio and select your institutional account.



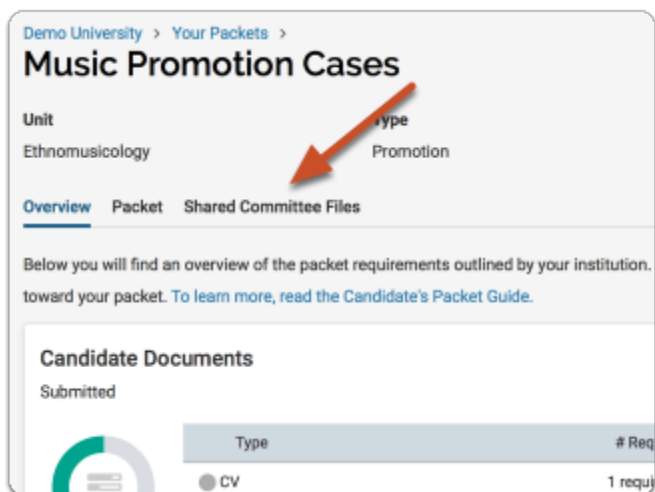
You will see an action item indicating that a file has been shared and an indication if a shared file is open for a response. You can click your name to view the packet.



-or- click "Your Packets" in the left hand navigation and select the case



Open the "Shared Committee Files" tab of the case packet



Files shared with you will appear listed

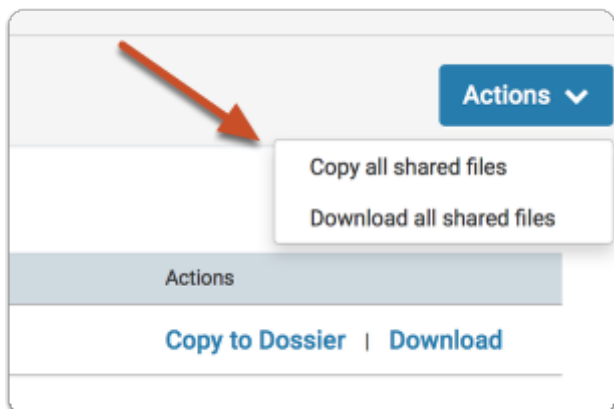
You can download the file, or copy it to your Dossier where it will appear in your Dossier materials.

The screenshot shows a web interface for 'Music Promotion Cases' at Demo University. At the top, there are navigation links for 'Demo University > Your Packets >' and a 'Preview Packet' button. Below this, the title 'Music Promotion Cases' is displayed. The interface is divided into sections: 'Unit' (Ethnomusicology), 'Type' (Promotion), and 'Candidate Instructions' (View Instructions). A tabbed interface shows 'Overview', 'Packet', and 'Shared Committee Files'. A message states: 'Below you will see files that have been sent to you by committee members.' An 'Actions' dropdown menu is visible. A red arrow points to the 'Actions' column in a table of shared files. The table has two columns: 'Shared Files' and 'Actions'. The first row shows 'Department Chairs Report' with 'Copy to Dossier' and 'Download' options. Below the table, there is a section for 'Open for Response' with a due date of 'Jan 25, 2019' and a 'Send Response' button.

If you click "Copy to Dossier," you will have the option to add the file directly to a collection of materials (if you have any collections available).


The screenshot shows a dialog box titled 'Copy 1 File To My Dossier Account'. It includes a close button (X) in the top right corner. The 'Copying To' section shows 'My Dossier Account (xxjrrrrr@demo.edu)'. Below this, there is an 'Add to this collection (optional)' section with a description: 'Collections let you group together documents in your Dossier for easy submission to review cases, or searches.' A dropdown menu is open, showing 'Utah Job' as the selected option. Underneath, there is a 'Shared Files' section with a checked checkbox next to 'Department Chairs Report'. At the bottom, there are 'Copy' and 'Cancel' buttons.

You can also click the "Actions" button to the right of the page to copy or download all shared files.

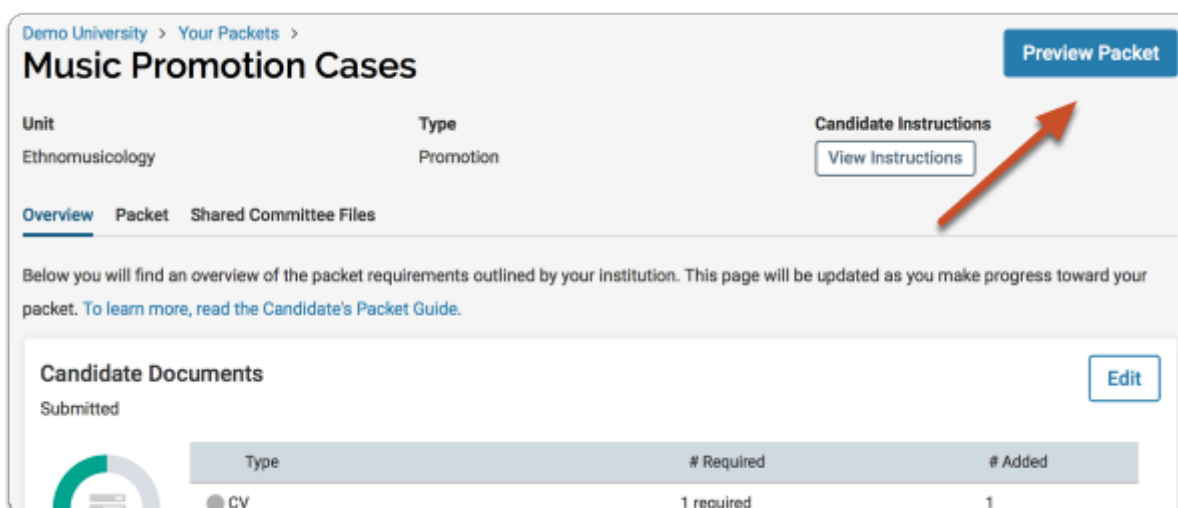


You can preview completed packet sections or your entire packet before submitting:

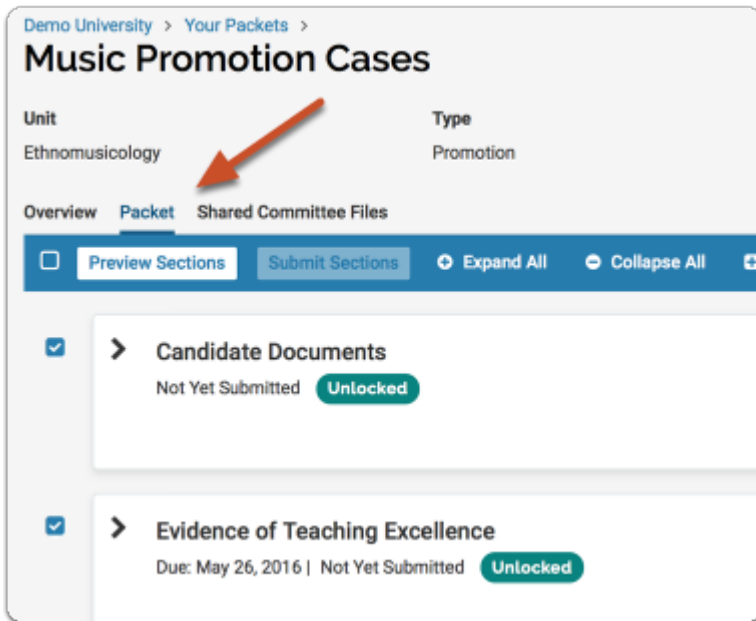
You can preview how your packet will appear to reviewers:

 The preview shows exactly how the packet you are submitting will appear to your committee.

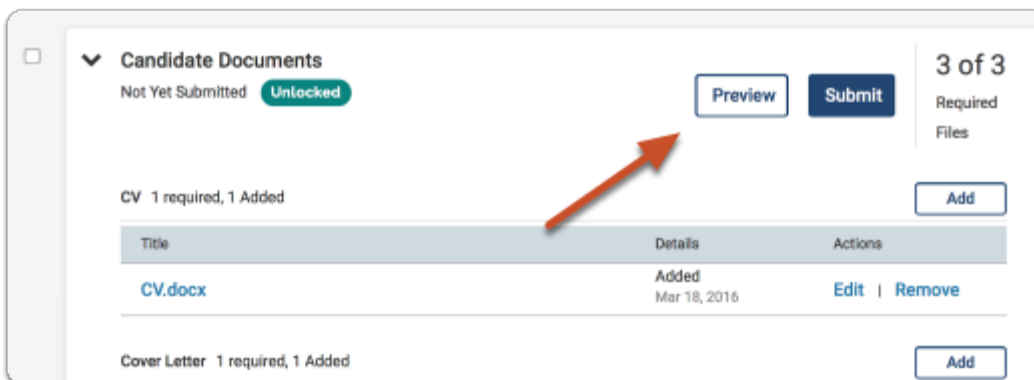
Click "Preview Packet" at the top right of the page



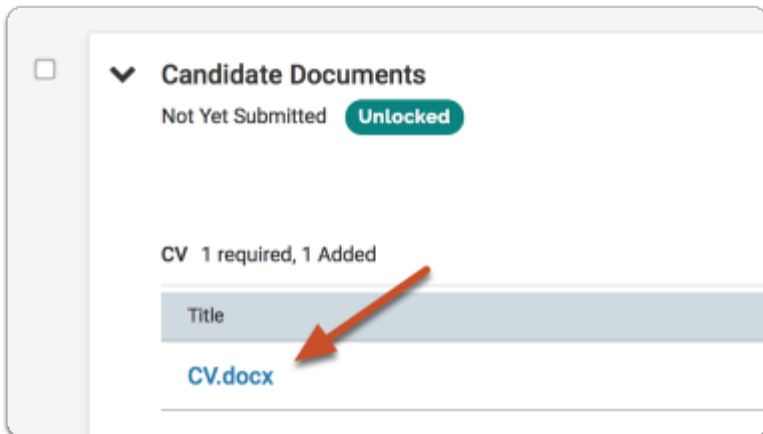
You can click to select multiple sections and preview the selected sections in the document reader



You can also preview individual sections of the packet

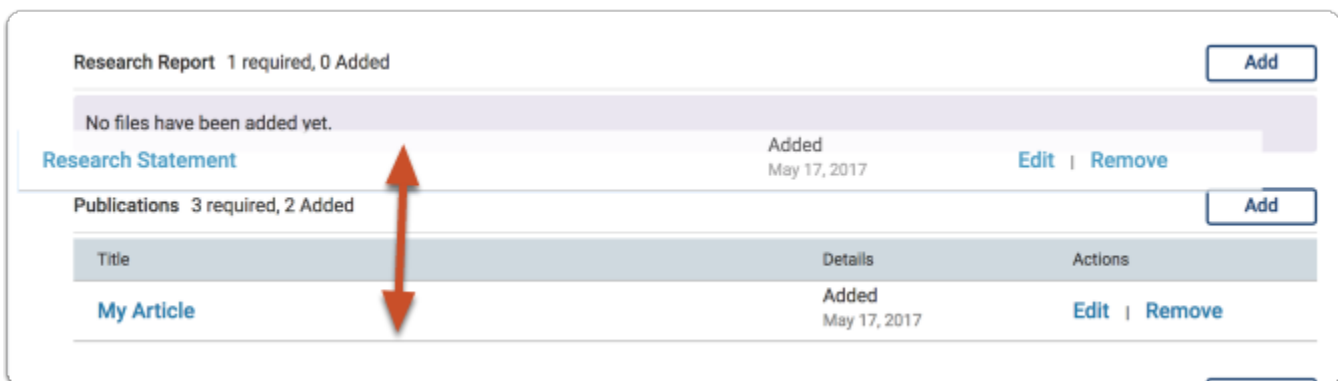


-and- preview individual documents by clicking the document title



You can drag-n-drop required documents on the packet tab:

- You can move one or more fulfillments from one requirement to another
- You can reorder fulfillments within the same requirement
- However, you can't move or rearrange fulfillments in a locked requirement



Locked Sections

- i** If a section is labeled as "Locked," 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.

Submitting candidate packets:

When you submit a section:

If the section doesn't have the required number of materials, you will see a window with a message that about missing items needed to submit:

Submission Confirmation

The section cannot be submitted because there are issues with the requirements listed below. You can submit the section once you have corrected any issues and added materials to meet the requirements for the section.

Requirement Name	Issue
Research Statement	Missing the minimum number required

Close

When submitting a section that meets the required number of materials, you will see a confirmation message shown below:

Confirm

You cannot edit the documents and forms within a section once it has been submitted. An administrator will need to unlock the section in order for you to make any changes. Are you sure you want to submit the section Personal Statements at this time?

Yes No

After you successfully submit a section, you will see a confirmation notice in lower left corner of browser indicating that the section is now available to the appropriate committee members for review.

We have also taken measures to prevent you from adding more than the required number of documents for a given document requirement before submitting your packet.

When you add more documents than the required number, the number added changes color and is bolded to draw attention to the error.

Cover Letter 1 required, **2 Added** Add

Title	Details	Actions
Research Statement update.doc	Added Mar 18, 2016	Edit Remove
Cover_Letter.txt	Added Mar 18, 2016	Edit Remove

If you try to submit a section with too few or too many materials for the given requirements, you will see a message indicating if the issue is too many or too few requirements. With the text: "You can submit the section once you have corrected any issues and added materials to meet the requirements for the section."

Submission Confirmation ✕

The section cannot be submitted because there are issues with the requirements listed below. You can submit the section once you have corrected any issues and added materials to meet the requirements for the section.

Requirement Name	Issue
Cover Letter	Exceeds the maximum number required
Research Statement	Missing the minimum number required

[Close](#)