Reviewers Guide

PREPARED BY THE FAR OFFICE, CSUF
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Department Chair Declares Complete
Candidate Role:
Faculty members scheduled to undergo a Post-Tenure Review () within your department will need to perform 1 task before their portfolio becomes available to be declared complete

1) Complete and Submit all review packet sections within the Interfolio by the deadline specified in the annual Timetables provided by FAR

PLEASE NOTE: There is no Checklist for a Post-Tenure Review

Receiving the case:
1) After the faculty member has completed the task above you will be notified by Interfolio via email that a case is ready for your review.
   a) The email will look like this:
      i) Click on the Sign-in button to be redirected to Interfolio.

Responsibilities for this Review Step:
1) Log in
2) Find the cases assigned to you as a Reviewer
3) Check the case for Completeness
   a) If material is missing from the Portfolio:
      i) “Unlock” the section(s) with the missing material
      ii) Contact the faculty member instructing them to:
(1) Upload the missing material
(2) Re-submit the section(s) when they are done
(3) Give them a deadline to complete the task

4) Forward the all assigned cases to the combo C and Dean Level by the deadline specified in the Annual Timetables provided by FAR

*PLEASE NOTE: FAR will not be creating binders this year, all paperwork that would normally have to go into the binder will be assigned as “Required Documents” at each review level. The process for satisfying these requirements will be discussed in later chapters

How to Login
To Log in to Interfolio there are 3 options to choose from, but the Process of Logging in is EXACTLY the same for all 3.

Option #1 - Logging in through the CSUF Portal, https://my.fullerton.edu/Portal/Dashboard/

1) On the CSUF Portal, Faculty can access Interfolio by selecting it under the "more apps" section on the left-hand side of the screen
2) It is recommended that you click the star ⭐ next to the app, which will put it in your "favorites" and keep it more readily available for future reviews.

3) Once you have clicked the "Interfolio" app you will be directed to the screen below:

This app is now in my favorites list, because I clicked the ⭐.
a) On this screen, you will get a description of both Interfolio as it is used as an evaluation system and its corresponding product "Dossier"
   i) Dossier is a digital safe where you can store your documents that you submit for your reviews and utilize them for future reviews

4) Click the blue-button "Interfolio Login" and that will redirect you to Interfolio's login page and Interface

Option #2 - Sign in using the hyperlinked button in the email that came from noreply@interfolio.com

1) When you receive access to an Interfolio case an email will be sent from through the Interfolio Platform from noreply@interfolio.com
2) To login
   a) Click the button “Review Candidate” and follow the steps in the Process portion

Option #3 - Go Directly to the Interfolio login page and favorite this website in your preferred Internet browser, https://account.interfolio.com/login?logout_message=sso
Process:

1) Click the “Partner Institution” Button
   a) **IGNORE** the "email*" and “password*” options
      i) Using these options will only cause frustration and waste your time
2) Enter search term “full” in the search box
3) Select California State University – Fullerton from the dropdown menu
4) Click “Sign In”
5) Enter CSUF credentials and Duo Authentication (if needed)
   a) *Please keep in mind that all Interfolio cases for faculty serving as reviewers are assigned cases based on their most current email address.*
Step #1: Click the "Partner Institution" button.

Step #2: Search for your institution name in the box provided.

Step #3: Click this option.
How to Find your Assigned Cases in Interfolio

After you login to Interfolio you will be redirected to your Interfolio user home page, from where you can find the cases currently assigned to you as a reviewer

Process:
1) Go the left-hand menu in the Interfolio platform, click “Cases”

![Interfolio Cases Menu](image1)

2) Once redirected you can search for the cases assigned to you either by using the search box, or by using the filter options
   a) Search box:

![Interfolio Search Box](image2)

   b) Filter options:
c) All search results will be displayed like the screen shot below:
   i) Click on the name of the faculty member to open any case you would like to work on
   ii) Be aware of the due date for each case and the status
       (1) The status will tell you the volume of material a particular faculty member should be submitting
3) Cases assigned to you as a reviewer can also be found on the Interfolio Home page dashboard.

Check the case for completeness:
For each portfolio assigned to you as a Department Chair, there will be a Post Tenure Review status given; you will need to make sure that the correct volume of documentation has been submitted for each Post Tenure Review.

1) Post Tenure Reviews (PTRs) are supposed to occur every 5 years after a faculty member submits his or her RTP portfolio for either Tenure & Promotion to Associate Professor or Promotion to Full Professor.

a) If a PTR has not been conducted every five years then the period of review will cover the amount of time that has passed between the day after the faculty member submitted their portfolio for their last evaluation through the submission deadline of the current academic year.

b) Make sure to forward the case to the combo Dean & PTRC review level by the deadline published in the annual PTR timetable provided by FAR.
How to address missing materials from the Portfolio

Sometimes a faculty member will forget to upload something as part of his or her Portfolio. It is your job as Chair to check for any missing material **BEFORE** declaring the portfolio complete, and address it in the following manner.

1) Go to the section in the Candidate Packet that has the missing material and “Unlock” it

   ![Candidate Packet](image)

   Click this for ALL sections that have missing material

2) Email the faculty member, whose packet it is, and inform them of the following:
   a) What items are missing from which section
   b) That you have unlocked the section(s) where they need to upload the missing items
   c) He or she will need to log back into Interfolio, upload the missing material, and re-submit the section(s) that have been opened
   d) Give the faculty member a deadline to complete the task, because you as the Chair have to forward the case to the Departmental Review level by a date specified in the Annual Timetables provided by FAR
How To Forward Your Cases to the Next review level

As an PTR Reviewer there are 2 methods to move submitted portfolios to the next review level, by the annual deadline published in the FAR evaluation time tables:

Method #1: Moving cases forward on an individual basis
   a) After logging in, click on an individual faculty name to open a case that has been assigned to you as a reviewer using the methods described in the earlier section about how to find your assigned cases:
      i) Search for them on your “Home” page
      ii) Search for them under “Cases” using either
         (1) The search box
         (2) The filter options

         Use this to find cases

   b) Click on the faculty member’s name to open a case, that has been assigned to you
      i) Then click the blue “send case” button at the top right-hand corner of the screen
      ii) Finally click the “Forward To PTRC and Dean Review” option from the drop down menu

OR use this to find cases

Click HERE to open a search result
iii) After Clicking the “Forward to…” option make sure to keep the “send message” option checked and fill in the required parts of the message
iv) Then click “continue”
Method #2: Moving multiple cases forward at the same time

Please NOTE: this method for moving cases forward is very useful if the Interfolio server is slow in opening up individual cases or if the Send Case button is non-responsive

1) Process:
   a) Step 1: Use the Filter options to find all cases that are assigned to you
   b) Step 2: Check the checkboxes either next to the faculty names or check the check box at the top of the filtered results
      i) All required documents have to be fulfilled before this step can be completed for all cases selected
   c) Step 3: Click “Send Forward”
      
      d) Step 4: Make sure that the “send a message” option is checked and fill in the required parts of the message
   e) Step 5: Click “Send”
Step #4, make sure this is checked

Fill this in

Edit message if you want

Step #5, click here to complete the forwarding process
PTRC and Dean Review Level

PTRC Role

Responsibilities for the Review Step:
1) Login
2) Evaluate the submitted material in each case for strengths and weakness in teaching, scholarship, and service.
3) Compose a Written Statement about the faculty member's performance and future goals
   a) Please use the PTR Statement template provided by FAR
4) Fulfilling the Required Document Section with the completed Written Statement by the deadline published in the annual PTR timetable
5) Informing the Dean when the PTR Statement is completed and uploaded

*PLEASE NOTE: FAR will not be creating binders this year, all paperwork that would normally have to go into the binder will be assigned as “Required Documents” at each review level. The process for satisfying these requirements will be discussed below

How to Log in
To Log in to Interfolio there are 3 options to choose from, but the Process of Logging in is EXACTLY the same for all 3.

Option #1 - Logging in through the CSUF Portal, https://my.fullerton.edu/Portal/Dashboard/

1) On the CSUF Portal, Faculty can access Interfolio by selecting it under the "more apps" section on the left-hand side of the screen
a) It is recommended that you click the star ✰ next to the app, which will put it in your "favorites" and keep it more readily available for future reviews.
2) Once you have clicked the "Interfolio" app you will be directed to the screen below

a) On this screen, you will get a description of both Interfolio as it is used as an evaluation system and its corresponding product "Dossier"
i) **Dossier** is a digital safe where you can store your documents that you submit for your reviews and utilize them for future reviews, however it is not pertinent to Reviewers.

3) Click the blue-button "Interfolio Login" and that will redirect you to Interfolio's login page and Interface.

**Option #2** – Sign in using the hyperlinked button in the email that came from noreply@interfolio.com

1) When you receive access to an Interfolio case an email will be sent from through the Interfolio Platform from noreply@interfolio.com

2) To login
   a) Click the button “Review Candidate” and follow the steps in the Process portion.
Option #3 - Go Directly to the Interfolio login page and favorite this website in Google Chrome, Firefox, or Safari, https://account.interfolio.com/login?logout_message=sso

Process:
1) Click the “Partner Institution” Button
   a) **IGNORE** the "email*" and “password*” options
      i) Using these options will only cause frustration and waste your time
2) Enter search term “full” in the search box
3) Select California State University – Fullerton from the dropdown menu
4) Click “Sign In”
5) Enter CSUF credentials and Duo Authentication (if needed)
Step #2

Step #3, select this option

Step #4
Evaluating Submitted Material

1) Open a case assigned to you as a reviewer
   a) You can find these tasks on your Interfolio Home Page or using the Search or Filter options on the Cases page

b) “Case” Screen Options
c) Click on a name to open a case to read the material
   i) Be aware of the PTR status and Timetable for each case

   ii) Click “read case” to view materials for evidentiary support for your written statements.

   d) Use the following functions to move through submitted material and to annotate if desired
Fulfilling the Required Document with Completed PTR Statement

FAR has created a new template for Reviewers to use during the PTR Cycle, please use them for ALL PTR Reviews in the upcoming academic year:

- This statement will need to be uploaded as a “required document” before the case can be forwarded to the next review level

To fulfill the “Required Document” condition

1) Look for the number next to the “Case Details” tab in each case, and click “case details”
2) OR scroll down to where a box with a purple exclamation is located and click “view”

a) After clicking one of the options listed above, read the instructions available for each review step
b) These instructions will tell you what is expected of you, provide links to useful resources, and list the deadline by which the case must be forwarded to the next review level
c) NOTE: Make sure to click on the ">" next to "Instructions to expand the section and read the available instructions for your review level if it is not already expanded

3) Just below the instructions box is the "required documents" box where you will upload the required documents for this review step
a) *PLEASE NOTE: the required document must be uploaded through this SPECIFIC DIALOG BOX. Simply adding the document to the internal case section specified in the instructions WILL NOT SATISFY the REQUIREMENT
i) As a result the case WILL NOT BE ABLE TO BE forwarded

Process
b) Step 1: To upload the completed PTR Statement, Click "+Add"
c) Step 2: Click "Browse to Upload"
d) Step 3: Select your document
   i) Give it a CLEAR and LOGICAL naming convention
e) Step 4: Leave the selected section as "Written Statements from PTRC and Dean"
f) Step 5: Click "+Add"
g) Step 6: Check to make sure the upload was successful
Required Items

All required items 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.

 PTRC Written Statement

The Department Chair is required to upload the PTRC's brief written statement on the candidate's strengths and weaknesses to the "Written Statements from PTRC and Dean" section by the deadline of Friday, December 4, 2020. You do not have to share this with the candidate (the Dean will do so after they finish their written statement). Also, please DO NOT send this case forward (that is the Dean's responsibility and they would lose access if you did so).

No files have been added to this section.

Add PTRC Written Statement

Upload a new file  Select file from case

Drag & Drop your files anywhere or

Browse To Upload

Step #1  Add

Step #2
h) If a mistake was made or you need to make a change to the document that you uploaded
   i) Step 1: Click the pencil
   ii) Step 2: Then select the option from the drop down menu that best suits your needs
   i) PLEASE NOTE: If you remove the document from the requirement or delete it a new document
      will have to be uploaded BEFORE the case can be forwarded
Notifying the Dean when Duties are complete

When the PTRC’s completed PTRC Statement uploaded into the “Required Document” box, the PTRC Chair will need to contact the Dean, to let them know.

This can be done in any number of ways:

a) Zoom  
b) Email  
c) Text message

Choose which one suits you best.
Dean Role

Responsibilities for the Review Step

1) Login
2) Evaluate the submitted material in each case for strengths and weaknesses in teaching, scholarship, and service.
3) Compose a Written Statement about the faculty member’s performance and future goals
   a) Please use the PTR Statement template provided by FAR
4) Fulfilling the Required Document Section with the completed Written Statement by the deadline published in the annual PTR timetable
5) Hold meetings with all faculty members undergoing a PTR per the faculty member’s preference in the Interfolio case data form
   a) This must be done by the deadline published in the annual PTR timetable
6) Sharing copies of the completed PTR statements from both review committees in the PTR process via Interfolio
7) Run the 10-calendar day rebuttal period after the meeting with each faculty member has been concluded
8) Forward the case to FAR by the 10 calendar days after the rebuttal period has been initiated for final processing

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6) Click the blue-button "Interfolio Login" and that will redirect you to Interfolio's login page and Interface.

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3) When you receive access to an Interfolio case an email will be sent from through the Interfolio Platform from noreply@interfolio.com

4) To login

a) Click the button “Review Candidate” and follow the steps in the Process portion.
Option #3 - Go Directly to the Interfolio login page and favorite this website in Google Chrome, Firefox, or Safari, https://account.interfolio.com/login?logout_message=sso

Process:
6) Click the “Partner Institution” Button
   a) IGNORE the "email*” and “password*” options
      i) Using these options will only cause frustration and waste your time
7) Enter search term “full” in the search box
8) Select California State University – Fullerton from the dropdown menu
9) Click “Sign In”
10) Enter CSUF credentials and Duo Authentication (if needed)
Step #2

Step #3, select this option

Step #4
Step #5
Evaluating Submitted Material

1) Open a case assigned to you as a reviewer
   a) You can find these tasks on your Interfolio Home Page or using the Search or Filter options on the Cases page

   ![Interfolio Home Page Image]

b) “Case” Screen Options

   ![Cases Screen Image]
c) Click on a name to open a case to read the material
   i) Be aware of the PTR status and Timetable for each case

ii) Click “read case” to view materials for evidentiary support for your written statements.

d) Use the following functions to move through submitted material and to annotate if desired
Fulfilling the Required Document with Completed PTR Statement

FAR has created a new template for Reviewers to use during the PTR Cycle, please use them for ALL PTR Reviews in the upcoming academic year:

- This statement will need to be uploaded as a “required document” before the case can be forwarded to the next review level

To fulfill the “Required Document” condition

1) Look for the number next to the “Case Details” tab in each case, and click “case details”
2) OR scroll down to where a box with a purple exclamation is located and click “view”

After clicking one of the options listed above, read the instructions available for each review step

- These instructions will tell you what is expected of you, provide links to useful resources, and list the deadline by which the case must be forwarded to the next review level
c) **NOTE:** Make sure to click on the ">" next to "Instructions to expand the section and read the available instructions for your review level if it is not already expanded.

3) Just below the instructions box is the "required documents" box where you will upload the required documents for this review step.

a) *PLEASE NOTE: the required document must be uploaded through this SPECIFIC DIALOG BOX. Simply adding the document to the internal case section specified in the instructions WILL NOT SATISFY the REQUIREMENT*

i) As a result the case WILL NOT BE ABLE TO BE FORWARDED

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**Process**

b) Step 1: To upload the completed PTR Statement, Click "+Add"

c) Step 2: Click "Browse to Upload"

d) Step 3: Select your document

i) Give it a CLEAR and LOGICAL naming convention

e) Step 4: Leave the selected section as "Written Statements from PTRC and Dean"

f) Step 5: Click "+Add"
g) Step 6: Check to make sure the upload was successful
h) If a mistake was made or you need to make a change to the document that you uploaded
   i) Step 1: Click the pencil
   ii) Step 2: Then select the option from the drop down menu that best suits your needs

   **PLEASE NOTE:** If you remove the document from the requirement or delete it a new document will have to be uploaded BEFORE the case can be forwarded
Hold meetings with all faculty members undergoing a PTR per the faculty member’s preference in the Interfolio case data form

1) As part of the Interfolio packet the faculty member under review will have filled out a form indicating their preference for how to conduct their end-of-cycle meeting.
   a) Check the form when reading the case materials for each post-tenure review to see what each faculty member’s preference is.
   
   ![Packet Form]

   b) Set up the end of the cycle meeting with each faculty member using any method that works best for you:
      i) Some examples
         (1) Zoom
         (2) FaceTime
         (3) Google Hangouts
   c) Once the meeting date has been confirmed, share the completed PTR Statements with the candidate using the method described below
      i) Also, set the rebuttal period deadline for 10-calendar days after the scheduled meeting date.
         (1) If the 10th calendar day happens to fall on a weekend, select the Monday after.
Sharing copies of the completed PTR statements with Faculty Member under review

1) Once you as the Dean have uploaded your completed PTR statement and set the end of cycle meeting date with the faculty member, it is time to share it and the one completed by the PTRC with the candidate.

2) Message Template

Hello Professor [insert name],

I am sharing copies of the PTR statements composed by your PTRC and myself. Please read these documents prior to our scheduled meeting at the end of the Post Tenure Review Evaluation Cycle. Once the end of the cycle meeting has concluded, you will have 10 calendar days to submit your completed PTR rebuttal form as a "response" to the documents shared with you.

Sincerely,

[insert name]

College Dean

Process:

a) Step 1:
   i) Either go to the “Case Materials” page for each case and click “share”
   ii) OR Stay on the “Case Details” page for each case, click the “case options” button, select “email candidate” from the drop down menu

b) Step 2: Fill in the required Subject and Message portions
   i) The message is completely personal you will need create your own or you can use the template above.
   ii) The message must include the following:
      (1) What’s being shared
      (2) A link to the PTR Rebuttal form
      (3) The deadline to submit a copy of the rebuttal form and/or rebuttal statement, once the end of cycle meeting has concluded
         (a) THIS IS A HARD DEADLINE, once this deadline has passed the window to rebut has closed and emailed copies of the rebuttal statements will not be accepted
   iii) Step 3: Add the necessary files that need to be shared
   iv) Step 4: Enable a file response
   v) Step 5: Select a deadline 10 calendar days from when you are intending to conduct the end of cycle meeting
      (1) If 10 calendar days out falls on a weekend, select the Monday after
   vi) Step 6: Select “rebuttal/meeting response” as the section for the Response to go into
   vii) Step 7: Click “send”
Step #1, option i
Click here 1st

Click here 2nd

Click here last

Step #1, option ii
Click here 1st

Click here last
Step #2

Step #3, click the blue + to get documents to this list
Step #4

Direct email reply:
mpns@fullerton.edu

File Response
☑ Enable

When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

Step #5

Message Reason
post-meeting rebuttal

Deadline
Oct 9, 2020

Step #6

Section for Response *
Rebuttal/Meeting Response

Step #7

Send
How To Forward Your Cases to the Next review level
When the 10-calendar timeframe for the rebuttal period has passed or the faculty member has submitted a completed PTR rebuttal form as a “response” to the PTR documentation that was shared. The Case will need to be forwarded to FAR for final processing.

As a PTR Reviewer there are 2 methods to move submitted portfolios to the next review level, by the annual deadline published in the FAR evaluation time tables:

Method #1: Moving cases forward on an individual basis
   c) After logging in, click on an individual faculty name to open a case that has been assigned to you as a reviewer using the methods described in the earlier section about how to find your assigned cases:
      i) Search for them on your “Home” page
      ii) Search for them under “Cases” using either
           (1) The search box
           (2) The filter options

d) Click on the faculty member’s name to open a case, that has been assigned to you
   i) Then click the blue “send case” button at the top right-hand corner of the screen
   ii) Finally click the “Forward To PTRC and Dean Review” option from the drop down menu
iii) After Clicking the “Forward to…” option make sure to keep the “send message” option checked and fill in the required parts of the message
iv) Then click “continue”
Method #2: Moving multiple cases forward at the same time

Please NOTE: this method for moving cases forward is very useful if the Interfolio server is slow in opening up individual cases or if the Send Case button is non-responsive.

2) Process:
   a) Step 1: Use the Filter options to find all cases that are assigned to you
   b) Step 2: Check the checkboxes either next to the faculty names or check the check box at the top of the filtered results
      i) All required documents have to be fulfilled before this step can be completed for all cases selected
   c) Step 3: Click “Send Forward”
      d) Step 4: Make sure that the “send a message” option is checked and fill in the required parts of the message
   e) Step 5: Click “Send”
Step #4, make sure this is checked

Fill this in

Edit message if you want

Step #5, click here to complete the forwarding process