RTP Candidate Guide

PREPARED BY THE FAR OFFICE, CSUF
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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
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

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 “View Case” 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 #2

Step #3, Click this option

Step #4
How to find your assigned review packet for the current RTP cycle

After Logging into Interfolio following one of the two options outlined in the Log-in tutorial, CSUF faculty undergoing review, will be redirected to the "Home" page of their Interfolio User Profile

Interfolio Home Screen:

1) On the "Home" screen will be a list of "My Tasks", otherwise known as review packets, which have been created for you to submit documents for your various types of reviews.

   a) Your review committees **CANNOT** see any of your portfolio or evaluation materials until they are uploaded and submitted through one of these review packets.
b) So even if you have uploaded your documents into Interfolio's corresponding product "Dossier," your reviewers will **NOT** have access to those materials until they are submitted through one of these packets.

2) To open a packet to add material from this screen click either your **hyperlinked name**
   a) *A tutorial on how to add materials to a review packet will be included in a later chapter*

---

**Interfolio “Your Packets” Screen:**

1) Review packets can also be located under “Your Packets” in addition to the “Home” Screen after logging in, but there are some differences
   a) To open any packets from either of these two screen portions click either the **hyperlinked name of your department** or the **hyperlinked word “view”**

b) The “Your Packets” screen is divided into two parts:
   i) **Active** = these packets are OPEN
   ii) **Completed** = these are packets that have been previously submitted and provide you with a historical record of your evaluation submissions

c) The active portion of the “Your Packets” screen:
2) The only portion of the left-hand menu that you can ignore is the “Cases” option
   a) This option only becomes important when you step into the role of the “reviewer” rather than the faculty member being reviewed
Active Review Packet Break Down:

1) Whether you open a review packet from the options on the “Home” screen or from the options on the “Your Packets” screen you will be directed to the screen below where you will be able to:
   a) See the packet in the default “overview” mode
   b) Be able to open the packet in “edit” mode

Click here or here to move into “Edit mode” where you can add materials to packets.
Adding Materials to a Review Packet from Personal Document Storage

Once you have opened your active review packet in from either your Interfolio Home page or "Your Packets" page it is time to start uploading your materials for evaluation.

For more in-depth information on how to Log in to Interfolio or how to find your Interfolio review packet please refer to their corresponding tutorials in previous chapters.

Tips for making uploading documents easier

• Have all your documents organized on your hard drive or in the Interfolio product Dossier **BEFORE** you start uploading
• Upload documents in small batches
  ○ This is particularly useful for SOQ data, so if files need to be rearranged they are in a manageable load
• Start uploading documents to your active Interfolio Review packets well in advance of the submission deadline.

Please **NOTE** the following:

• Any document type, Word Doc, Excel Table, etc. can be uploaded to Interfolio, the uploading process will take longer, depending on file size because Interfolio will automatically convert it to a PDF.
• The Interfolio platform has an automatic save function built-in
  ○ Documents do not need to be all uploaded at once and when they are uploaded they are automatically saved
• Documents are uploaded into the Interfolio platform by order of **File SIZE, not File NAME.**
  ○ The smallest documents will be uploaded first and the largest last
• **MP3** and **MP4** files are **not** supported by the Interfolio Platform
  ○ Video files can be submitted for evaluation, but they must be hosted on YouTube
  • More information on this uploading process below

Uploading Documents from Personal Document Storage:

**Method #1 – Single Document Uploads**

Process:

1) Step 1: Log in to Interfolio
2) Step 2: Click on your active review packets
  a) When you open an active review packet in Interfolio you are automatically redirected to that packet in **"Overview" mode**
3) Step 3: Click either Packet or Edit to get into “edit mode” to upload documents
4) Step 4: Once in "edit" mode scroll to the section you wish to add documents to and click the "Add" button
5) Step 5: In the add document dialog box, select the "add new file" option and then click “browse to upload”
6) Step 6: Go to where your documents are stored, select a **single document** and click “open” or double click on a **single document**
7) Step 7: Click the "+Add" button and the documents will be added to the section you are working in
  a) **NOTE:** documents cannot be moved from one section to another once they have been uploaded successfully to a review packet section.
  b) If you would like to add the same document to another review packet section, follow the procedure outlined above, in whatever section you choose.
Step 3: Click on either of these options

Step 4

This is the default page in this dialog box

Step 5
Method #2 – Multiple Document Uploads

Process:
1) Step 1: Log in to Interfolio
2) Step 2: Click on your active review packets
   a) When you open an active review packet in Interfolio you are automatically redirected to that packet in "Overview" mode
3) Step 3: Click either Packet or Edit to get into "edit mode" to upload documents
4) Step 4: Once in "edit" mode scroll to the section you wish to add documents to and click the "Add" button
5) Step 5: In the add document dialog box, select the "add new file" option and then click “browse to upload”

6) Step 6: Go to where your documents are stored, select a **several documents** and click “open”

   a) To select several Documents on a PC
      i) Hold the Ctrl button, then click the items

   b) To select several Documents on a Mac
      i) Press and hold the Command key, then click the items.

7) Step 7: Click the "+Add" button
   a) **NOTE:** documents cannot be moved from one section to another once they have been uploaded successfully to a review packet section.

   b) If you would like to add the same document to another review packet section, follow the procedure outlined above, in whatever section you choose.

---

![Step 3: Click on either of these options](image1.png)

![Step 4](image2.png)
Step 5

This is the default page in this dialog box.

Step 6

Drag & Drop your files anywhere or

Browse To Upload
Uploading Webpages from “Add New File” option
To upload a webpage to your Interfolio Review Packet follow the steps for adding a document under the “Add New File” option until step 5, but **DO NOT** click "browse to upload"

Process:
1) Step 1: click "webpages"
2) Step 2: Add in all necessary information marked with a red asterisk (*)
3) Step 3: Click the "+Add" button
Step 1

Choose Existing

Upload Video Webpage

Step 2

Title *

e.g. MUS 2 Fall 20

URL *

https://www

Description

Enter a description for your webpage...
Uploading YouTube Videos from the “Add New File” option

Process:
If you have never posted a video on YouTube please contact the Academic Technology Center (ATC) for help on the specifics of that process.

To upload a YouTube video to your review packet follow the steps for adding a document under the “Add New File” option until step 5, but **DO NOT** click "browse to upload"

1) Step 1: click "Videos"
2) Step 2: Add in all necessary information marked with a red asterisk (*)
3) Step 3: click the "+Add" button
Step 1: Choose Video

Step 2: Enter Title and URL

Step 3: Enter Description and Add Video
Adding Documents to a Review Packet Using Interfolio Tools

Once you have opened your active review packet in from either your Interfolio Home page or "Your Packets" page it is time to start uploading your materials for evaluation.

For more in-depth information on how to Log in to Interfolio or how to find your Interfolio review packet please refer to their corresponding tutorials available in previous chapters.

Tips for making uploading documents easier

• Have all your documents organized on your hard drive or in the Interfolio product Dossier **BEFORE** you start uploading
• Upload documents in small batches
  ○ This is particularly useful for SOQ data, so if files need to be rearranged they are in a manageable load
• Start uploading documents to your active Interfolio Review packets well in advance of the submission deadline.

Please **NOTE** the following:

• The Interfolio platform has an automatic save function built-in
  ○ Documents do not need to be all uploaded at once and when they are uploaded they are automatically saved
• Any document type, Word Doc, Excel Table, etc. can be uploaded to Interfolio, the uploading process will take longer, depending on file size because Interfolio will automatically convert it to a PDF.
• Documents are uploaded into the Interfolio platform by order of **File SIZE, not File NAME.**
  ○ The smallest documents will be uploaded first and the largest last
• **MP3** and **MP4** files are **not** supported by the Interfolio Platform
  ○ Video files can be submitted for evaluation, but they must be hosted on YouTube
  ○ More information on this uploading process below

Uploading Documents with Interfolio Tools:

There are several tools built into the Interfolio platform that help and speed up the document uploading process, especially for repeat Interfolio users.

To access these tools the steps are very similar to the ones for adding documents from your computer’s hard drive. It is actually when you are using the tools that the process differs.

Tools Available:

• All Materials
• Collections (Great for Dossier users)
• Packets (Great for repeat Interfolio users)

Process:

1) Step 1: Log in to Interfolio
2) Step 2: Click on your active review packets
   a) When you open an active review packet in Interfolio you are automatically redirected to that packet in "Overview" mode
3) Step 3: Click either Packet or Edit to get into “edit mode” to upload documents
4) Step 4: Once in "edit" mode scroll to the section you wish to add documents to and click the "Add" button

5) Step 5: Select the "Choose Existing" option in the Add Document Dialog box
   a) Under the "Choose Existing" option there are three tools for you to choose from
      i) All Materials (Default)
      ii) Collections
      iii) Packets

6) Step 6: Click the "+Add" button, when you are done selecting
All materials
This option contains all previously submitted materials arranged in Alpha-Numeric order regardless of submission date

- This option also has a search bar and filtering capabilities to narrow possibilities
Collections
If you have set-up document collections in Dossier this option will allow you to choose specific materials from a selected collection

- Once you have selected a Collection, the search bar and filter capabilities become available like they are in All Materials

These are the available collections that I created in my Dossier Account
Packets
Allows you to select specific review packets that were submitted previously and then choose materials from those packets to upload to your current case.

All of these hyperlinked titles are packets that have been submitted previously.

This is the collection I selected.

This is the document that I selected from that collection.
This is the document I selected from a previously submitted packet.

Click here to go to a different review packet.

Step 6
How To Use Interfolio’s Dossier Platform

As CSUF faculty you get access to 2 interfolio products:

1. Review, Promotion, and Tenure = platform where you upload and submit documents for your required evaluations
   a. When you log into Interfolio through the CSUF Portal it is the option button with the CSUF logo

2. Dossier = this is a digital safe where you can upload and organize documents for upcoming reviews
   a. It is also where your submitted documents live after you have submitted your review packets through the Review, Promotion, and Tenure platform
   b. When you log into Interfolio through the CSUF Portal it is the option button with the word "dossier" on it

Please NOTE: any documents stored in Dossier are NOT automatically uploaded to your active Review Packets in the Review, Promotion, and Tenure platform. Your documents will still need to be uploaded by you, the user.

- Documents stored in Dossier CANNOT be seen by your review committees until they are uploaded and submitted through Review, Promotion, and Tenure platform.
  - For more in-depth information on this please refer to the chapter on How to add documents from Dossier to a new review packet

Navigating to Dossier from a Review Packet:

1. Go to your name, written in white text, at the top right-hand corner of the screen, and click it.
   a. A drop-down menu should appear and you will need to select "Interfolio Dossier"

2. Clicking "Interfolio Dossier" will redirect you to the Dossier home screen

Click HERE 1st

Click HERE 2nd

Welcome back, Tuffy Titan

Your Action Items

FAR Document
California State University Fullerton | Other

Tuffy Titan
2019 - FAR - Sample Department | Sample Department | Review

Tuffy Titan
Due: Oct 1, 2019
Organizing materials in Dossier
Select either Materials or Collections to get started

Materials
1) Clicking “Materials” will redirect you here:

2) Within the Materials Screen you can do the following:
   a) Add files, by clicking the button below

   ![Add Files Button]

   b) The procedure for adding new files is the same as the one for adding new files to your Review Packet in the Retention, Promotion, and Tenure Platform

3) Tag, archive, and Add files to collections
   a) To perform these functions you must:
      i) Click the check or tick box next to a file name
4) Then select the action from the corresponding buttons

5) Filter documents, search for documents you have added or view your archived documents

6) Clicking on a hyperlinked title name within Materials will open the document into a new screen:

7) On this screen you can:
   a) Change the document title
   b) Share the document
   c) Download the document
8) Archive or Delete the Document by clicking "Other Options"

Collections
1) Clicking “Collections” will redirect you here:

2) Within the Collections screen you can do the following:
   a) Add new collections by clicking the button below:
i) Give the Collection a name and click "+Add"

3) Once a collection has been created and named you can:
   a) Share your collection with others
   b) Rename your collection
   c) Or Delete your collection if you are not happy with it
   d) To perform all these functions click "select" and choose an option from the drop-down menu

4) To add materials to a Collection, click on its name to open it
   
   a) Clicking on a collection name will redirect you here

   b) Once in a collection, you can:
   c) Add materials, and the process is the same as adding new materials to a review packet in the Review, Promotion, and Tenure platform

   d) Tag, remove, and archive materials
      (1) To perform these functions you must:
(a) Click the check or tick box next to a file name

(b) Then select the action from the corresponding button

(e) Filter documents or search for documents you have added

5) Clicking on a hyperlinked title name within Collections will open the document into a new screen:

6) On this screen you can:
   a) Change the document title
   b) Change the document tag or type
   c) Share the document
   d) Download the document
7) Archive or Delete the Document by clicking "Other Options"

8) To get back to the Review, Promotion and Tenure platform go up to where your name is written in white text in the upper right-hand corner of the screen and click it

   a) Then select "California State University - Fullerton" from the drop-down menu
How to Rearrange Documents in Interfolio

To rearrange documents that have already been uploaded into an active Interfolio packet section:

1) Make sure that you are first in "Edit" mode
   a) To get out of the default "overview mode" click either "packet" or "Edit":

2) Once in Edit mode scroll to the section where you will need to rearrange your documents:
3) Hover mouse over a hyperlinked document title until you see the mouse pointer become the "grabby hand" graphic
   a) The "grabby hand" is the one you will need to use to move your documents into a different order
      i) This graphic normally appears when your mouse pointer is in the space between the end of the uploaded document title and the date you uploaded the document

<table>
<thead>
<tr>
<th>Title</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Titan - ENGL_101-87_SOQ_Statistical_Report - Fall 2015</td>
<td>Added Sep 23, 2019</td>
</tr>
</tbody>
</table>

**NOTE:** Your mouse pointer will change between three graphics when moved over the titles of your uploaded documents.

To move a single document:
   b) Make sure your mouse pointer is the "grabby hand" graphic
   c) Click your mouse and hold down
   d) This should result in a blue box surrounding the document you want to move
4) Move your mouse up or down as needed
   a) The new position of the document being moved will be visually indicated by a dashed line in the shape of a rectangle
   b) When the document is in the desired position release the mouse

To Move **MULTIPLE** Documents
5) For PC users
   a) Hold the Ctrl button and click ALL the documents that you wish to move
   b) Scroll or move your mouse up or down as you need
   c) The new location of the selected documents will be visually indicated by a dashed line in the shape of a rectangle
   d) When the document is in the desired position release the mouse
6) For Mac users
   a) Hold the Command button and click ALL the documents that you wish to move
   b) Scroll or move your mouse up or down as you need
   c) The new location of the selected documents will be visually indicated by a dashed line in the shape of a rectangle
   d) When the document is in the desired position release the mouse
7) Repeat the above process with each document or set of documents that need to be reordered.
   a) For any technical issues with this process please contact the Interfolio Help team
      i) Email: help@interfolio.com
      ii) Phone: (877) 997-8807
      iii) Be sure to identify yourself as a Cal State Fullerton University Faculty member undergoing review
How to submit your uploaded material

Once you are done uploading, titling, and ordering the documents you wish to submit for evaluation for either an RTP or PTR portfolio, it is time to SUBMIT your packet.

Please NOTE: you need to be in the Interfolio product "Review, Promotion, and Tenure," NOT Dossier. You also need to be in your current Interfolio Review packet and in Edit mode

1) When you open your active or open review packet in Interfolio's Review, Promotion, and Tenure" product the default mode is "Overview"

   a) To get out of "overview" mode and into Edit mode click either "packet" or the "Edit" button in any of the review packet sections

2) Once you are in "edit mode" make sure that you have uploaded the minimum number of required documents to each section.

   a) There are 3 methods available to submit your Portfolio Materials
One Section at a time: Blue Submit Button

Submit All Sections at Once:

Submitting Groups of Packet Sections
3) Each submission method will require you to confirm submission since once review packet sections are submitted, you as the candidate can no longer edit or add to your Interfolio review packet.

4) Click "yes" to finalize the submission
   a) If you accidentally submit review packet sections before you are ready, an administrator will need to unlock the section(s) you need for you to work in them again
      i) Before your submission deadline, contact the FAR office
      ii) On and after your submission deadline, contact your department chair, he or she will be responsible for opening the sections you need to change
How to File a Rebuttal Response (Full Performance Reviews ONLY)

Throughout the RTP Process, your review committees will share copies of their Evaluation and Recommendation statements based on their assessment of your submitted materials.

As a faculty member you have the right to submit a written rebuttal response to these statements:

- The Rebuttal statement should **ALWAYS** be addressed to the next review committee that will receive your materials
- It should be professional and supply a well-reasoned argument to the next review committee
- You are given **10 calendar days**, after the receipt of copies of the Evaluation and Recommendation statements, to submit your rebuttal if you choose

Receipt of the Shared Documents:
1) Your review committees will be sharing copies of their Evaluations and Recommendations with you through the Interfolio platform.
   a) When this occurs you will receive an email that looks like this:

   ![Email Example]

   2) When you receive this email click the “View files” button to see what has been shared with you.

   3) There are 2 possibilities of where you will be redirected as a result of clicking “View Files”
Already Logged into Interfolio:

1) The Response due date is listed on the right, this is a **Hard Deadline**
2) Use the “previous material” and “next material” to toggle between the documents
3) To send a response click “send response”
   a) More detail on this process below
4) To get out of this screen click “Committee Files” up at the top right

Not Logged into Interfolio:

1) Log in
2) Go to the review packet that says “Open for Response

   i) Click on the review packet that is “open for response” to open it and go to the new “shared committee files” tab in the packet
b) Under that tab, you will see all the files that were shared with you by the committee member who sent the email.

**Timetable #2**

<table>
<thead>
<tr>
<th>Unit</th>
<th>Type</th>
<th>Candidate Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Department</td>
<td>Review</td>
<td>View Instructions</td>
</tr>
</tbody>
</table>

**Overview Packet** | **Shared Committee Files**

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

*Sent by Mary Pons on Jun 18, 2020*

<table>
<thead>
<tr>
<th>Shared File</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Evaluation_TuffyTimm</td>
<td>Copy to Dossier</td>
</tr>
<tr>
<td>DPC Recommendation</td>
<td>Copy to Dossier</td>
</tr>
<tr>
<td>DPC Evaluation</td>
<td>Copy to Dossier</td>
</tr>
</tbody>
</table>

Click any of these to read contents

i) You scroll to the one that is open for response
ii) Click on the **hyperlinked title** of any of the shared files listed to read them.

3) Screenshot of reading shared documents:

```
**Viewing Files**

DPC Evaluation
```

i) Decide whether or not you would like to respond with a rebuttal
ii) Download the [RTP Rebuttal form](#) from the FAR website and fill it out with your decision

**PLEASE NOTE:** Regardless of whether or not you would like to exercise your right to submit a written rebuttal response you will need to fill out the RTP rebuttal form and submit it as your “response” to the documentation that was shared with you.

**Submitting your response:**
After completing the steps above and filling out the RTP Rebuttal Form you will need to upload the completed RTP Rebuttal form as your “response”

To submit a response to shared documentation:
1) Click “send response” either [here](#):
2) OR here:

Option #1 to submit a response, click here

Option #2 to send a response, click here

3) A new dialog box will pop up as a result of clicking “Send response”
a) Fill in the required document title (*)
   i) Please use a clear and logical naming convention
b) Click browse to upload
c) Upload your completed RTP Rebuttal form
d) Click “Send”

**Things to keep in mind:**
4) The deadline listed for the response is a **HARD deadline**, once that passes the window to submit a rebuttal closes and **CANNOT** be reopened
5) You can only upload 1 document as a “response” to shared documentation
   a) Please use the RTP Rebuttal form provided by FAR
   b) All written rebuttal responses will need to be placed in the proper location for them in the RTP Rebuttal form