RTP Reviewer Guide

PREPARED BY THE FAR OFFICE, CSUF
Table of Contents
Chapter 1: RTP Evaluation cycle workflow ................................................................. 3
Chapter 2: Department Chair Declares Complete ..................................................... 3
  Candidate Role: ........................................................................................................ 3
  Receiving the case: .................................................................................................... 3
  Responsibilities for this Review Step: ....................................................................... 4
  How to Login ............................................................................................................. 4
    Option #1 ................................................................................................................ 4
    Option #2 ................................................................................................................ 7
    Option #3 ................................................................................................................ 8
    Process .................................................................................................................... 8
  How to Find your Assigned Cases in Interfolio ....................................................... 11
    Alternative Process: ............................................................................................... 11
  Check the case for completeness: ............................................................................ 14
  How to address missing materials from the Portfolio .............................................. 16
  Uploading the Completed RTP Checklist to the “Required Items Box” ................. 16
    Process .................................................................................................................... 18
  How To Forward Your Cases to the Next review level ............................................ 22
    Method #1: Moving cases forward on an individual basis ................................... 22
    Method #2: Moving multiple cases forward at the same time ............................. 23
Chapter 3: Departmental Review .............................................................................. 26
  Department Chair .................................................................................................... 26
    Candidate Role: Responding to the Rebuttal Periods set up by the Department Chair .. 26
    Responsibilities for the Review Step: .................................................................... 26
    How to Login .......................................................................................................... 26
    Evaluating Submitted Material ............................................................................. 33
    Uploading the separate Chair Evaluation & Recommendation to the “Required Items” Box ................................................................. 35
    Conducting the Rebuttal Period through Interfolio ............................................. 35
    Sharing copies of any rebuttals filed with DPRC ................................................. 48
    Forwarding Case to the Dean by the deadline published in the annual RTP Timetables 51
  DPC ................................................................................................................................ 56
    Responsibilities for the Review Step: .................................................................... 56

1
Chapter 4: College Dean

Candidate Role:

Responsibilities for the Review Step

How to Log in

Option #1

Option #2

Option #3

Process:

Evaluating Submitted material

Uploading the Dean’s Evaluation/Recommendation to the “Required Items” box

To fulfill the “Required Document” condition

Process

Sharing Copies of the Dean’s Evaluation/Recommendation with Chair and DPC

Process

Conducting the Rebuttal Period through Interfolio

Sharing the Documentation with the Candidate

Process

Sharing Copies of any Rebuttals filed with Chair and DPC

To share a document with other committees through Interfolio

Forwarding case to FAR by the deadline published in the Annual RTP Timetables

Method #1: Moving cases forward on an individual basis

Method #2: Moving multiple cases forward at the same time

Appendix I: Tips for Annotating in Interfolio

Appendix II: DPC and Department Chair Evaluation Form

Appendix III: DPC and Department Chair Recommendation Form

Appendix IV: Dean Evaluation/Recommendation Form
Chapter 1: RTP Evaluation cycle workflow

Faculty Submission

Department Chair Declares Complete

Departmental Review

Dean Review

Final Decision by Provost

Chapter 2: Department Chair Declares Complete

Candidate Role:
Faculty members scheduled to undergo review within your department will need to perform the following task before their RTP portfolio becomes available to be declared complete

- Submit all review packet sections within the Interfolio by the deadline specified in the annual RTP Timetables provided by FAR

Receiving the case:
1) After the faculty member has submitted all sections of their Interfolio review sections you will be notified by Interfolio via email that a case is ready for your review.
   a) 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 the material is missing from the Portfolio:
      i) “Unlock” the sections with the missing material
      ii) Contact the faculty member instructing them to:
          (1) Upload the missing material
          (2) Re-submit the sections when they are done
          (3) Give them a deadline to complete the task
4) Forward all assigned cases to the Departmental Review Level by the deadline specified in the Annual RTP 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) Clicking the Interfolio App on the CSUF portal will redirect you to the page in the screenshot 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 "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 the 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)
How to Find your Assigned Cases in Interfolio

After you log in 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.

Alternative Process:
1) Another way to find your assigned cases is to go to the left-hand menu in the Interfolio platform, click “Cases”

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:
b) Filter options:

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuffy Titan</td>
</tr>
<tr>
<td>Sample Department</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type</th>
<th>Template Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review</td>
<td>2020 - FAR - Sample Department - Timetable #1</td>
<td>Probationary Year 2</td>
</tr>
</tbody>
</table>

Step 4 of 6: FAR confirmation | Jan 11, 2021

Click here 1st

Set filter parameters over here
c) All search results will be displayed like the screenshot 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
Check the case for completeness:
For each RTP portfolio assigned to you as a Department Chair, there will be a status given. This status will help you determine whether a faculty member has included the correct amount of documentation over the correct period of time.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Template Name</th>
<th>Status</th>
</tr>
</thead>
</table>
| Tuffy Titan     | Review | 2020 - FAR - Sample Department - Timetable  | Probationary Year 2
                 |        | #1                                            |                   |
| Tuffy Titan     | Review | 2020 - FAR - Sample Department - Timetable  | Probationary Year 4
                 |        | #2                                            |                   |

1) Period of Review Summary
2) Check the spreadsheets that the FAR office provides each year for your department, for other details such as:
   a) Service credit years awarded upon hire

<table>
<thead>
<tr>
<th>Abbreviated Reviews</th>
<th>Status Abbreviation</th>
<th>Interfolio Status</th>
<th>The minimum amount of Required Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PY3</td>
<td>Probationary Year 3</td>
<td>1 year or 2 semesters worth of material, dated between the submission deadline of the faculty member’s last full performance review and the submission deadline of the abbreviated review</td>
</tr>
<tr>
<td></td>
<td>PY5</td>
<td>Probationary Year 5</td>
<td>1 year or 2 semesters worth of material, dated between the submission deadline of the faculty member’s last full performance review and the submission deadline of the abbreviated review</td>
</tr>
<tr>
<td>Full Performance Reviews – ALWAYS Cumulative</td>
<td>Status Abbreviation</td>
<td>Interfolio Status</td>
<td>The minimum amount of Required Documentation</td>
</tr>
<tr>
<td></td>
<td>PY2</td>
<td>Probationary Year 2</td>
<td>1 year or 2 semesters worth of material, from the date of hire to the submission deadline of the full performance review</td>
</tr>
<tr>
<td></td>
<td>PY3-FR</td>
<td>Probationary Year 3 with Full Review</td>
<td>2 years or 4 semesters worth of material, from the date of hire to the submission deadline of the full performance review</td>
</tr>
<tr>
<td></td>
<td>PY4</td>
<td>Probationary Year 4</td>
<td>3 years or 6 semesters worth of material, from the date of hire to the submission deadline of the full performance review</td>
</tr>
<tr>
<td></td>
<td>PY5-FR</td>
<td>Probationary Year 5 with Full Review</td>
<td>4 years or 8 semesters worth of material, from the date of hire to the submission deadline of the full performance review</td>
</tr>
<tr>
<td></td>
<td>PY6</td>
<td>Probationary Year 6</td>
<td>5 years or 10 semesters worth of material, from the date of hire to the submission deadline of the full performance review</td>
</tr>
<tr>
<td></td>
<td>Tenured</td>
<td>Promotion to Professor</td>
<td>However many semesters have passed since the day after the full performance evaluation for Tenure &amp; Promotion was submitted - the submission deadline of the full performance review for Promotion Consideration</td>
</tr>
</tbody>
</table>
b) Whether any faculty members have applied for early decisions such as Early Tenure, Early Promotion to Associate Professor, or Early Promotion to Full Professor
   i) These early decisions will be indicated in the Interfolio Status, but the Faculty member’s current probationary year will be indicated on the spreadsheet the FAR sends

   c) What timetable each case is on

How to address missing materials from the Portfolio
Sometimes a faculty member will forget to upload something as part of his or her RTP 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)

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 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 RTP Timetables provided by FAR

Upload the Completed RTP Checklist to the “Required Items Box”
Once you have checked the RTP portfolio for completeness and any missing items have been successfully submitted, you will need to fill out your portion of the RTP portfolio checklist.

1) This checklist would have been emailed to you by each faculty member
2) You will need to fill out these portions
a) The “previous evaluations” box only needs to be checked for those faculty members **NOT** undergoing their first full-performance review.

3) After filling in your name and adding the date to the RTP checklist, the checklist will need to be uploaded to the Required Items box on the “Case Details” page of EACH case to fulfill the required document condition

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

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

c) 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
d) 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

4) Just below the instructions box is the "required items" box where you will upload the required document review step
   a) *PLEASE NOTE: the required documentation 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, you WILL NOT BE ABLE TO FORWARD THE CASE

Process
1) Step 1: To upload the completed RTP Checklist, Click "+Add"
2) Step 2: Click "Browse to Upload"
3) Step 3: Select your document
4) Step 4: Leave the selected section as "Evaluation Documents"
5) Step 5: Click "+Add"
6) Step 6: Check to make sure the upload was successful
7) If a mistake was made or you need to make a change to the document that you uploaded
   a) Step 1: Click the pencil
   b) Step 2: Then select the option from the drop-down menu that best suits your needs
8) 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
by the candidate. When uploading, save this document.

Step #1

Edit Details
Remove from Requirement
Delete Document

Step #2, select an option
How To Forward Your Cases to the Next review level

As an RTP 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

1) 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:
   a) Search for them on your “Home” page
   b) Search for them under “Cases” using either
      i) The search box
      ii) The filter options

   Process:
   1) Step 1: Find the case you want to forward
   2) Step 2: Click the Faculty member’s name to open the case
   3) Step 3: Click the blue “send case” button at the top right-hand corner of the screen
   4) Step 4: Click the “Forward Departmental Review” option from the drop-down menu
   5) Step 5: After Clicking the “Forward to…” option keep the “send message” option checked and fill in the required parts of the message
   6) Step 6: 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.

Process:
1) Step 1: Use the Filter options to find all cases that are assigned to you
2) Step 2: Check the checkboxes either next to the faculty names or check the check box at the top of the filtered results
   a) All required documents have to be fulfilled before this step can be completed for all cases selected
3) Step 3: Click “Send Forward”

4) Step 4: Make sure that the “send a message” option is checked and fill in the required parts of the message
5) 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
Chapter 3: Departmental Review
Department Chair

Candidate Role: Responding to the Rebuttal Periods set up by the Department Chair

Responsibilities for the Review Step:

1) Login
2) Evaluate the submitted material in each case against the appropriate DPS criteria
3) Compose SEPARATE Evaluation & Recommendation Statements
4) Uploading your SEPARATE Evaluation & Recommendation Statements to the “required items” box on the “Case Details” page of each assigned case
5) Conducting the Rebuttal Period through Interfolio
   a) Stage #1: DPC Evaluation, DPC Recommendation, & Chair Evaluation
   b) Stage #2: Chair Recommendation
6) Informing DPC of any rebuttals filed
7) Forwarding Case to the Dean by the deadline published in the annual RTP Timetables

*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

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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, but it is not pertinent for an RTP reviewer
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 your preferred Internet browser, https://account.interfolio.com/login

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 the 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)
Evaluating Submitted Material

1) Find the cases assigned to your committee, these will be listed as:
   a) tasks on the Interfolio user Home page

   ![Image of Interfolio user Home page]

   b) Search results on the “Cases” page

   ![Image of Interfolio Cases page]

2) Click on a name to open a case to read the material
   a) Be aware of the due date and RTP Status of each case
b) After opening the case, click “read case” to view materials for evidentiary support for your Evaluation statement.

c) Use the following functions to move through submitted material and to annotate if desired.
Uploading the separate Chair Evaluation & Recommendation to the “Required Items” Box

FAR has created 2 new templates for Reviewers to use during the RTP Cycle, please use them for ALL Full Performance RTP Reviews in the upcoming academic year:

- **RTP Evaluation Form**
- **RTP Recommendation Form**
- These statements are **REQUIRED** to be **SEPARATE** documents by UPS 210.000 and the “required documents” in Interfolio reflect that

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 mark 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 documentation 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, you WILL NOT BE ABLE TO FORWARD THE CASE

Process:
1) Step 1: To upload the SEPARATE Evaluation and Recommendation Statements, Click "+Add"
2) Step 2: Click "Browse to Upload"
3) Step 3: Select your document
   a) Give it a CLEAR and LOGICAL naming convention
4) Step 4: Leave the selected section as "Evaluation Documents"
5) Step 5: Click "+Add"
6) Step 6: Check to make sure the upload was successful
Step #2

Step #3

Step #4

Step #5
7) If a mistake was made or you need to make a change to the document that you uploaded
   a) Step 1: Click the pencil
   b) Step 2: Then select the option from the drop-down menu that best suits your needs

8) 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
Conducting the Rebuttal Period through Interfolio

1) As part of the RTP process, each faculty member has the right to rebut either, both, or none of the evaluation and/or recommendation statements that are produced by the DPC and the Department Chair
   a) This decision must be indicated by the faculty member using the FAR RTP Rebuttal form, and that form, along with any rebuttal statements must be uploaded to Interfolio using the process below

2) As Department Chair is it your responsibility to ensure that each faculty member in your department receives a copy of the appropriate documentation published in the FAR Annual RTP Timetables.

3) The Rebuttal Period lasts for **10 CALENDAR DAYS** after a copy of the appropriate documentation is provided to the faculty member under review
   a) If the faculty member does not submit a rebuttal within the timeframe given they are **NOT** allowed to do so through an outside email **NOR** are extensions to be given.

4) In the Departmental Review, there are **2** rebuttal stages
   a) Each has its own set of documentation and its own deadline listed in the Annual RTP Timetables

**Stage #1: DPC Evaluation, DPC Recommendation, & Chair Evaluation**

1) Once you as the Department Chair have uploaded your evaluation statement and the DPC has uploaded their SEPARATE Evaluation and Recommendation statements it is time to share them with the candidate
   2) Message template:

   Dear Professor [insert name],

   Your rebuttal period for the DPC's Evaluation, the DPC's recommendation, and the Department Chair's Evaluation has been initiated. Above this message is a button that will allow you to see the documents that have been shared with you. You will need to log into Interfolio, open to your most recently submitted review packet, and within that review, packet click the tab labeled "Shared Committee Files".

   You will be able to see and read all the documents shared with you under "Shared Committee Files". Please indicate whether or not you would like to submit a rebuttal using the RTP Rebuttal Form provided by FAR, as your "Response" to the files shared with you. If you wish to submit a rebuttal statement, please follow the instructions for doing so on the rebuttal form.

   You have until [insert date] to file a "response" to the files shared with you under "Shared Committee Files". Once this deadline has passed on [insert date], the rebuttal window will be closed. Rebuttal statements **NOT** filed using this method through Interfolio or after the deadline listed will not be accepted.

   Sincerely,
Process:
1) Step 1:
   a) Either go to the “Case Materials” page for each case and click “share”
   b) OR Stay on the “Case Details” page for each case,
      i) Click the “case options” button,
      ii) select “email candidate” from the dropdown menu
2) Step 2: Fill in the required Subject and Message portions
   a) The message is completely personal, you can use the template above or create your own
   b) The message must include the following:
      i) What’s being shared
      ii) A link to the FAR RTP Rebuttal form
      iii) The deadline to submit a copy of the rebuttal form and/or rebuttal statement
         (1) **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
3) Step 3: Scroll down to where it says “Share Files” and click “+Add”
4) Step 4: Add the necessary files that need to be shared by clicking the blue + next to the document title
5) Step 5: Enable a file response
6) Step 6: Select a deadline 10 calendar days from when you are sending the email
   a) If the 10th calendar day falls on a weekend, select the Monday after
7) Step 7: Select “rebuttal/meeting response” as the section for the Response to go into
8) Step 8: Click “send”
Step #1, option ii
Click here 1st
Click here last

Message to Candidate

To
Tuffy Titan (far@fullerton.edu)

Subject
Rebuttal Period for DPC Evaluation, DPC Recommendation, & Department Chair Evaluation

Message

You will be able to see and read all the documents shared with you under “Shared Committee Files”. Please indicate whether or not you would like to submit a rebuttal using the RTP Rebuttal Form provided by FAR, as your “Response” to the files shared with you. If you wish to submit a rebuttal statement, please follow the instructions for doing so on the rebuttal form.

You have 10 calendar days from the receipt of this email to file a “response” to the files shared with you under “Shared Committee Files”. Once this deadline has passed on July 16, 2020, this rebuttal window will be closed. Rebuttal statements NOT filed using this method through Interfolio or after the deadline listed will not be accepted.

Sincerely,

File shared with this message can be viewed by the recipient(s) after logging into Interfolio.

Step #2

Step #3
Step #4, click the blue + to add documents to the message as attachments.
Stage #2: Chair Recommendation

1) Once you, the Chair, have finished your *SEPARATE* Recommendation statement it is time to share it with the candidate the same way you did in the Stage #1 Rebuttal

2) *Message Template*

Dear Professor [insert name],

Your rebuttal period for the Department Chair's Recommendation has been initiated. Above this message is a button that will allow you to see the document that has been shared with you. You will need to log into Interfolio, open to your most recently submitted review packet, and within that review, packet click the tab labeled "Shared Committee Files".

You will be able to see and read the document that was shared with you under "Shared Committee Files". Please indicate whether or not you would like to submit a rebuttal using the [RTP Rebuttal Form](#) provided by FAR, as your "Response" to the files shared with you. If you wish to submit a rebuttal statement, please follow the instructions for doing so on the rebuttal form.

You have until [insert date] to file a "response" to the files shared with you under "Shared Committee Files". Once this deadline has passed on [insert date], the rebuttal window will be closed. Rebuttal statements NOT filed using this method through Interfolio or after the deadline listed will not be accepted.

Sincerely,

[insert name]

Department Chair
**Process:**

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

2) **Step 2:** Fill in the required Subject and Message portions
   a) The message is completely personal, you can use the template above or create your own
   b) The message must include the following:
      i) What’s being shared
      ii) A link to the FAR RTP Rebuttal form
      iii) The deadline to submit a copy of the rebuttal form and/or rebuttal statement
         (1) **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

3) **Step 3:** Scroll down to where it says “Share Files” and click “+Add”

4) **Step 4:** Add the necessary files that need to be shared by clicking the blue + next to the document title

5) **Step 5:** Enable a file response

6) **Step 6:** Select a deadline 10 calendar days from when you are sending the email
   a) If the 10th calendar day falls on a weekend, select the Monday after

7) **Step 7:** Select “rebuttal/meeting response” as the section for the Response to go into

8) **Step 8:** Click “send”
Step #1, option ii
Click here 1st

Step #2

Step #3

Step #4, click the blue + to add documents to the message as attachments
Step #5

**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.

**Message Reason**
- e.g. rebuttal, reminder

**Deadline**
- Jul 17, 2020

**Section for Response**
- Rebuttal/Meeting Response

Step #6

Step #7

Step #7

Send
Sharing copies of any rebuttals filed with DPRC
As part of the Evaluation Process, one of your responsibilities as the Department Chair is to provide copies of any rebuttals filed in response to your evaluation statement with the committees that have previously reviewed the WPAF material.

This responsibility becomes very important for committees that evaluate submitted portfolio materials later in the process, like the Department Chair and College Dean. Moreover, it can be done through the Interfolio platform.

To share a document with other Committees through Interfolio:
1) Step 1: Log in to Interfolio
2) Step 2: Stay on the “Case Materials” page, click “Share”, then select “With Committee members”
3) Step 3: Remove your name from the “To” section of the message
4) Step 4: Click “Committee”
5) Step 5: Select the correct committee
   a. Repeat Step #5 for all necessary committees
6) Step 6: Click “Add Members”
   a. Repeat Step #6 for all necessary committees
7) Step 7: Fill in the Subject field
8) Step 8: Fill in the Message field
   a. This message is personal, compose whatever message you feel is necessary
9) Step 9: Scroll down to “Share Files” and click “+Add”
10) Step 10: Select the correct document(s) by clicking the blue + next to the document title
11) Step 11: Click “send”
Step #3

Step #4, click “committee”

Step #5. Select the proper committee(s)

Step #6, click here for each committee selected
Step #7

Step #8

Step #9

Step #10, click the blue + to add document(s) to the message as attachments
Forwarding Case to the Dean by the deadline published in the annual RTP Timetables

As an RTP 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
1) 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:
   a) Search for them on your “Home” page
   b) Search for them under “Cases” using either
      i) The search box
      ii) The filter options

Process:
1) Step 1: Find the case you want to forward
2) Step 2: Click the Faculty member’s name to open the case
3) Step 3: Click the blue “send case” button at the top right-hand corner of the screen
4) Step 4: Click the “Forward To Dean Review” option from the drop-down menu
5) Step 5: After Clicking the “Forward to…” option, keep the “send message” option checked and fill in the required parts of the message
6) Step 6: Click “Continue”
Step 2
Use this to find cases

Step 3
OR use this to find cases

Step 4
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

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

Responsibilities for the Review Step:
1) Login
2) Evaluate the submitted material in each case against the appropriate DPS criteria
3) Compose SEPARATE Evaluation & Recommendation Statements
4) The DPC Chair must upload the DPC’s SEPARATE Evaluation and
   Recommendation Statements to the “Required Items” box on the “Case Details”
   page of every assigned case
5) Informing the Department Chair when the separate Evaluation & Recommendation
   statements are 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 RTP 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 the 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 #4

Sign in through your institution

If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.

California State University-Fullerton

Sign in

Step #5

Login to Interfolio, Inc.
Username
Password

Login

Need help logging in?
First time students and applicants
Create my campus account
Alumni Portal
Alumni FAQ
Evaluating Submitted Material
1) Find the cases assigned to your committee, these will be listed as:
   a) tasks on the Interfolio user Home page

   ![Interfolio Home page with tasks]

   b) Search results on the “Cases” page

   ![Interfolio Cases page with search results]

2) Click on a name to open a case to read the material
   a) Be aware of the due date and RTP Status of each case
b) After opening the case, click “read case” to view materials for evidentiary support for your Evaluation statement.

c) Use the following functions to move through submitted material and to annotate if desired
Uploading the separate DPC Evaluation & Recommendation to the “Required Items” box

FAR has created 2 new templates for Reviewers to use during the RTP Cycle, please use them for ALL Full Performance RTP Reviews in the upcoming academic year:

- **RTP Evaluation Form**
- **RTP Recommendation Form**
- These statements are **REQUIRED** to be **SEPARATE** documents by UPS 210.000 and the “required documents” in Interfolio reflect that

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 mark 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 documentation 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, you WILL NOT BE ABLE TO FORWARD THE CASE

Process
1) Step 1: To upload the SEPARATE Evaluation and Recommendation Statements, Click "+Add"
2) Step 2: Click "Browse to Upload"
3) Step 3: Select your document
   a) Give it a CLEAR and LOGICAL naming convention
4) Step 4: Leave the selected section as "Evaluation Documents"
5) Step 5: Click "+Add"
6) Step 6: Check to make sure the upload was successful
Step #1

Step #2
4) If a mistake was made or you need to make a change to the document that you uploaded
   a) Step 1: Click the pencil
   b) Step 2: Then select the option from the drop-down menu that best suits your needs

5) 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 Chair when Duties are complete

When the DPC’s SEPARATE Evaluation and Recommendation Statements are uploaded into the “Required Document” box, the DPC Chair will need to contact the Department Chair, 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.
Chapter 4: College Dean

Candidate Role:
Responding to the rebuttal period initiated by the Dean, once the Dean’s evaluation/recommendation statement has been shared.

Responsibilities for the Review Step
1) Logging In
2) Evaluating Submitted Material
3) Uploading the Dean’s Evaluation/Recommendation to the “Required Items” box on the “Case Details” page of every assigned case
4) Sharing Copies of the Dean’s Evaluation/Recommendation with Chair and DPC
5) Conducting the Rebuttal Period through Interfolio
6) Sharing Copies of any Rebuttals filed with Chair and DPC
7) Forwarding case to FAR by the deadline published in the Annual RTP Timetables

*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 RTP 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.
Dear committee members,

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,
Ed Collom

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 the 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 #4

Sign in through your institution

If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.

California State University-Fullerton

Sign In

Don't have an account? Use Interfolio.

Sign in with an Interfolio account

Step #4
Evaluating Submitted material

1) Find the cases assigned to your committee, these will be listed as:
   a) tasks on the Interfolio user Home page

![Image of Interfolio user Home page with My Tasks section showing cases]

b) Search results on the “Cases” page

![Image of Interfolio Cases page]

2) Click on a name to open a case to read the material
   a) Be aware of the due date and RTP Status of each case
b) After opening the case, click “read case” to view materials for evidentiary support for your Evaluation statement.

c) Use the following functions to move through submitted material and to annotate if desired.
Uploading the Dean’s Evaluation/Recommendation to the “Required Items” box

FAR has created a new template for Deans to use during the RTP Cycle, please use them for ALL Full Performance RTP Reviews in the upcoming academic year:

- **RTP Dean Evaluation/Recommendation Form**

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 mark 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 documentation 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, you WILL NOT BE ABLE TO FORWARD THE CASE

**Process**

1) Step 1: To upload the Dean’s Evaluation/Recommendation, Click "+Add"
2) Step 2: Click "Browse to Upload"
3) Step 3: Select your document
   a) Give it a CLEAR and LOGICAL naming convention
4) Step 4: Leave the selected section as "Evaluation Documents"
5) Step 5: Click "+Add"
6) Step 6: Check to make sure the upload was successful
7) If a mistake was made or you need to make a change to the document that you uploaded
   a) Step 1: Click the pencil
   b) Step 2: Then select the option from the drop-down menu that best suits your needs

8) 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
Sharing Copies of the Dean’s Evaluation/Recommendation with Chair and DPC

As part of the RTP Process, one of your responsibilities as Dean is to share copies of your Evaluation/Recommendation statement with both the Candidate’s Department Chair and DPC, who reviewed them previously.

Process:

1) Step 1: Log in to Interfolio
2) Step 2: Stay on the “Case Materials” page, click “Share”, then select “With Committee members”
3) Step 3: Remove your name from the “To” section of the message
4) Step 4: Click “Committee”
5) Step 5: Select the correct committee
   a. Repeat Step #5 for all necessary committees
6) Step 6: Click “Add Members”
   a. Repeat Step #6 for all necessary committees
7) Step 7: Fill in the Subject field
8) Step 8: Fill in the Message field
   a. This message is personal, compose whatever message you feel is necessary
9) Step 9: Scroll down to “Share Files” and click “+Add”
10) Step 10: Select the correct document(s) by clicking the blue +
11) Step 11: Click “send”
Step #3

Step #4, click here

Step #5. Select the proper committees

Step #6, click here for each committee
Step #7

Step #8

Step #9, click the blue + to add document(s) to the message as attachments.
Conducting the Rebuttal Period through Interfolio

1) As part of the RTP process, each faculty member has the right to rebut the evaluation produced by the Dean
   a) This decision must be indicated by the faculty member using the FAR RTP Rebuttal form, and that form, along with any rebuttal statements must be uploaded to Interfolio using the process below

2) As Dean is it your responsibility to ensure that each faculty member in your College receives a copy of the appropriate documentation published in the FAR Annual RTP Timetables

3) The Rebuttal Period lasts for 10 CALENDAR DAYS after a copy of the appropriate documentation is provided to the faculty member under review
   a) If the faculty member does not submit a rebuttal within the timeframe given they are NOT allowed to do so through an outside email NOR are extensions to be given.

Sharing the Documentation with the Candidate

1) Once you as the Dean have uploaded your evaluation/recommendation statement it is time to share it with the candidate

2) Message template:

Dear Professor [insert name],

Your rebuttal period for the Dean’s Evaluation/Recommendation Statement has been initiated. Above this message is a button that will allow you to see the document that has been shared with you. You will need to log into Interfolio, open to your most recently
submitted review packet, and within that review, packet click the tab labeled "Shared Committee Files".

You will be able to see and read all the documents shared with you under "Shared Committee Files". Please indicate whether or not you would like to submit a rebuttal using the RTP Rebuttal Form provided by FAR, as your "Response" to the files shared with you. If you wish to submit a rebuttal statement, please follow the instructions for doing so on the rebuttal form.

You have until [insert date] to file a "response" to the files shared with you under "Shared Committee Files". Once this deadline has passed on [insert date], the rebuttal window will be closed. Rebuttal statements NOT filed using this method through Interfolio or after the deadline listed will not be accepted.

Sincerely,

[insert name]

College Dean

Process:
1) Step 1:
   a) Either go to the “Case Materials” page for each case and click “share”
   b) OR Stay on the “Case Details” page for each case,
      i) Click the “case options” button,
      ii) select “email candidate” from the dropdown menu
2) Step 2: Fill in the required Subject and Message portions
   a) The message is completely personal, you can use the template above or create your own
   b) The message must include the following:
      i) What’s being shared
      ii) A link to the FAR RTP Rebuttal form
      iii) The deadline to submit a copy of the rebuttal form and/or rebuttal statement
         (1) 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
3) Step 3: Scroll down to where it says “Share Files” and click “+Add”
4) Step 4: Add the necessary files that need to be shared by clicking the blue + next to the document title
5) Step 5: Enable a file response
6) Step 6: Select a deadline 10 calendar days from when you are sending the email
   a) If the 10th calendar day falls on a weekend, select the Monday after
7) Step 7: Select “rebuttal/meeting response” as the section for the Response to go into
8) Step 8: Click “send”

Step #1, option i
Click here 1st

Click here last

Step #1, option ii
Click here 1st

Click here last

Step #2

Step #3
Step #4, click the blue + to add documents to message as attachments

Step #5

Step #6

Step #7
Sharing Copies of any Rebuttals filed with Chair and DPC

If a rebuttal statement is filed by the candidate, then it is your responsibility as Dean to share a copy of that rebuttal statement with the candidate’s Department Chair and DPC. When a response is submitted by the Candidate, you, the Dean, will receive an email that looks like this:

1) When you get the email
   a. Click on the link to view the file submitted in response
   b. OR Login to Interfolio, open up the case, and click on the document title in the Rebuttal/Meeting Response section

To share a document with other committees through Interfolio

1) Step 1: Log in to Interfolio
2) Step 2: Stay on the “Case Materials” page, click “Share”, then select “With Committee
3) Step 3: Remove your name from the “To” section of the message
4) Step 4: Click “Committee”
5) Step 5: Select the correct committee
   a. Repeat Step #5 for all necessary committees
6) Step 6: Click “Add Members”
   a. Repeat Step #6 for all necessary committees
7) Step 7: Fill in the Subject field
8) Step 8: Fill in the Message field
   a. This message is personal, compose whatever message you feel is necessary
9) Step 9: Scroll down to “Share Files” and click “+Add”
10) Step 10: Select the correct document(s) by clicking the blue +
11) Step 11: Click “send”
**Message to Committee**

**To**

Add Another: User | Committee

<table>
<thead>
<tr>
<th>Search for Or Select a Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>FAR</td>
</tr>
<tr>
<td>Provost</td>
</tr>
<tr>
<td>Sample Dean</td>
</tr>
<tr>
<td>Sample Department Chair</td>
</tr>
<tr>
<td>Sample Department DPC</td>
</tr>
</tbody>
</table>

---

**Step #5. Select the proper committee(s)**

---

**Step #6. Click here**

![Add Members button](Add Members button)

---

**Message to Committee**

**Subject *  **

Message Subject

**Message *  **

Message Subject

---

**Share Files**

Files shared with this message can be viewed by the recipient(s) after logging into Interfolio.
Step #9

Step #10, click the blue + to add document(s) to the list above

Step #11
Forwarding case to FAR by the deadline published in the Annual RTP Timetables

As an RTP 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
1) 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:
   a) Search for them on your “Home” page
   b) Search for them under “Cases” using either
      i) The search box
      ii) The filter options

Process:
1) Step 1: Find the case you want to forward
2) Step 2: Click the Faculty member’s name to open the case
3) Step 3: Click the blue “send case” button at the top right-hand corner of the screen
4) Step 4: Click the “Forward FAR Processing option from the drop-down menu
5) Step 5: After Clicking the “Forward to…” option keep the “send message” option checked and fill in the required parts of the message
6) Step 6: 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

**Process:**
1) Step 1: Use the Filter options to find all cases that are assigned to you
2) Step 2: Check the checkboxes either next to the faculty names or check the check box at the top of the filtered results
   a) All required documents have to be fulfilled before this step can be completed for all cases selected
3) Step 3: Click “Send Forward”

4) Step 4: Make sure that the “send a message” option is checked and fill in the required parts of the message
5) 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
Appendix I: Tips for Annotating in Interfolio

For those of you who like to annotate or make notes on materials you can do so in Interfolio, while in the "read case" mode

PLEASE NOTE: Set the Following defaults on your Computer
- Internet browser: the most up-to-date version of Google Chrome, Firefox, or Safari
- PDF reader: Adobe Acrobat DC or Mac equivalent

After logging in to Interfolio and clicking on the name of a faculty member who has been assigned to you for review, click the "Read Case" button

1) This button will redirect you to the screen below where you can read the faculty member’s submitted documents

a) Within this screen, there are several tools available to help you annotate within documents, search for specific terms within a document, and keep track of everything

When looking for something specific within a doc, use this search box
2) For annotation, there are three icons and corresponding tools to help you annotate within a document submitted with an RTP Portfolio or Lecturer WPAF in the bottom right-hand corner of the Read Case viewing mode.

3) The Note Pad icon allows you to make annotations in 3 different ways.

a) You can input a point with an attached comment which functions a lot like a bookmark or note bubble in Adobe. To initiate the tool make sure to click the word “point”.

i) Then go to the location in the document that you would like to make the point and click. The point will be marked and a text box will appear for you to type your notes in.
b) The second option is to select an area within the document you are working in. To initiate go back down to the notepad icon and click the word area

i) Then go to the area in the document that you would like to circle, click and drag to define the area, then release your mouse. The area will be marked and a text box will appear for you to type your notes in.
c) The third and final option available through the notepad icon is the text option, which allows you to highlight text and a corresponding text box will appear for you to make your note in.

i) Go to the text you want to highlight click and drag your mouse from L to R, then release your mouse. The text will be highlighted
4) Now all annotations made within the interfolio platform, while in the read case mode are automatically saved in the "annotations" pane

5) All of your annotations from a specific document are arranged by document name, date, and time you inputted them, and the text of the annotation itself.

   a) When you click on a specific annotation the document in the read case screen will resize and the annotation highlighted
6) All of your annotations can also be exported to a PDF that you can use and reference later
   a) To Export your annotations click this button

   ![Annotations]
   Click Here to automatically generate a PDF of your annotations

7) From all the examples provided above this is the PDF that was generated

   ![PDF Example]
8) To delete your annotations
   a) Click inside the textbox of the annotation you want to delete, then click the trashcan icon down in the bottom, right-hand corner of the "read case" screen

9) To make your annotations visible or invisible on the document you are working in, click the eye icon in the bottom right-hand corner of the screen

   a) Before clicking the eye
b) After Clicking the eye icon
2.0 Table of Contents for Appendix

1. Section 8.0 Teaching Appendix TOC
   a. Section 8.10 Completed SOQs (Raw Data) for courses taught
      i. 8.11 Spring 2018_SOC 101_Raw data
      ii. 8.12 Spring 2018_SOC 201_Raw data
   b. Section 8.20 Course Materials
      i. 8.21 Syllabus_SOC 101_Spring 2018
      ii. 8.22 Syllabus_SOC 201_Spring 2018
   c. Section 8.30 Other Relevant Material for Teaching Performance
      i. 8.31 Thank you card from student A in SOC 101
      ii. 8.32 SOQ comments for SOC 201_Fall 2018

2. Section 9.0 Scholarly Appendix TOC (Actual publications)
   a. Section 9.10 Publications and Creative Works
      i. 9.11 Paper A for American Journal of Sociology_Nov 2017
      ii. 9.12 Paper B for Sociology Journal of America_Sep 2016
   b. Section 9.20 Evidence of Publications and Creative Works
      i. 9.21 Letter of Acceptance for publication for Paper A
      ii. 9.22 Peer review data from Sociology Journal of America for Paper B
   c. Section 9.30 Accepted Works and Documentation
      i. 9.31 Paper C accepted by SOA for November
      ii. 9.32 Acceptance Letter for Paper C (will be published in November 2018)
   d. Section 9.40 Unpublished works and Ongoing Activities
Appendix II: DPC and Department Chair Evaluation Form

The Department Chair and the Department Personnel Committee are to use this form to prepare their evaluation of the candidate’s Working Personnel Action File. This evaluation shall be based upon approved Departmental Personnel Standards (or UPS 210.002) and provide a written assessment of performance in teaching, scholarship, and service. Each area shall be rated using the categories from the applicable DPS document. This evaluation shall NOT include a recommendation for action. Please pay close attention to the deadlines for these evaluations.

Once the Chair Evaluation is complete and the DPC has completed their Evaluation and Recommendation (separate form), the parties shall exchange these documents. The Chair and the DPC Chair must upload this completed form into the Evaluation Documents section of the candidate’s Interfolio packet (see the following tutorial for step-by-step instructions) and notify the other that it is available. Once the Chair Evaluation, DPC Evaluation, and DPC Recommendation are uploaded to the Evaluation Documents section, the Chair shall share them with the candidate through the “Case Materials” screen and administer the 10 calendar day rebuttal period.

Complete the fields in the table below. DPC member names shall be listed in alphabetical order. Delete any Evaluator Name fields that are not needed. As you begin editing this form, save it using a descriptive filename (“DPC Evaluation of Tuffy Titan.docx”). Once the written assessment has been finalized, enter the date that the evaluation was completed, save the file, and upload it to Interfolio.

<table>
<thead>
<tr>
<th>Department</th>
<th>Candidate Name</th>
<th>Candidate Rank</th>
<th>Candidate Status (PY number or tenured)</th>
<th>Evaluator Name</th>
<th>Evaluator Name</th>
<th>Evaluator Name</th>
<th>Evaluator Name</th>
<th>Evaluator Name</th>
<th>Date Evaluation Completed</th>
</tr>
</thead>
</table>

Written Assessment of Performance:
The Department Chair and the Department Personnel Committee are to use this form to prepare their recommendation based on the evaluation of the candidate’s Working Personnel Action File. This recommendation shall be based upon approved Departmental Personnel Standards (or UPS 210.002) and provide written reasons for the recommendation. Please pay close attention to the deadlines for these recommendations.

Once the DPC has completed their Evaluation (separate form) and Recommendation, the DPC Chair must upload the completed forms into the Evaluation Documents section of the candidate’s Interfolio packet (see the following tutorial for step-by-step instructions). After the Department Chair completes and uploads their Evaluation, they shall share all three documents with the candidate through the "Case Materials" screen and administer the first 10 calendar day rebuttal period. Once the candidate submits the Rebuttal Form (or the 10 days expire), the Department Chair shall prepare and upload their Recommendation using this form. The DPC must be alerted that it is available in Interfolio for their viewing (along with any rebuttals). The Chair shall share their Recommendation with the candidate and administer the second 10-day rebuttal period.

Complete the fields in the table below. Note that the recommendation choices for each individual case are available from the spreadsheet that FAR distributed. DPC member names shall be listed in alphabetical order. Delete any Evaluator Name fields that are not needed. As you begin editing this form, save it using a descriptive filename (“DPC Recommendation of Tuffy Titan.docx”). Once the recommendation has been finalized, enter the date that it was completed, save the file, and upload it to Interfolio.
<table>
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<th>Department</th>
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<tbody>
<tr>
<td>Candidate Name</td>
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<td>Candidate Rank</td>
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<td>Candidate Status (PY number or tenured)</td>
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<td>Recommendation (see FAR’s spreadsheet)</td>
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<td>Date Recommendation Completed</td>
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**Recommendation and Written Reasons:**
Appendix IV: Dean Evaluation/Recommendation Form

The Dean is to use this form to prepare their evaluation/recommendation of the candidate’s Working Personnel Action File. The recommendation shall be based upon approved Departmental Personnel Standards (or UPS 210.002) and provide written reasons for the specific recommendation. Please pay close attention to the deadlines for these evaluations.

Once the Dean Evaluation/Recommendation is finalized, the Dean must upload this completed form into the Evaluation Documents section of the candidate’s Interfolio packet (see the following tutorial for step-by-step instructions), share it with them through the "Case Materials" screen, and administer the 10 calendar day rebuttal period. The Dean must also share their Evaluation/Recommendation with the Department Chair and members of the DPC. Once the candidate submits the Rebuttal Form (or the 10 days expire), please forward the case ASAP to FAR.

Complete the fields in the table below. Note that the recommendation choices for each individual case are available from the spreadsheet that FAR distributed. As you begin editing this form, save it using a descriptive filename ("Dean Evaluation of Tuffy Titan.docx"). Once you have finalized the Evaluation/Recommendation, save the file and upload it to Interfolio.
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<thead>
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<th>Department</th>
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<tbody>
<tr>
<td>Candidate Name</td>
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<td>Candidate Status (PY number or tenured)</td>
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<tr>
<td>Recommendation (see FAR’s spreadsheet)</td>
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<td>Dean Name</td>
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<td>Date Evaluation/Recommendation</td>
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<tr>
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**Evaluation/Recommendation:**