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Department Chair Declares Complete
Candidate Role:
Faculty members scheduled to undergo review within your department will need to perform 2 tasks before their RTP portfolio becomes available to be declared complete
1) Submit all review packet sections within the Interfolio by the deadline specified in the annual RTP Timetables provided by FAR
2) Email a signed copy of their checklist to you in a separate email

Receiving the case:
1) After the faculty member has completed the two tasks above you will be notified by Interfolio via email that a case is ready for your review.
   a) The email will look like this:

   ![Email example]

   b) Click on the Sign-in button to be redirected to Interfolio.

Responsibilities for this Review Step:
1) Log in
2) Find the cases assigned to you as a Reviewer
3) Check the case for Completeness
   a) If material is missing from the Portfolio:
i) “Unlock” the 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) Fill out your portion of the checklist that each Faculty member emailed to you
5) *Upload a copy of the Checklist to each case assigned to you to fulfill the “Required Document” condition for this step
6) Forward the 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) 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 “Review Candidate” and follow the steps in the Process portion
Option #3 - Go Directly to the Interfolio login page and favorite this website in your preferred Internet browser, https://account.interfolio.com/login?logout_message=sso

### Process:

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

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

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

   Enter Search Criteria here

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

   ![Interfolio Home Action Items](image)

   b) **Additional Assigned Items** portion of the Interfolio Home Screen

   ![Interfolio Home Additional Assigned Items](image)

**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.

![RTP Status](image)

4) **Period of Review Summary**
<table>
<thead>
<tr>
<th>Abbreviated Reviews</th>
<th>Interfolio Status</th>
<th>Minimum amount of Required Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>PY3 Probationary Year 3</td>
<td>1 year or 2 semesters worth of material, dated between submission deadline of the faculty member's last full performance review and the submission deadline of the abbreviated review</td>
<td></td>
</tr>
<tr>
<td>PY5 Probationary Year 5</td>
<td>1 year or 2 semesters worth of material, dated between submission deadline of the faculty member's last full performance review and the submission deadline of the abbreviated review</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Full Performance Reviews – ALWAYS Cumulative</th>
<th>Interfolio Status</th>
<th>Minimum amount of Required Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>PY2 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>
<td></td>
</tr>
<tr>
<td>PY3-FR 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>
<td></td>
</tr>
<tr>
<td>PY4 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>
<td></td>
</tr>
<tr>
<td>PY5-FR 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>
<td></td>
</tr>
<tr>
<td>PY6 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>
<td></td>
</tr>
<tr>
<td>Tenured 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>
<td></td>
</tr>
</tbody>
</table>
5) 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
   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
   ![Unlock section](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
Filling out the RTP Portfolio Checklist & Fulfilling the Required Document

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.

Fulfilling the “Required document” portion of this review step

After filling in your name and adding the date to the RTP checklist, the checklist will need to be uploaded to fulfill the required document portion of this review step.

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

5) Process
   a) Step 1: To upload the completed RTP Checklist, Click "+Add"
   b) Step 2: Click "Browse to Upload"
   c) Step 3: Select your document
   d) Step 4: Leave the selected section as "Evaluation Documents"
   e) Step 5: Click "+Add"
   f) Step 6: Check to make sure the upload was successful
g) If a mistake was made or you need to make a change to the document that you uploaded
   i) Step 1: Click the pencil
   ii) Step 2: Then select the option from the drop down menu that best suits your needs

h) 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

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

b) Click on the faculty member's name to open a case, that has been assigned to you
   i) Then click the blue "send case" button at the top right-hand corner of the screen
   ii) Finally click the "Forward To Departmental Review" option from the drop down menu
iii) After Clicking the “Forward to…” option make sure to keep the “send message” option checked and fill in the required parts of the message

iv) Then click “continue”

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

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

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

e) Step 5: Click “Send”
Step #4, make sure this is checked

Fill this in

Edit message if you want

Step #5, click here to complete the forwarding process
Departmental Review
Department Chair

Candidate Role: Responding to the Rebuttal Period notifications 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 and sign SEPARATE Evaluation & Recommendation Statements
4) Fulfilling the Required Document Section with SEPARATE Evaluation and Recommendation Statements
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

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
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, 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](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 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) Open a case assigned to you as a reviewer
   a) You can find these under “action items”, “Additional Assigned Items” or using the Search or Filter options on the cases page
      i) **Action Items**
b) Additional Assigned Items

b) Additional Assigned Items

c) “Case” Screen Options

d) Click on a name to open a case to read the material
   i) Be aware of the due date, RTP status, and Timetable for each case
ii) Click “read case” to view materials for evidentiary support for your Evaluation and Recommendation statements.

e) Use the following functions to move through submitted material and to annotate if desired
Fulfilling the “required document” with Evaluation and Recommendation Statements

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 document must be uploaded through this SPECIFIC DIALOG BOX. Simply adding the document to the internal case section specified in the instructions WILL NOT SATISFY the REQUIREMENT
      i) As a result you WILL NOT BE ABLE TO FORWARD THE CASE

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

Drag & Drop your files anywhere or

Browse To Upload

Step #3

Step #4

Step #5

Add Chair Evaluation

Upload a new file  Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

Department Chair RTP Evaluation_Tuffy Titan

Section *

Evaluation Documents

Add
Cancel
g) If a mistake was made or you need to make a change to the document that you uploaded
   i) Step 1: Click the pencil
   ii) Step 2: Then select the option from the drop down menu that best suits your needs

h) 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 to 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 by 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,

[insert name]

Department Chair
3) Process:
   a) Step 1:
      i) Either go to the “Case Materials” page for each case and click “share”
      ii) OR Stay on the “Case Details” page for each case, click the “case options” button, select “email candidate” from the drop down menu
   b) Step 2: Fill in the required Subject and Message portions
      i) The message is completely personal, you can use the template above or create your own
      ii) The message must include the following:
         (1) What’s being shared
         (2) A link to the FAR RTP Rebuttal form
         (3) The deadline to submit a copy of the rebuttal form and/or rebuttal statement
            (a) **THIS IS A HARD DEADLINE**, once this deadline has passed the window to rebut has closed and emailed copies of the rebuttal statements will not be accepted
      iii) Step 3: Add the necessary files that need to be shared
      iv) Step 4: Enable a file response
      v) Step 5: Select a deadline 10 calendar days from when you are sending the email
         (1) If 10 calendar days out falls on a weekend, select the Monday after
      vi) Step 6: Select “rebuttal/meeting response” as the section for the Response to go into
      vii) Step 7: Click “send”
Step #1, option ii
Click here 1st

Step #2

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

Enable

File Response:

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

Step #5

Jul 16, 2020

Deadline

Step #6

Rebuttal/Meeting Response

Section for Response *

Step #7

Send

Message to Candidate

To

Tuffy Titan (tuffy.fullerton.edu)

Subject *

Rebuttal Period for DSP Evaluation, DSP Recommendation, & Department Chair Evaluation

Message *

Share Files

Files shared with this message can be viewed by the candidate after logging into Interfolio.

Details

Direct email reply:

mpons@fullerton.edu

File Response:  

Enable

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

Step #5

Jul 16, 2020

Deadline

Step #6

Rebuttal/Meeting Response

Section for Response *

Step #7

Send

Message to Candidate

To

Tuffy Titan (tuffy.fullerton.edu)

Subject *

Rebuttal Period for DSP Evaluation, DSP Recommendation, & Department Chair Evaluation

Message *

Share Files

Files shared with this message can be viewed by the candidate after logging into Interfolio.

Details

Direct email reply:

mpons@fullerton.edu

File Response:  

Enable

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

Step #5

Jul 16, 2020

Deadline

Step #6

Rebuttal/Meeting Response

Section for Response *

Step #7

Send

Message to Candidate

To

Tuffy Titan (tuffy.fullerton.edu)

Subject *

Rebuttal Period for DSP Evaluation, DSP Recommendation, & Department Chair Evaluation

Message *

Share Files

Files shared with this message can be viewed by the candidate after logging into Interfolio.
**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

3) Process:

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

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

Step #3, click the blue + to get the document to this list
Informing DPC of any rebuttals filed
When a response is submitted by the Candidate, you, the Chair, 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
2) If a rebuttal statement was filed for either or both of the Stage 1 and Stage 2 rebuttal periods they MUST be Shared with the DPC

To share a document with other committees through Interfolio
1) Step 1: Login 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
6) Step 6: Click “Add Members”
7) Step 7: Fill in Subject field
8) Step 8: Fill in 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 #2, Click Here 1st

Step #2, Click Here 2nd

Step #2, Click Here 3rd

Step #3

Step #4, click here

Step #5. Select the proper committee
Step #6, click here

Step #7

Step #8

Step #9

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

As an RTP Reviewer there are two 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:
   1. Search for them on your home page
   2. OR Search for them under “cases” using either
      1. The search box
      2. The filter options
d) Click on the faculty member’s name to open a case, that has been assigned to you
   i) Then click the blue “send case” button at the top right-hand corner of the screen
   ii) Finally click the “Forward To Dean Review” option from the drop down menu

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

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

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

e) Step 5: Click “Send”
Make sure this is checked

Fill this in

Edit message if you want

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 and sign SEPARATE Evaluation & Recommendation Statements
4) Fulfilling the Required Document Section with SEPARATE Evaluation and Recommendation Statements
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

![Interfolio Login](image)

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

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

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

1) Open a case assigned to you as a reviewer
   a) You can find these under “action items”, “Additional Assigned Items” or using the Search or Filter options on the Cases page
      i) Action Items
c) **“Case” Screen Options**

d) Click on a name to open a case to read the material
   
i) Be aware of the RTP status and Timetable for each case
ii) Click “read case” to view materials for evidentiary support for your Evaluation and Recommendation statements.

e) Use the following functions to move through submitted material and to annotate if desired
Fulfilling the Required Document(s) with a SEPARATE Evaluation & Recommendation

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

5) Look for the number next to the “Case Details” tab in each case, and click “case details”
6) 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.

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

   a) **PLEASE NOTE:** the required document must be uploaded through this SPECIFIC DIALOG BOX. Simply adding the document to the internal case
section specified in the instructions WILL NOT SATISFY the REQUIREMENT
i) As a result you WILL NOT BE ABLE TO FORWARD THE CASE

Process
b) Step 1: To upload the SEPARATE Evaluation and Recommendation Statements, Click "+Add"
c) Step 2: Click "Browse to Upload"
d) Step 3: Select your document
   i) Give it a CLEAR and LOGICAL naming convention
e) Step 4: Leave the selected section as "Evaluation Documents"
f) Step 5: Click "+Add"
g) Step 6: Check to make sure the upload was successful
h) If a mistake was made or you need to make a change to the document that you uploaded
   i) Step 1: Click the pencil
   ii) Step 2: Then select the option from the drop down menu that best suits your needs
   i) PLEASE NOTE: If you remove the document from the requirement or delete it a new document will have to be uploaded BEFORE the case can be forwarded
Notifying the 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.
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) Fulfilling the “Required Document” with and Evaluation/Recommendation statement
   a) Sharing Copies of the Dean’s Evaluation/Recommendation with Chair and DPC
4) Conducting the Rebuttal Period through Interfolio
   a) Sharing Copies of any Rebuttals filed with Chair and DPC
5) Forwarding case to FAR by 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.

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https://my.fullerton.edu/Portal/Dashboard/

4) 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.
5) 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

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

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

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

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

Process:

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

1) Open a case assigned to you as a reviewer
   a) You can find these under “action items”, “Additional Assigned Items” or using the Search or Filter options on the Cases page
      i) Action Items

b) Additional Assigned Items
c) “Case” Screen Options

d) Click on a name to open a case to read the material
   i) Be aware of the RTP status and Timetable for each case

   ii) Click “read case” to view materials for evidentiary support for your Evaluation and Recommendation statements.
e) Use the following functions to move through submitted material and to annotate if desired

Fulfilling the “Required Document” with and Evaluation/Recommendation statement

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 is located and click "view"

Option #1, click here

Option #2, click here

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

b) These instructions will tell you what is expected of you, provide links to useful resources, and list the deadline by which the case must be forwarded to the next review level

c) NOTE: Make sure to click on the "->" next to "Instructions to expand the section and read the available instructions for your review level if it is not already expanded"
3) Just below the instructions box is the "required documents" box where you will upload the required documents for this review step

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

i) As a result you WILL NOT BE ABLE TO FORWARD THE CASE

Process

b) Step 1: To upload the SEPARATE Evaluation and Recommendation Statements, Click "+Add"

c) Step 2: Click "Browse to Upload"

d) Step 3: Select your document

i) Give it a CLEAR and LOGICAL naming convention

e) Step 4: Leave the selected section as "Evaluation Documents"

f) Step 5: Click "+Add"

g) Step 6: Check to make sure the upload was successful
Add Dean Evaluation/Recommendation

- **Step #2**: Drag & Drop your files anywhere or click Browse To Upload.

Add Dean Evaluation/Recommendation

- **Step #3**: Select the Name as Dean Eval & Recommendation_Tuffy Titan.
- **Step #4**: Select the Section as Evaluation Documents.

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

i) **PLEASE NOTE:** If you remove the document from the requirement or delete it a new document will have to be uploaded BEFORE the case can be forwarded
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.

To do this through Interfolio:

1) Step 1: Login 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 Subject field
8) Step 8: Fill in 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 #10, click the blue + to add document(s) to the list above
Conducting the Rebuttal Period through Interfolio

1) As part of the RTP process each faculty member has the right to rebut to either or both the Evaluation and Recommendation 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 by 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:**

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

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

- Step #1, option i
  - Click here 1st
- Step #1, option ii
  - Click here 1st
- Click here last
- Click here 2nd

Step #2

- Message to Candidate
  - To: Tuffy Titan (tang@fullerton.edu)
  - Subject: Rebuttal Period for Dean's Evaluation/Recommendation Initiated
  - Message:
    You have until August 4, 2022, to file a “response” to the files shared with you under “shared Candidate Files.” Once this deadline has passed on August 4, 2022, the rebuttal window will be closed. Rebuttal statements NOT filed using the methods through Interfolio or after the deadline list will not be accepted.
  - Share Files
    Files shared with this message can be viewed by the candidate after logging into Interfolio.
**Step #3**, click the blue + to get documents to this list.

**Step #4**

**Step #5**

**Step #6**
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: Login 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 Subject field
8) Step 8: Fill in 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 #5. Select the proper committee(s)

Step #6, click here

Add Members

Step #7

Step #8
Step #9

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

Step #11
Forwarding case to FAR by 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
   a) After logging in, click on an individual faculty name to open a case that has been assigned to you as a reviewer using the methods described in the earlier section about how to find your assigned cases for evaluating the materials:
      i) Search for them on your “Home” page
      ii) Search for them under “Cases” using either
         (1) The search box
         (2) The filter options
   b) Click on the faculty member's name to open a case, that has been assigned to you
      i) Then click the blue “send case” button at the top right-hand corner of the screen
      ii) Finally click the “Forward To FAR Confirmation” option from the drop down menu
iii) After Clicking the “Forward to…” option make sure to keep the “send message” option checked and fill in the required parts of the message.

iv) Then click “continue”

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

Please NOTE: this method for moving cases forward is very useful if the Interfolio server is slow in opening up individual cases or if the Send Case button is non-responsive.
2) Process:
   a) Step 1: Use the Filter options to find all cases that are assigned to you
   b) Step 2: Check the checkboxes either next to the faculty names or check the check box at the top of the filtered results
      i) All required documents have to be fulfilled before this step can be completed for all cases selected
   c) Step 3: Click “Send Forward”
   
   d) Step 4: Make sure that the “send a message” option is checked and fill in the required parts of the message
   e) Step 5: Click “Send”
Step #4, make sure this is checked

Fill this in

Edit message if you want

Step #5, click here to complete the forwarding process
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 into Interfolio and clicking on a 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 book mark 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.

Again I can take as many notes as I want and there appears to be no character limits.
4) Now all annotations made within the interfolio platform, while in 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

   Click Here to automatically generate a PDF of your annotations

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

   This word is hyperlinked, clicking it will take you back to the document where you made this comment
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 8.6 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_September 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
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:
Appendix III: DPC and Department Chair Recommendation Form

RTP Full Performance Review
Departmental Recommendation Form

2020-2021
FAR
CSUF
FACULTY AFFAIRS AND RECORDS

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.

<p>| Department | |
| Candidate Name | |
| Candidate Rank | |
| Candidate Status (PY number or tenured) | |
| Recommendation (see FAR’s spreadsheet) | |
| Evaluator Name | |
| Evaluator Name | |
| Evaluator Name | |
| Evaluator Name | |</p>
<table>
<thead>
<tr>
<th>Evaluator Name</th>
<th>Date Recommendation Completed</th>
</tr>
</thead>
</table>

**Recommendation and Written Reasons:**
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.

<table>
<thead>
<tr>
<th>Department</th>
<th>Candidate Name</th>
<th>Candidate Rank</th>
<th>Candidate Status (PY number or tenured)</th>
<th>Recommendation (see FAR’s spreadsheet)</th>
<th>Dean Name</th>
<th>Date Evaluation/Recommendation Completed</th>
</tr>
</thead>
</table>

Evaluation/Recommendation: