



CALIFORNIA STATE UNIVERSITY  
**FULLERTON™**

# PTR and Interfolio Workshop

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**FAR**

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FACULTY AFFAIRS AND RECORDS

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# Overview

- COVID-19 Impacts
- Intro to Interfolio API Tool and its impact on evaluations
- PTR Tips
- PTR Review Process
- FAR's Online Resources
- Interfolio Introduction
- Interfolio Demonstration

# COVID-19 Impacts

- ALL PTR portfolios are now required to be submitted through Interfolio
- The Rebuttal Period portion of the PTR cycle will be conducted via Interfolio
- Faculty members can opt out of providing Spring 2020 SOQ & Grade Distribution Data
  - See link for more details,  
<http://www.fullerton.edu/far/covid19/>

# Interfolio API

- What?
  - This is an evaluation tool/plugin recently developed by IT in conjunction with FAR.
- Purpose?
  - To automatically import grade distribution and SOQ data for faculty into their active Interfolio cases
- Why?
  - To take some of the burden of preparing evaluation portfolios off of faculty
- When?
  - The API was developed in the 2020-2021 AY and is run by the IT department when new Interfolio cases are created for new evaluation cycles
- The API is a relatively new tool, which means that it is still possible for errors to occur
  - Responsibilities of Faculty Members undergoing review:
    - Check that all the data from all your classes have been imported, if any is missing you are responsible for downloading and uploading the material to your Interfolio Packet.
    - Change any document names imported by the API if you are dissatisfied with them
    - Rearrange the order of the documents imported by the API to best reflect your DPS criteria or department culture

# PTR Overview

- Process is governed by [UPS 210.020](#)
- Purpose: to encourage and maintain excellent performance in university assignments, amongst tenured faculty
- Submission deadline: **10/3/2022**
- Period of review:
  - From the day after you submitted your last evaluation portfolio (RTP or PTR) to the current submission deadline

# Tips to make the PTR Process easier

- ***Start Early***
  - Due date for PTR portfolios: **October 3<sup>rd</sup>, 2022**
  - Interfolio server traffic is most congested on the submission deadline, and the platform slows down significantly
  - Check your ***fullerton.edu*** inbox regularly, for emails from **FAR or noreply@interfolio.com**
- Become familiar with the Interfolio platform where your materials will need to be submitted
  - All PTR Interfolio cases are open to upload materials
  - FAR's PTR Webpage has several resources available for download
    - Interfolio tutorials are available in the [PTR Candidate Guide](#)
- Start immediately digitizing and downloading required material to be submitted for a PTR

# Assembling the PTR Portfolio

- **FAR Recommendation:** Sort your documents first by category type and then in **REVERSE** chronological order
  - Newest documents on top, oldest on bottom, unless otherwise specified by your department
  - [PTR Interfolio Template](#)
- Use logical and clear naming conventions for your documents
- Required documentation (Section II.J.1-3)
  - A current CV
  - SOQ Statistic and Comment Reports for all classes taught over the period of review
  - A narrative summary (maximum 2 pages) outlining the faculty's significant achievements over the period of review, and goals for the next 5 years
- CSUF Portal Contains access to the Faculty Student Success Dashboard (FSSD)
  - This dashboard is where you can download your SOQ/Grade Distribution Data for your evaluations
  - Tutorials – [How to Log in](#), [Accessing Graded Class lists/SOQs](#)

# Journey of the PTR Portfolio

## Faculty Submission

- Candidate uploads all required material and submits PTR portfolio by the annual deadline
- Including the Interfolio candidate form

## Department Chair Declares complete

- Chair checks submitted portfolio for completeness
- Contacts and works with faculty member under review if anything is missing
- Forwards case to PTRC

## PTRC Review

- PTRC evaluates material and composes an assessment of candidate's performance
- PTRC Chair forwards case to Dean, no rebuttal period

## Dean Review

- Dean evaluates material and composes an assessment of candidate's performance
- Dean provides copies of his or her written assessment and the assessment written by the PTRC to Candidate via Interfolio
- Initiates meeting with candidate

## PTR Meetings

- Dean and Department Chair will conduct a meeting with the candidate based on the preference marked on the Interfolio candidate form
- Meeting will discuss the strengths and weakness of the candidate mentioned in the written assessments provided

## PTR Rebuttal period

- Candidate has 10 calendar days to submit a rebuttal after meeting with Dean and Department Chair has concluded



# NEW Process for PTR Rebuttal Period

- The Rebuttal Period will be conducted entirely through Interfolio
- You will get an email from [noreply@interfolio.com](mailto:noreply@interfolio.com)
  - From this email you will be able to login to Interfolio, to see files that were shared with you by your review committees
- Read the documents shared with you, in the Interfolio platform
- Use the [PTR Rebuttal Form](#) to indicate your decision of whether you are going to submit a rebuttal statement and/or request a meeting with the committee(s)
  - If you do submit a rebuttal statement, include it in the appropriate area of the [PTR Rebuttal Form](#)
  - Upload the completed PTR Rebuttal form in Interfolio as your “response” to the documents shared with you
    - Tutorial: [New Rebuttal Period Process](#)
- All responses are due 10-calendar days after you complete your meeting with your Dean and/or Department Chair
  - This is a **[HARD Deadline](#)**

# FAR Online Resources

- FAR homepage: <http://www.fullerton.edu/far/>
- The FAR website now has a page dedicated solely to resources to aid in the PTR process
  - [FAR PTR Page](#)
  - It has been organized to:
    - Lessen the confusion surrounding the PTR process
    - Keep you, the Faculty informed of upcoming events
    - Provide a clearer display of all pertinent documentation that the FAR office has to offer, to better aid you in the PTR process

# Interfolio Introduction

- Interfolio is an electronic evaluation system utilized by many of the CSU campuses, they are also a 3rd party vendor with whom CSUF has a contract
- As CSUF faculty members, you have access to 2 interfolio products
  - Review, Promotion, and Tenure (we refer to this product generically as “Interfolio”)
    - This is where all Portfolio materials will be uploaded
    - Accessible through the CSUF Portal or <https://account.interfolio.com/login>
  - Dossier
    - This is secure storage system where you can store your materials in preparation for upcoming reviews
    - Documents stored in Dossier **CANNOT** be viewed by your review committees until they are uploaded to an active Interfolio review packet and all sections in that packet are **“SUBMITTED”**
- Relevant Tutorials
  - [How to log in](#)
  - [How to use Dossier](#)

# Interfolio Vocabulary

- **Case** = most recent review packet created for a faculty member, where he or she uploads their Portfolio Materials
  - This is also known as a “**Review Packet**”
- **Review packet section** = a specific category of documents that make up the whole of a “case”

# Interfolio Tips

- For Technical issues, contact the Interfolio Help Desk:
  - Email: [help@interfolio.com](mailto:help@interfolio.com)
  - Phone: (877) 997-8807
- Read the instructions provided in various places in the review packet
- Interfolio Tutorials Available on FAR PTR page, under “Interfolio Tutorials” drop down menu
- Use the most up-to-date Chrome, Firefox, or Safari browser
  - Interfolio will **NOT** load in Internet Explorer (IE) or Microsoft Edge
- Use a clear and logical document naming convention, so that reviewers can determine the content of each document from the name alone

The screenshot shows a dropdown menu titled "Interfolio Tutorials" with a downward arrow. Below the title, it displays a "Submission Deadline: 10/3/2022". A list of tutorial links follows, each with an external link icon: PTR Candidate Guide, Logging Into Interfolio, Locating your Interfolio Review Packet, Adding Material to a Packet: New Users, Adding Material to a Packet: Repeat Users, Using Interfolio's Dossier for Evaluations, Changing Document Order in Interfolio, Submitting your Completed Interfolio Review Packet, and New Rebuttal Period Process. Below this list is a "YouTube Videos" section with a button for "Evaluation Video Tutorials". At the bottom, there is a "Post-Tenure Resources" section with a left-pointing arrow.

# Interfolio Tips Cont'd

- Don't be afraid to click things while in working in Interfolio
  - Any permanent changes to your packet, like submission or deletion of uploaded materials will **ALWAYS** require confirmation
- In sections where you have to upload more than one document, like the ones that require SOQ data, upload documents in small batches
  - This way you can [re-arrange documents](#) in smaller batches rather than one big batch
- Do **NOT** use the highlighting, note, or tag function in Adobe to Edit the PDFs you will be submitting, this will affect formatting and legibility
- ***Word of Caution: do not submit your portfolio without double checking the formatting of ALL your uploaded documents***

# Interfolio Demonstration

- There are three methods to log into Interfolio
  - #1 going through the CSUF portal:  
<https://my.fullerton.edu/Portal/Dashboard/>
  - #2 going directly to the Interfolio Log-in Page (make sure to bookmark as a favorite):  
<https://account.interfolio.com/login>
  - #3 Clicking the “View Case” button in the body of the notification email you received from  
[noreply@interfolio.com](mailto:noreply@interfolio.com)

# Faculty Affairs and Records

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