PTR and Interfolio Workshop

By Mary Pons, M.A.
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/](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 3rd, 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

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| **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
  – 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
  – 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
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
Faculty Affairs and Records

Mark Carrier, Ph.D.
Director (x2778, mcarrier)

Mary Pons (x3705, mpons)
Evaluation Analyst

Kelly Marconi (x8593, kmarcon)
Evaluation Coordinator

Nicole Calucag (x8003, ncalucag)
SOQ Administrative Analyst