

# How to Utilize Interfolio Functions for Reviewers

Thursday, May 23, 2019

1:28 PM

After you have selected a name from your list of assigned cases, your evaluation begins. Interfolio comes pre-populated with several buttons, tools, and functions to both streamline and ease what can be a time-consuming process.

## 1. There are several functionalities available to the reviewer on this screen

California State University-Fullerton > Cases >

### Tuffy Titan

Unit: Sample Department | Template: 2020 - FAR - Sample Department - Part-time Lecturers (FALL) | Status: Lecturer - Annual Review change

Case Materials | Case Details

Search case materials by title

Expand All | Collapse All | Read Case | Download | Share | Settings | Move

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

As a member of a review committee, you can click on all of these

- a. The **"Read Case"** button which allows the reviewer to read the materials submitted by the candidate

Click this button to see what it does

Download

- ii. This is the screen the **"Read Case"** button redirects you to

**\*\*CONTINUE TO NEXT PAGE\*\***

The screenshot shows the Tuffy Titan web application. At the top left, the text "Tuffy Titan" is displayed. In the top right corner, a blue button labeled "Return to Case" is circled in red. Below the header, there are navigation options for "Packet" and "Annotations". A sidebar on the left lists a table of contents with items like "1.0 Titan Table of Contents (Test)", "2.0 TABLE OF CONTENTS OF APPENDIX", etc. The main content area displays a document titled "TUFFY TITAN PORTFOLIO TABLE OF CONTENTS" from California State University Fullerton. The document includes a table with columns for "Portfolio of" and "Sample", listing items such as "Table of Contents (this document)", "Table of Contents of Appendix", and "Approved Department Personnel Standards or, if none, UPS 210.000 (version 3-26-15)".

If you want to get out of this screen click this button

b. The "Case Details" option

This screenshot shows the "Case Details" page. At the top, it says "California State University-Fullerton" with a right-pointing arrow. Below that is the large text "Tuffy Titan". Underneath, it says "Unit" followed by "Sample Department". At the bottom, there are two options: "Case Materials" and "Case Details". The "Case Details" option is circled in red.

- ii. This is the screen the "Case Details" option redirects you to. Here you will have instructions on what to do for a review step, as well as other functions.
  - i. Scroll down to see all options when you are on this screen

California State University-Fullerton > Cases >

# Tuffy Titan

Send Case ▾
Case Options ▾

**Unit**  
 Sample Department

**Template**  
 2019-FAR-Sample Department

**Status**  
● Probationary Year 4 [change](#)

Case Materials Case Details

To get out of this screen, click "Case Materials"

**Reviewing as**  
 Sample Department Chair

▼ **Instructions**

When declaring the portfolio complete, please ensure that the candidate has uploaded all the requisite SOQ data, grade distributions, publications, etc. in the proper places on the Interfolio case. As a reminder, the candidate has to submit material dating from his or her hire date to the present. Once you are satisfied that the portfolio is complete and you have signed the **Hard Copy of the Portfolio Checklist**, please move the case immediately to the next review step in Interfolio.

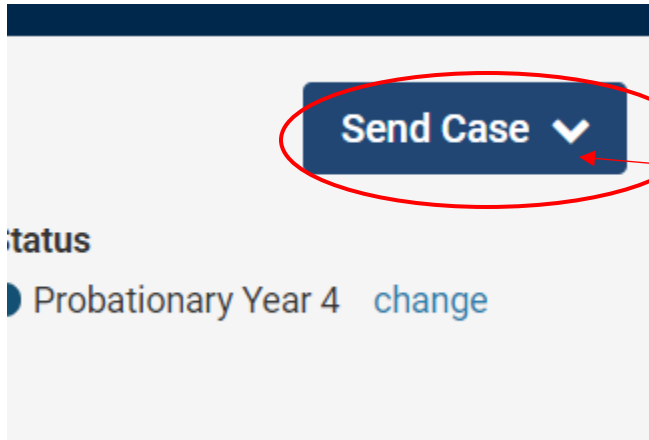
*The Due date listed on your Interfolio review step is the Deadline by which THIS case must be moved to the next review step.*

▼ **Committee Members (1)** Email Edit

| Name      | Email               | Role                 |
|-----------|---------------------|----------------------|
| Mary Pons | mpons@fullerton.edu | <span>Manager</span> |

**Voting Results** [Add New Votes](#)

c. The "Send Case" Button

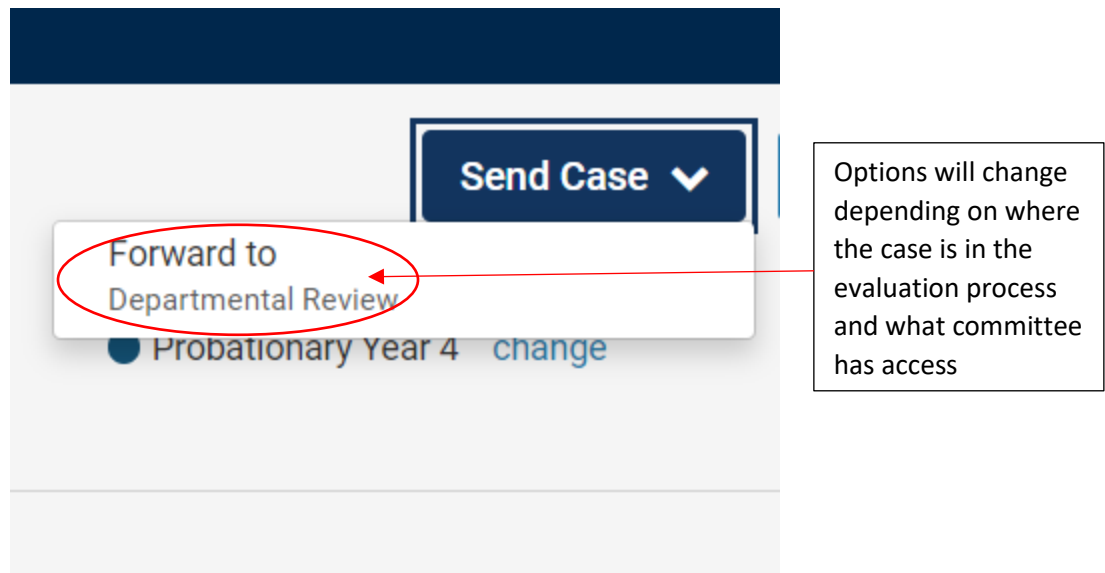


Click this button to see your options for moving cases along in the cycle process

i. status

● Probationary Year 4 [change](#)

ii. These are the options under "Send Case"

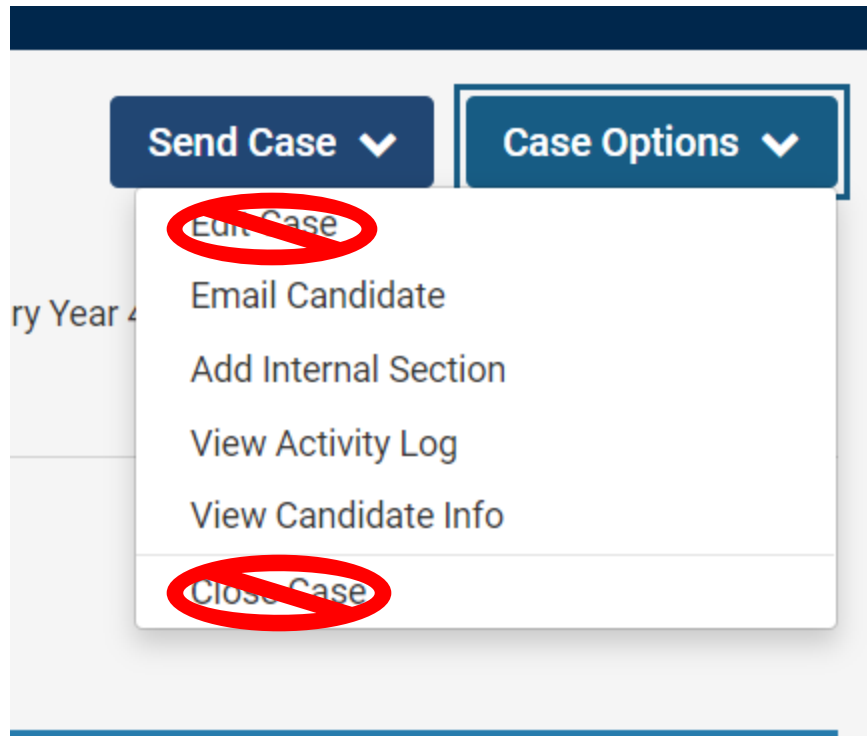


- a. These options will be different for every review level but this is **1** of the methods that can be used to send cases to the next review level, or backward to a previous review level
  - i. However this method can only be used for one case at a time

d. The "**Case Options**" button



- ii. These are the options listed under the "case options" button



2. Please don't click "Close case" or "Edit case"

3. **Internal sections** of the submitted Interfolio packet are sections that only Review Committee Members can see
- a. Any, all, or none of these will be populated with documents by FAR, but Reviewers should be able to add documents if needed to any of these sections

**Internal Sections**

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

>

Previous Evaluations (If Needed)

Edit

Add File

Click Here to expand and read directions

**Candidate Packet**

4. In the sections containing the portfolio materials, you can click on the arrow next to the section name to expand the list of materials contained in that section
- a. Each item or document title in that section list should be hyperlinked and by clicking on it you will be redirected to the same screen that you get to by clicking the "**Read Case**" button
    - i. Un-expanded Review Packet section

## Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

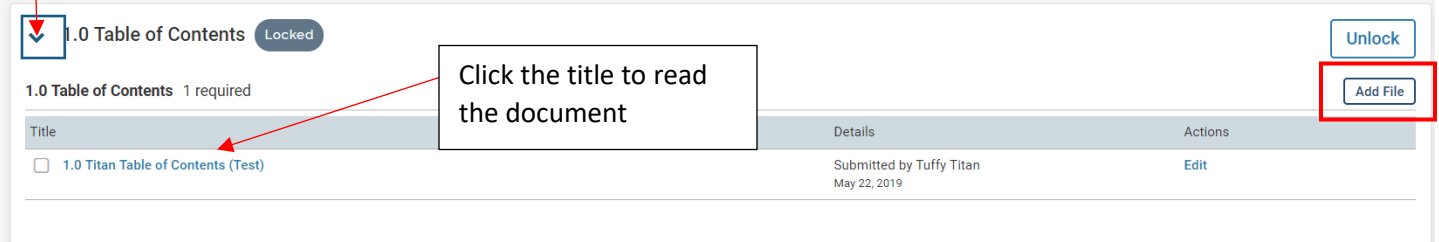


1. The “**Unlock**” feature may only be used during the “declaring the portfolio complete review stage” to allow faculty to add missing material. Once the portfolio is declared complete, **DO NOT** use this function

### iii. Expanded Review Packet Section

## Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.



1. As the reviewer you will be able to add files to sections of your assigned Faculty portfolios by clicking the “**Add File**” button
  - a. If you do so, the details section will list that it was added by you, the reviewer, rather than the candidate, and when the document was uploaded

- v. Screen redirect as a result of clicking the Hyperlinked document title or section list item



1. As you can see, this is the exact same screen you are redirected to when you click the “**read case**” button on the Case Materials page for each Portfolio
  - a. All functionalities on this screen remain the same

**\*\*END OF TUTORIAL \*\***