

Faculty of Arts and Sciences Unit Administrator Guide to Interfolio Review, Promotion, and Tenure (RPT)

- Additional information and product help can be found here:
 - <https://facultyadmin.yale.edu/academic-career-events/reappointments-and-promotions>
 - https://product-help.interfolio.com/en_US/review-promotion-tenure
- Unit Administrators are encouraged to complete the Interfolio's E-Learning course for RPT here:
 - <https://rise.articulate.com/share/Zv9oVNyzU89LcN9je0Uo44JcriWpZ5JQ#/>

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About Interfolio

How do I access my Interfolio account?

1. You may login at <https://account.interfolio.com/login>.

Sign In

Sign in with email

Email *

Password *

Sign In

[Forgot your password?](#)

Other Sign In Options

Sign in with Partner Institution



Sign in with Google

2. Select “Sign in with Partner Institution” as shown above, and search for Yale University as shown below.

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.

Yale University

Sign In

[Sign in with an Interfolio account >](#)

3. Select Yale University from the drop-down list.
4. You will be taken to “Central Authentication Service (CAS) Login” to enter your Yale credentials and then you will be immediately directed back to Interfolio.

Overview of user roles in Interfolio

There are several user role types in Interfolio that have different levels of access to materials and actions in the system.

1. **Institutional Administrators:** administrators with University level access in the Interfolio system. These administrators have access to all users and groups, templates, and cases across all units.
2. **Unit Administrators*:** users with administrator permission are able to access documents, email candidates and committees, move cases forward or backward, create templates, forms, and can create cases for the units they have access to.
* This is the most common access level for staff working on search and review, promotion, and tenure matters. Faculty can never be made Unit Administrators.
3. **Committee Managers:** these users can view the case as committee members and can also move cases backward or forward in the workflow. They can email the candidate and committee members from within Interfolio. In order to make a user a Committee Manager, a Unit Administrator must manually select them to serve this role (see section on creating and managing committees).
4. **Committee Members*:** users must be added to a committee to view a candidate's packet and download documents on the cases that they have access to.
* The faculty members in your department will always be committee members.

Templates

Templates for various reviews have been created at the divisional level by the FAS Dean's Office to reflect the requirements for each case type. Templates should not be edited or duplicated by academic unit administrators.

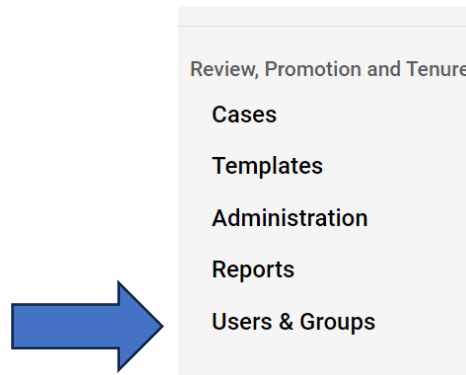
When creating a case, in order to view the full list of cases, you should always leave the case setting type empty.

Managing committees

Refer to the expanded [guide on managing standing committees](#). Standing faculty committees must be updated regularly (in January and July).

Ladder (tenured or tenure track) faculty at Yale are automatically added to the Interfolio system. Instructional faculty must be added manually and occasionally, you will need to add external candidates who are being considered for hire.

1. To add a user you will navigate to the “Users and Groups” tab on the left-hand navigation bar as shown below.



2. Select “Add User” in the upper right as shown below.

If you opt to add a new user, you must ensure that you:

1. Provide first and last name
2. Enter a valid email address
3. Select the appropriate User Type (Internal or External)
 - a. Internal: Requires a User ID
 - b. External: Leave the User ID blank (e.g., external candidates for RPT cases)
 - c. User ID: This is the Employee ID number obtained from Workday

NOTE: the “If checked, this user will need to sign on using their institutional credentials” and “Send the user a welcome message” boxes should be left empty for external candidates.

It is **imperative** that you use the correct format for User ID (Yale Employee ID) when adding new users. If you are uncertain what the Yale employee number is, **stop** and reach out for assistance to faculty.admin@yale.edu before adding a new user in Interfolio.

If you add a user and notice that the format doesn’t match or there was a typo, please call Interfolio’s Help team right away at (877) 997-8807 AND contact faculty.admin@yale.edu. This will be the only way to update the User ID if entered inaccurately.

Yale University > Admin >

Users, Committees & Units

Users Committees Units

Search by name, email or unit

Q Search

Download User list

+ Add User



Add User

First Name *

Last Name *

Email *

User Type *

User ID *

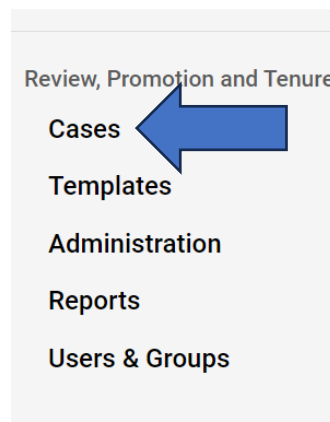
☒ If checked, this user will need to sign on using their institutional credentials.
☐ Send new user a welcome message

SAVE
CANCEL

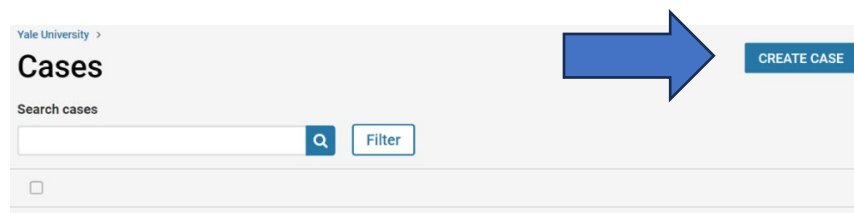
Creating and managing cases

Unit Administrators can create cases for individual faculty members, or multiple cases at once.

Creating a case



1. To create a case, you will navigate to the “Cases” tab on the left-hand navigation bar as shown above. Select “Create Case” in the upper right as shown below.



2. Search for the Candidate’s name, for internal candidates select “Yes, the candidate will be involved during the case”, select the Unit, and click “Confirm”. External candidates will need to be added to Interfolio prior to appearing in this search box and you should select “No” for “Will the candidate be involved in this evaluation”.

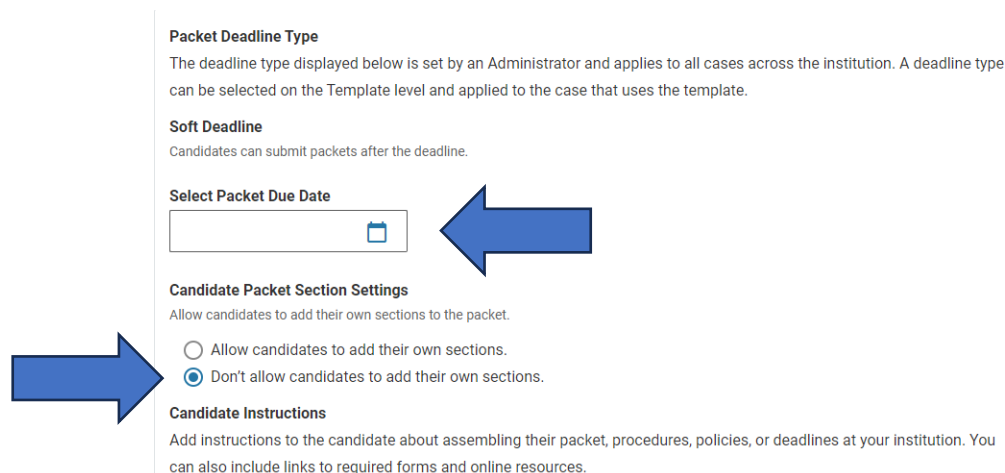
Add New Case

Search for a Candidate *

Selected Candidate *

The candidate information will display here once they are selected.

3. Next, select the appropriate template for the case type. In order to view the full list of case templates, you should always use the case setting type empty. Click “Save and Continue”. For internal candidates, at this step you can select a Packet Due Date (the final materials deadline from the Materials Request Letter) and add the relevant sections of the Materials Request Letter to the Candidate Instructions box (adding this deadline is mandatory for internal candidates). For external candidates, you may skip these sections. Candidates should never be allowed to add their own sections.



Packet Deadline Type
The deadline type displayed below is set by an Administrator and applies to all cases across the institution. A deadline type can be selected on the Template level and applied to the case that uses the template.

Soft Deadline
Candidates can submit packets after the deadline.

Select Packet Due Date

Candidate Packet Section Settings
Allow candidates to add their own sections to the packet.

☐ Allow candidates to add their own sections.
☒ Don't allow candidates to add their own sections.

Candidate Instructions
Add instructions to the candidate about assembling their packet, procedures, policies, or deadlines at your institution. You can also include links to required forms and online resources.

4. Click “Continue” through the remaining sections.

Replacing placeholder committees

1. After creating a case, you must edit the case to replace all placeholder committees in the case steps.
2. To edit the case, navigate to the case and select “Edit case” from the “Case options” dropdown on the upper right.

Yale University > Cases >

Handsome Dan


Unit: Humanities

Template: Associate Professor with Tenure - AOPT (Humanities Division)

Case Materials | Case Details

Send Case ▾ | Case Options ▾

- Edit Case
- Email Candidate
- Add Internal Section
- View Activity Log
- Close Case




3. Navigate to case review steps and select “edit” on the right side.

Case Review Steps

1. Dept Chair and Chair's Assistant

2. Departmental Review Committee (currently on this step)

Edit



4. Replace each committee with the word “PLACEHOLDER” in the title by selecting “edit” on the particular step.

Case Review Steps

+ Add Step | Additional Options ▾

1 Dept Chair and Chair's Assistant

Academic Level: Level 1 | Level 2 | Level 3

(PLACEHOLDER) REPLACE with your proper chair and chair assistant committee - ladder (2)

Includes Instructions | No Required Documents | No Required Forms

Edit | Delete

2 Departmental Review Committee (Current Step)


Academic Level: Level 1 | Level 2 | Level 3

(PLACEHOLDER) REPLACE with your proper ad-hoc Departmental Review Committee - ladder (2)

Includes Instructions | No Required Documents | No Required Forms

(PLACEHOLDER) REPLACE with your proper chair and chair assistant committee - ladder (2)

Includes Instructions | No Required Documents | No Required Forms



5. Then click “options” and replace committee. Select the appropriate standing committee for the step.

Reviewers + Add Committee

▼ (PLACEHOLDER) REPLACE with your proper chair and chair assistant committee - ladder
Standing Committee (2)

Manage Members Instructions Required Documents Required Forms Settings

2 Members

AB	Audrey Bribiescas audrey.bribiescas@yale.edu	☆	⊗
SL	Sarah Logan sarah.e.logan@yale.edu	☆	⊗

Add Members

Options ▼

- Edit Name
- Replace Committee

- If a standing committee does not exist for the particular step (commonly the department review committee), you must replace the committee with an ad hoc committee. To do so, select an “ad hoc committee” and name the committee with an appropriate name.

Replace Committee

(PLACEHOLDER) REPLACE with your proper chair and chair assistant committee - ladder

Who is reviewing the case at this step? *

- ☐ a Standing Committee (created at the unit level in Users & Groups and can be reused for cases in that unit.)
- ☒ an Ad Hoc Committee (created on a per case basis; an admin will need to add members to this committee.)
- ☐ an Individual User (can review the case, but will not be able to collaborate with others.)

Select Ad Hoc Committee *

- ☒ Create New Ad Hoc Committee
- ☐ Existing Ad Hoc Committee

REPLACE COMMITTEE CANCEL

- Make sure to populate your ad hoc committee with the appropriate members after creation by selecting “add members”.

Reviewers + Add Committee

▼ Handsome Dan Department Review Committee
Ad Hoc Committee (0)

Manage Members Instructions Required Documents Required Forms Settings

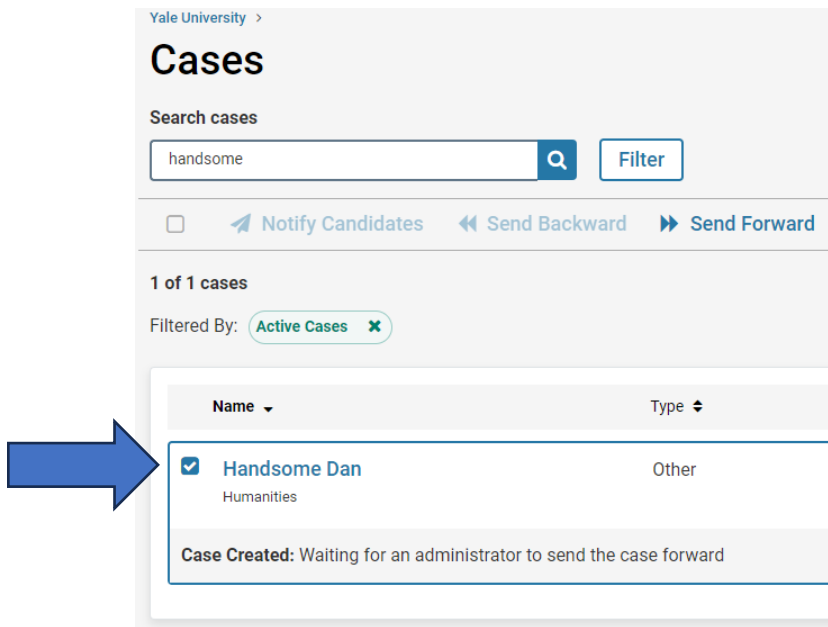
No Members

Add Members

ONLY committees with the word “placeholder” in the name should be replaced. Do not replace committees without this word in the name.

Notifying candidates

- If you chose not to notify candidates when creating their case, you can send the notification email at a later date.
- Select the “Cases” tab on the left-hand navigation bar under the “Review, Promotion and Tenure” heading.
- Check the box next to individual candidate.



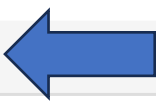
4. Select “Notify Candidates”.



5. At this step, you can include a personal message. Otherwise click “Send”, and the candidate will receive a notification email.

Viewing the status of a case

1. Once you have created cases, you can view which step they are at. Click the “Cases” tab on the left-hand navigation bar to see the full list of cases in your unit. Your list of cases will show which step they are at in the review process on this page.

Name ▼	Type ▼
<input type="checkbox"/> Handsome Dan Humanities	Other
Step 1 of 8: Dept Chair and Chair's Assistant 	

Case movement

1. During the review process, cases will need to be moved forward (and occasionally backwards), you can move your cases by selecting “send case” at the top right side of the case’s page.

Yale University > Cases >

Handsome Dan

Unit
Humanities


Template
Associate Professor with
(Humanities Division)

Case Materials Case Details

Send Case ▼ **Case Options ▼**

Forward to
Eligible Dept. Faculty with equal or greater
rank committee

Backwards to
Dept Chair and Chair's Assistant



2. When moving the case, you will have the option to send a message to the group receiving access.

Uploading materials to a candidate’s packet

1. If a unit administrator needs to upload materials for a candidate’s packet, they can do so by opening the individual case and selecting “Add File” under the “Candidate Documents” section.

Candidate Packet


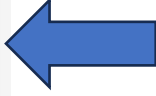
Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

▼ **Candidate Documents** **Unlocked**

Current CV 1 required

No files have been submitted.

Lock **Add File**

2. You can then choose whether to “Lock” the Candidate Documents. Until the deadline entered during case creation, while the Candidate Documents are “Unlocked”, the candidate can edit, add, or delete items. Once the Candidate Documents are “Locked”, the candidate cannot edit, add, or delete files but can still view them.
3. Once all required files are uploaded to the Candidate Documents, the unit administrator can send the case forward to the next review step. Select “Send Case” and “Forward to” the next step.

Yale University > Cases >

Handsome Dan

Unit
Humanities

Template
Associate Professor with Tenure - AOP (Humanities Division)

Forward to
Dept Chair and Chair's Assistant

Select Status

Send Case

Sending Referee Instruction Letters (RILs)

Once a candidate has provided their final materials and you have reviewed them to ensure that they meet the requirements outlined on our website, you will need to send the Referee Instruction Letters to the referees.

1. To send referee instruction letters, you will navigate to the “External Evaluations” section near the bottom of the case and select “Request Evaluation” in the upper right as shown below.

External Evaluations

Materials

No files have been added to this section.

Request Evaluation Add File

2. You can then enter one or more referees (for referees receiving the same version of the RIL) and paste the referee instructions letter into the “Message to Evaluator” area. It is important to note that when a referee needs a different version of the instruction letter (for example when a referee is also a comparator), you will need to repeat this process for each unique version.

Request External Evaluation

External Evaluator Information

First Name *	Last Name *	Email Address *
Handsome	Dan	noreply@yale.edu
Heidi	Police Dog	noreply@yale.edu

Add Another Evaluator

Message to Evaluator

Use this message to request an evaluation of the candidate. Your request can include a personal message to the evaluator and documents to aid the evaluator in their review. Once completed, evaluators submit their reviews through Interfolio's secure delivery system.

From Name
Yale University

Reply-to
sarah.e.logan@yale.edu

Subject
Yale University request for evaluation

Message

3. If messaging more than one referee at once, you will have the option to personalize the message by following the instructions at the bottom of the “message to evaluator” section. Please note that these instructions only appear once the evaluator information has been entered for at least two referees.

Help with Messaging

If you are requesting evaluations from more than one person, use the variables below to automatically fill in the first and last name of each evaluator receiving the message. (e.g. Dear Professor %EV_Last%.)

Evaluator First Name = %EV_First%

Evaluator Last Name = %EV_Last%

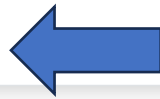
- Once you have entered the referee(s) and instructions, you will move to the files section of the page and attach the candidate files to the message (CV; teaching, research, service statements, scholarship, any additional materials provided by the candidate).

Files

Files added here can be downloaded by the recipient when they accept the invitation to provide an evaluation.

No files selected

[+ Add Files](#)



- After attaching the files, you should set a deadline (matching the deadline provided in the instruction letter). “No” should be selected for the question regarding allowing the evaluator to submit additional files and access should be set to “Administrators & Entire Committee”.

Response Settings

Deadline

The recipient will not be able to submit an evaluation after the deadline date.

Mmm d, yyyy

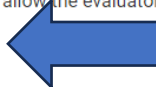


Can the evaluator submit additional files? *

Indicate whether or not you want to allow the evaluator to submit additional supporting materials, such as a CV, along with the requested file.

☐ Yes, allow the evaluator to submit additional files.

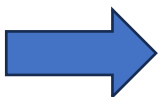
☒ No



Access *

Choose who has access to this document.

Administrators & Entire Committee



Send Request

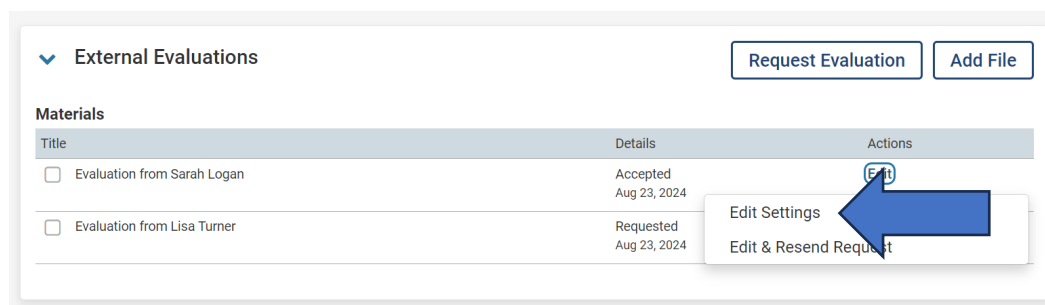
Cancel

Adding referee letters to a case

Referees should upload their letters directly into Interfolio but occasionally they will email the letter directly to the department. In those cases, the letter should be added to the case file by the unit administrator.

- To add a confidential evaluation letter, you will navigate to the “External Evaluations” section near the

bottom of the case and select “edit” and then “edit settings” on the right side of the evaluator’s name as shown below.



2. Scroll to the bottom of the page to the section titled “Confidential Evaluation” and select “add file”. This is the **only** way a confidential evaluation should be added to a case on behalf of a referee.

