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#/

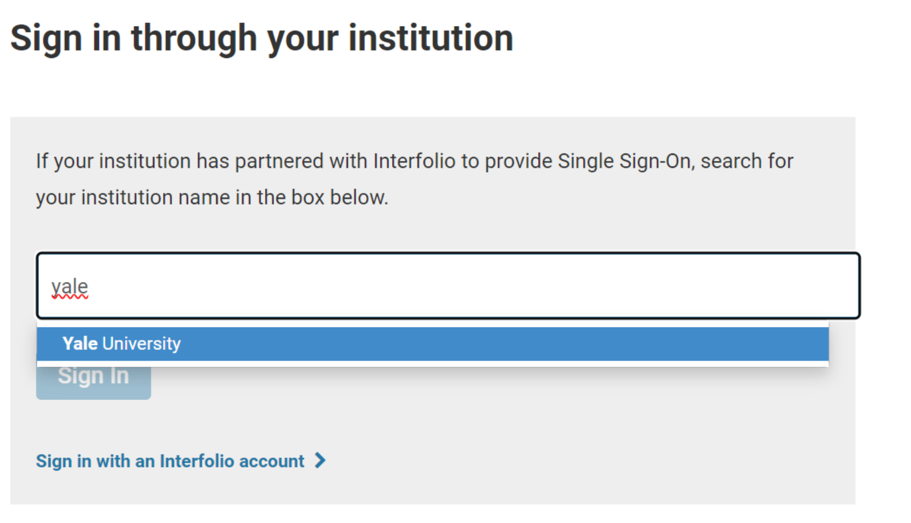
In this document:

About Interfolio

How do I access my Interfolio account?

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

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



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.

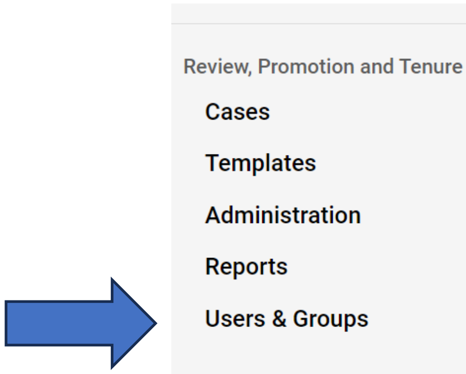
When creating a case, in order to view the full list of cases, you should always leave the case setting type empty.

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.



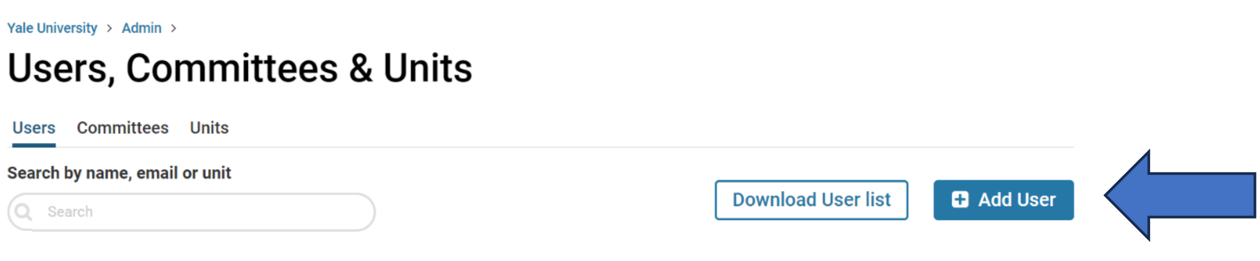
2. Select "Add User" in the upper right as shown below.

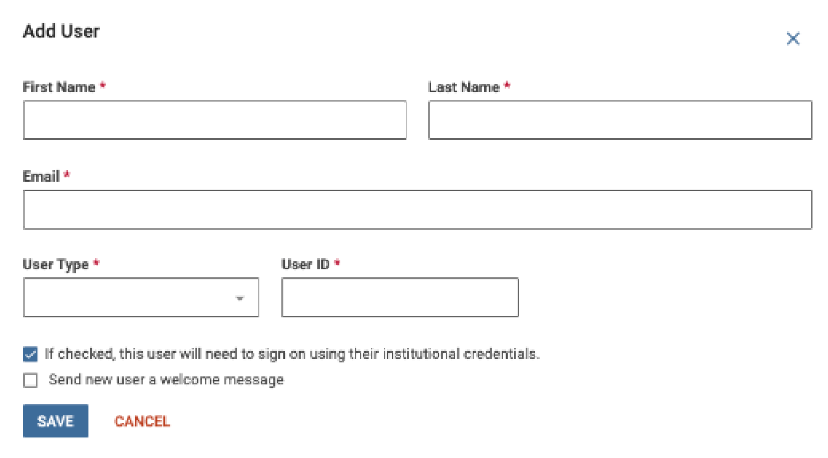
   If you opt to add a new user, you must ensure that you:
   1. Provide first and last name
   2. Enter a valid email address
   3. Select the appropriate User Type (Internal or External)
      a. Internal: Requires a User ID
      b. External: Leave the User ID blank (e.g., external candidates for RPT 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.

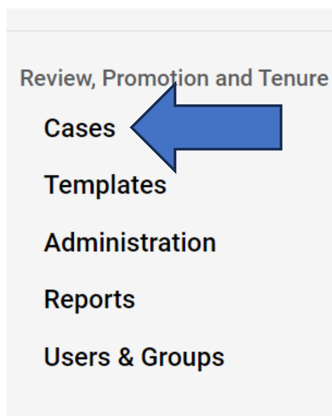




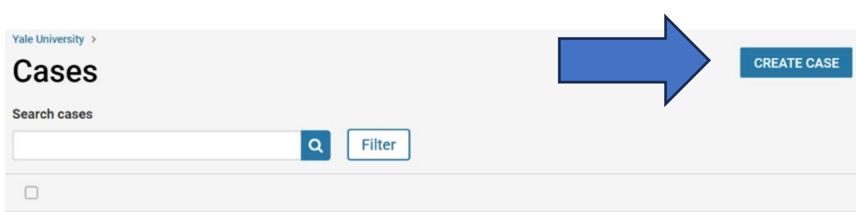
Creating and managing cases

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

Creating a case

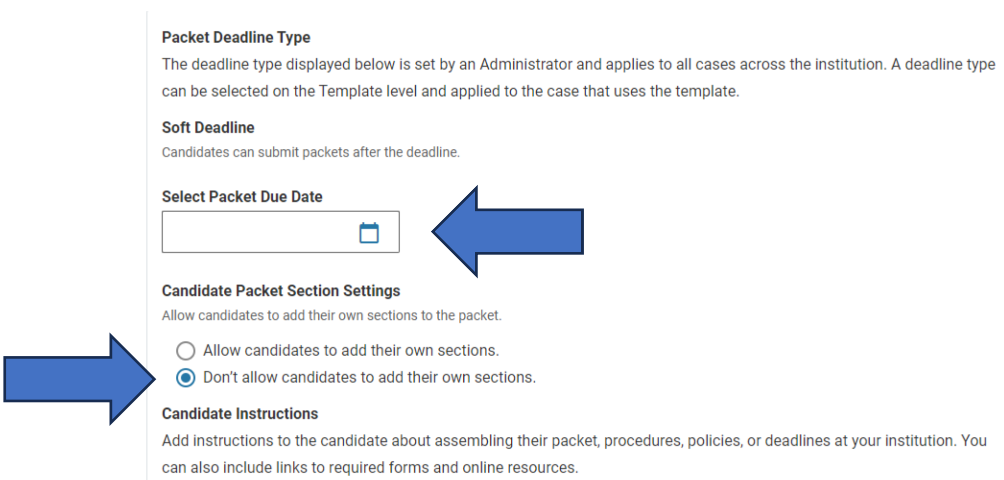


1. To create a case, you will navigate to the "Cases" tab on the left-hand navigation bar as shown above. Select "Create Case" in the upper right as shown below.



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".

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.

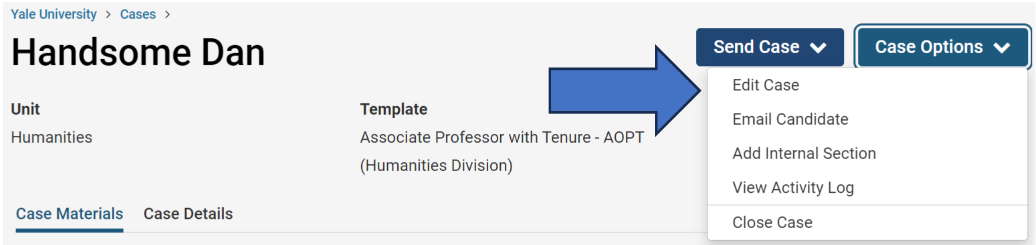


4. Click “Continue” through the remaining sections.

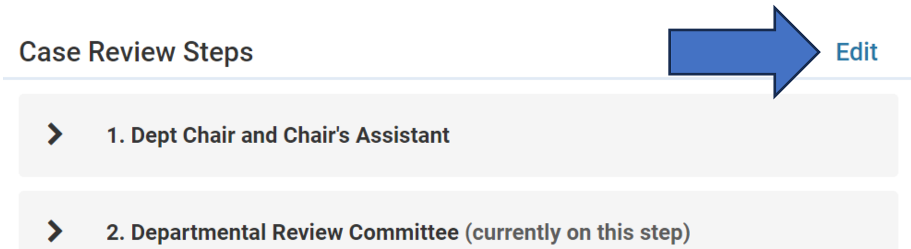
Replacing placeholder committees

1. After creating a case, you must edit the case to replace all placeholder committees in the case steps.

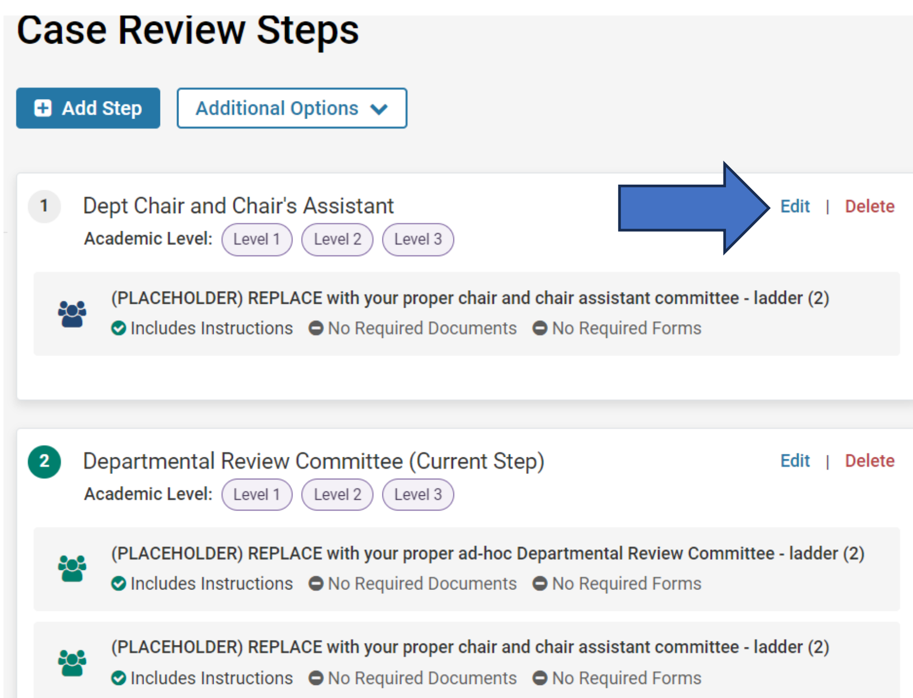
2. To edit the case, navigate to the case and select “Edit case” from the “Case options” dropdown on the upper right.



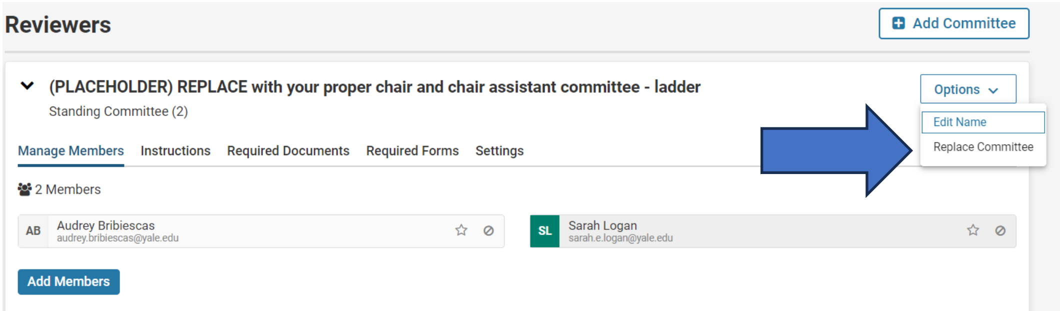
3. Navigate to case review steps and select "edit" on the right side.



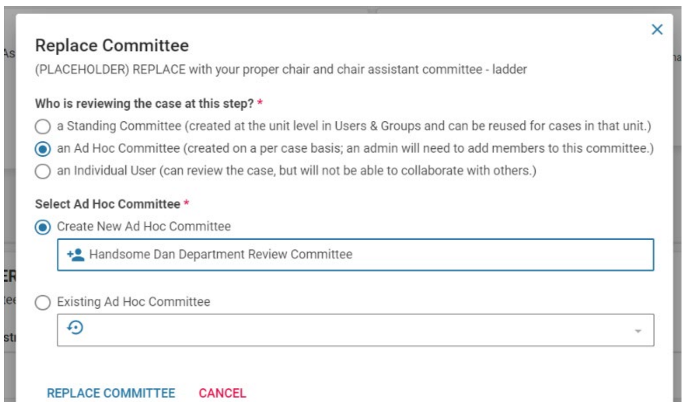
4. Replace each committee with the word "PLACEHOLDER" in the title by selecting "edit" on the particular step.



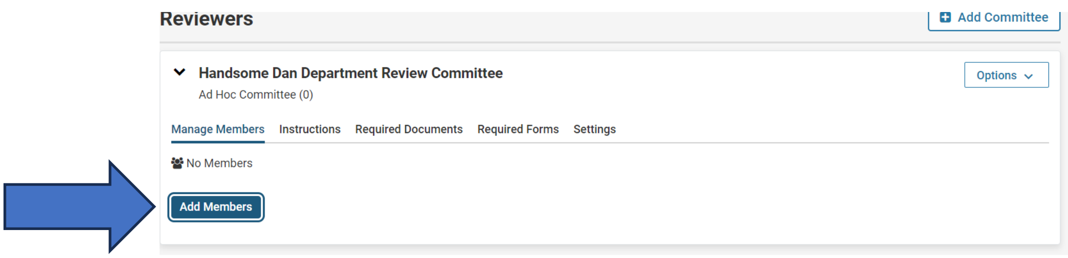
5. Then click "options" and replace committee. Select the appropriate standing committee for the step.



6. 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.



7. Make sure to populate your ad hoc committee with the appropriate members after creation by selecting "add members".



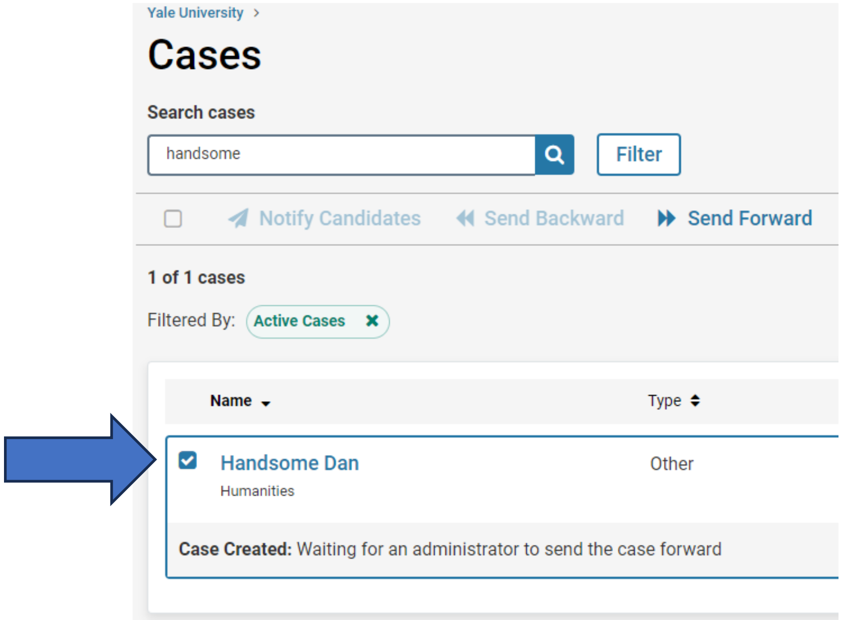
ONLY committees with the word "placeholder" in the name should be replaced. Do not replace committees without this word in the name.

Notifying candidates

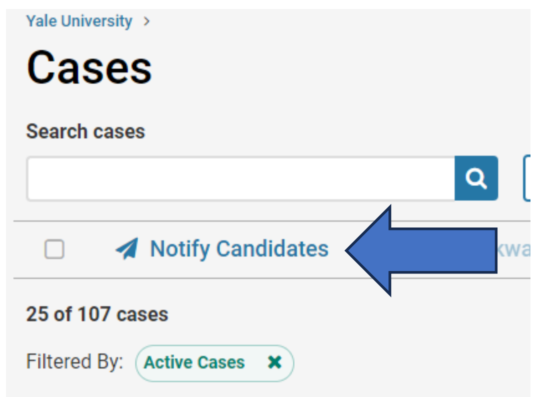
1. If you chose not to notify candidates when creating their case, you can send the notification email at a later date.

2. Select the "Cases" tab on the left-hand navigation bar under the "Review, Promotion and Tenure" heading.

3. Check the box next to individual candidate.



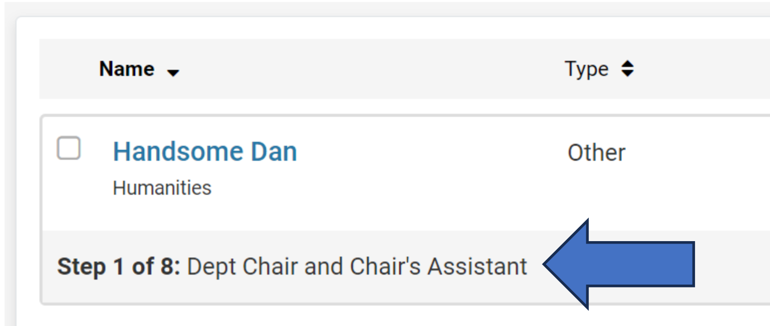
4. Select "Notify Candidates".



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

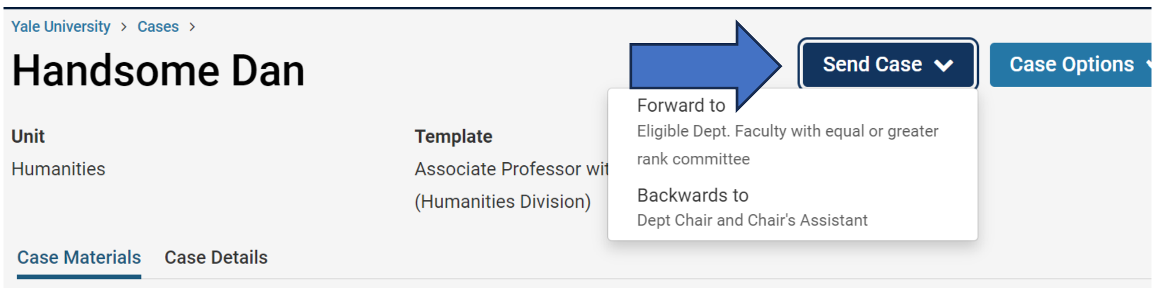
Viewing the status of a case

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.



Case movement

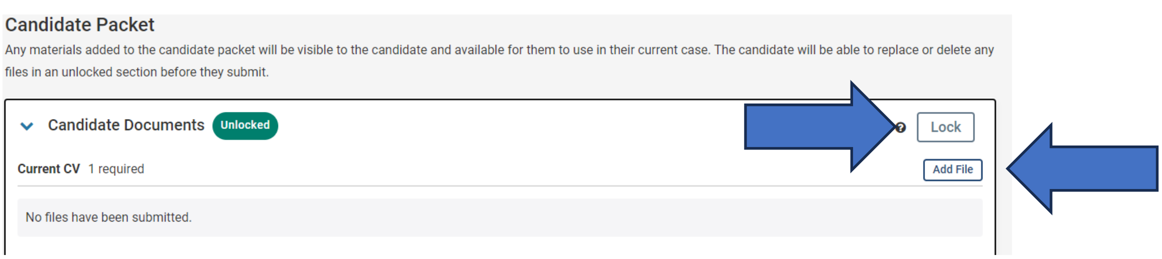
1. During the review process, cases will need to be moved forward (and occasionally backwards), you can move your cases by selecting “send case” at the top right side of the case’s page.



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

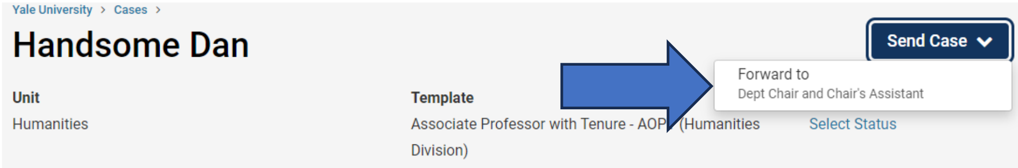
Uploading materials to a candidate’s packet

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.



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.

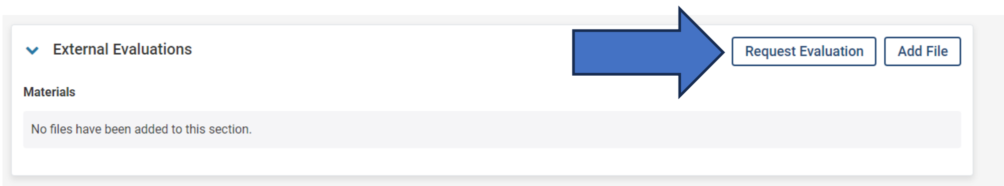
3. Once all required files are uploaded to the Candidate Documents, the unit administrator can send the case forward to the next review step. Select “Send Case” and “Forward to” the next step.



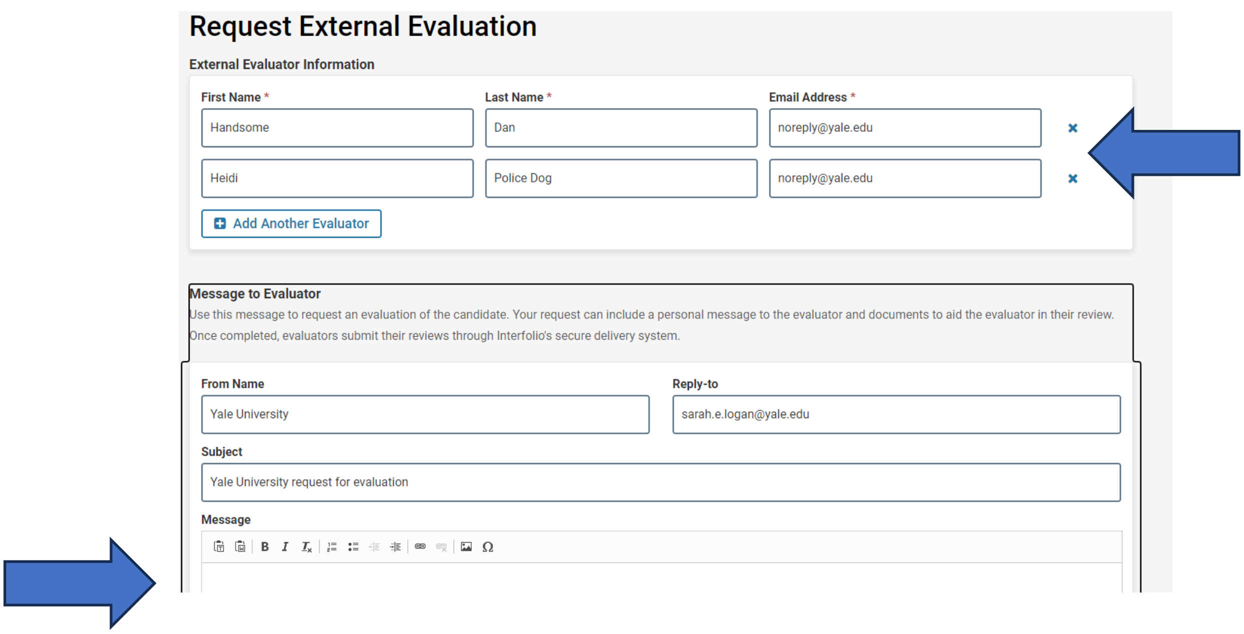
Sending Referee Instruction Letters (RILs)

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.

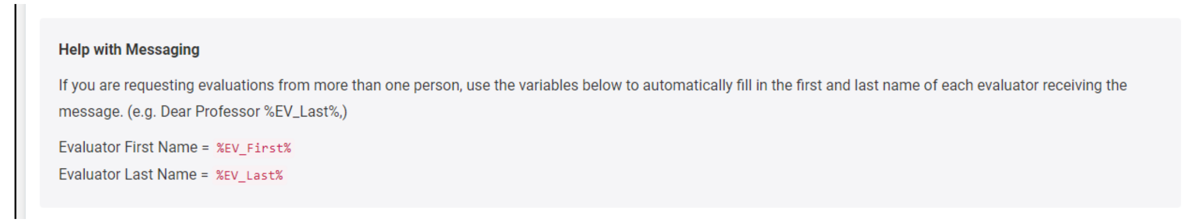
1. To send referee instruction letters, you will navigate to the "External Evaluations" section near the bottom of the case and select "Request Evaluation" in the upper right as shown below.



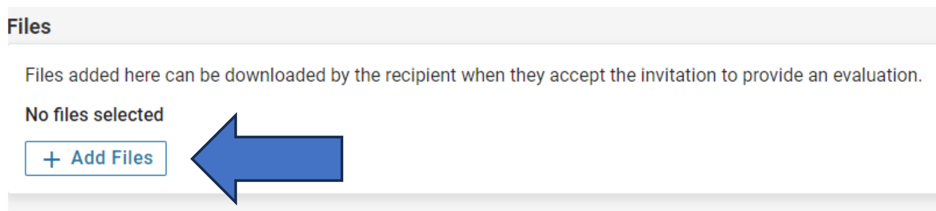
2. You can then enter one or more referees (for referees receiving the same version of the RIL) and paste the referee instructions letter into the "Message to Evaluator" area. It is important to note that when a referee needs a different version of the instruction letter (for example when a referee is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



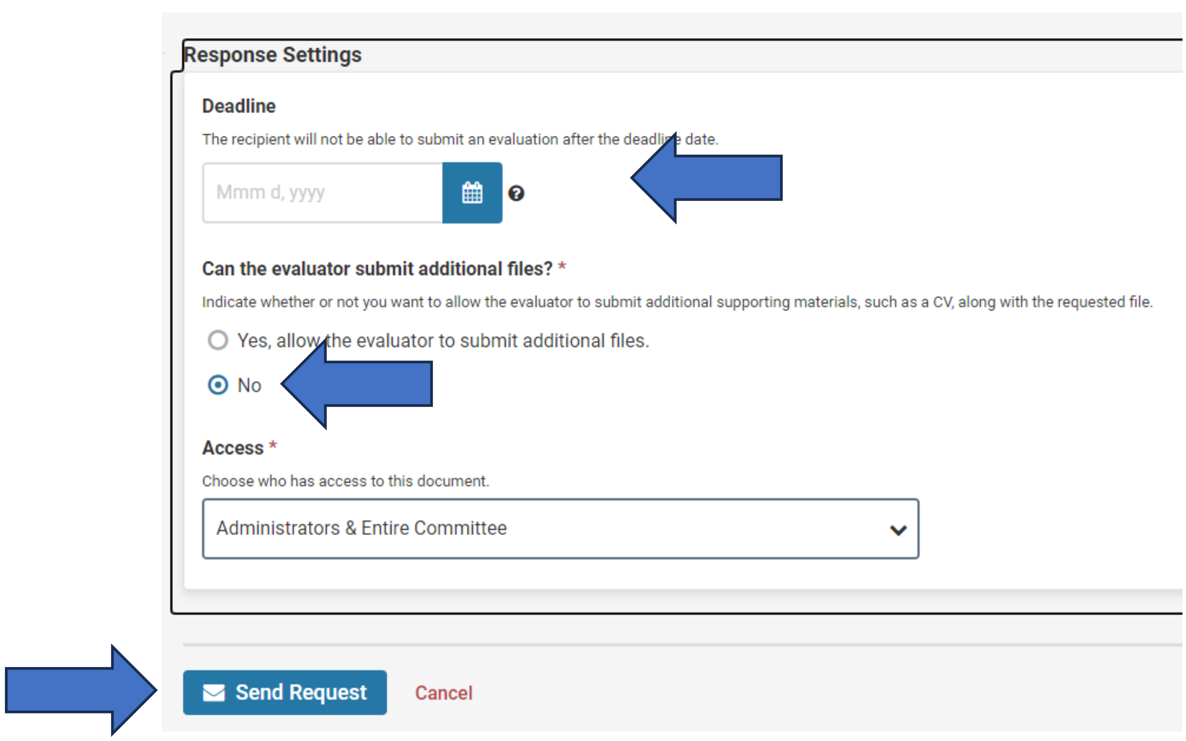
3. If messaging more than one referee at once, you will have the option to personalize the message by following the instructions at the bottom of the "message to evaluator" section. Please note that these instructions only appear once the evaluator information has been entered for at least two referees.



4. 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).



5. 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".

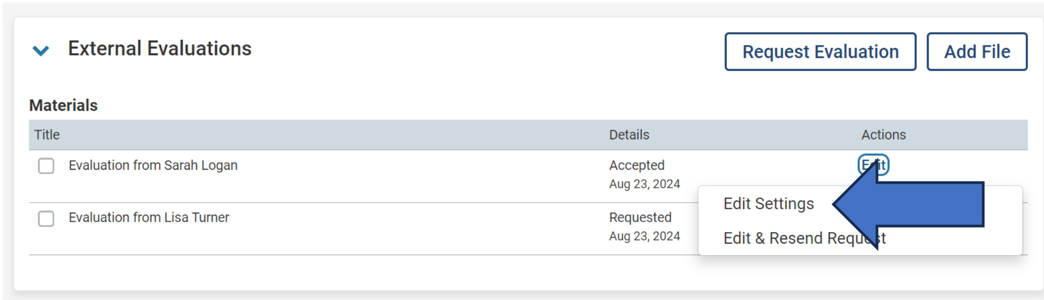


Adding referee letters to a case

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.

1. 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.