Interfolio Case Setup
For Review, Promotion, and Tenure Candidates
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Overview of Interfolio for Review, Promotion, and Tenure</td>
<td>1</td>
</tr>
<tr>
<td>Help Resources</td>
<td>1</td>
</tr>
<tr>
<td>What the system does</td>
<td>1</td>
</tr>
<tr>
<td>The Typical Case Workflow</td>
<td>1</td>
</tr>
<tr>
<td>2 Uploading Case Materials and Submitting</td>
<td>3</td>
</tr>
<tr>
<td>Access Your Case Packet</td>
<td>3</td>
</tr>
<tr>
<td>View Your Packet Instructions</td>
<td>3</td>
</tr>
<tr>
<td>Add Files to Your Case Packet</td>
<td>4</td>
</tr>
<tr>
<td>Use Bookmarks to Organize and Draw Attention to Sections of a Document</td>
<td>4</td>
</tr>
<tr>
<td>Submit Your Case</td>
<td>5</td>
</tr>
<tr>
<td>View Recommendation Letters</td>
<td>6</td>
</tr>
<tr>
<td>Additional Questions</td>
<td>6</td>
</tr>
</tbody>
</table>
Example of a submitted case overview from the view of a candidate.
Overview of Interfolio for Review, Promotion, and Tenure

This help guide is written for candidates who are up for review, promotion, and/or tenure and will use Interfolio to upload and display their materials for review. It is a technical document explaining the steps for loading content into Interfolio and is not a source of authority on the tenure and promotion process as a whole. For more information on the tenure and promotion process, please see the Provost’s office web page on promotion and tenure at https://www.usu.edu/provost/promotion-and-tenure/

Help Resources

This manual is supplemented by additional help resources, including the following:

♦ Your college dossier administrator (See https://www.usu.edu/provost/promotion-and-tenure/ for a list of admins for each college)
♦ Interfolio’s Online Help Center at http://product-help.interfolio.com/
♦ Candidate workshops
♦ Interfolio Support Lines:
  ♦ Phone - (877) 997-8807
  ♦ E-Mail - help@interfolio.com
  ♦ Hours - Mon-Fri, 9AM-6PM Eastern Time
♦ The Center for Innovative Design and Instruction at (435) 797-9506, cidi@usu.edu

What the System Does

Candidates for promotion and tenure used to assemble their portfolios into a physical binder, which contained paper files divided categorically by tabs according to the candidate’s role statement. The files in each tab presented evidence of the candidate’s accomplishment for each role statement area. The completed binder would be passed from the candidate to his or her advisory committee and then on to the various reviewers that followed, each of whom would review the contents of the binder as part of the decision-making and recommendation process. Now, Interfolio facilitates a digital version of the same concept and process. It is a web-based system that:

♦ Accepts file uploads from a candidate and displays them in an organized, categorical manner to specific individuals who have been given permission to view it.
♦ Allows a case to be passed from one review step to another, with recommendations recorded along the way.
♦ Keeps a digital copy of the case for the candidate and others who have been granted permission to view it.
♦ Facilitates communication with the candidate, the reviewers, and the college dossier administrator.

Interfolio is password protected and can be accessed only by individuals with a user account in the system. Unless otherwise specified, an individual’s username and password is the A-number and password used to access the campus portal, Banner, email, and other campus systems.

The Typical Case Workflow

This section briefly outlines the process a typical case goes through from start to finish. The steps a candidate takes for his or her part of the process are explained in the next chapter.

The life of a case is as follows:

1. The college dossier admin (CDA) creates a case for each candidate going up for review, promotion, and/or tenure.
2. The college dossier admin adds members to the appropriate committees for each step the case will pass through.
3. Moderation Point: The college dossier admin notifies the candidate that the case is ready, at which point the candidate can access the case and begin adding files to it.
4. The candidate uploads and organizes files to the appropriate sections of the case.
5. Where external peer evaluations are required, the college dossier admin will later upload evaluations received into the external evaluations section. This section is visible only to admins and committee members.

6. **Moderation Point:** When the candidate is ready, he or she submits the case for review, either all at once or section by section, thus locking off his or her access to continue editing the case. The *advisory committee* reviews the case in the first step.

   *Note that the CDA can unlock a section for a candidate after it has been submitted if an issue arises.*

7. The Advisory Committee reviews the case online and provides the college dossier admin with a recommendation letter and the committee members’ votes.

8. The college dossier admin adds the votes and recommendation letters to the case. The committee chair verifies this was done correctly.

9. **Moderation Point:** The college dossier admin forwards the case for the next step, in which the *department head* reviews the case materials.

10. The department head provides the college dossier admin with a vote and recommendation letter, which the CDA adds to the case. The department head verifies this was done correctly.

11. **Moderation Point:** The college dossier admin forwards the case to the next step, in which the *dean* reviews the case materials.

12. The dean provides the college dossier admin with a vote and recommendation letter, which the CDA adds to the case. The dean verifies this was done correctly.

13. **Moderation Point:** The college dossier admin forwards the case to the next step, in which the *central committee* reviews the case materials.

14. Central committee members access and review the case online and forward their recommendation to the Provost and President.

15. **Moderation Point:** Once the central committee’s work is done and candidates have been notified of the decision on their case, an admin forwards the case to the *closed* step and then closes the case, logging the decision made.
2 Uploading Case Materials and Submitting

This chapter provides step-by-step information on how to add content to your case in Interfolio. Much of the text in this section is adopted from the Interfolio help guides at http://product-help.interfolio.com/.

Access Your Case Packet

You will be notified that your case is ready via email.

Select View Case in the email, or go to https://dossier.usu.edu to login. You will use your A-number and the password used to access other campus systems.

As with other campus systems, login for Interfolio requires Duo authentication.

View Your Packet Instructions

1. Click the link to view your packet.

An overview page appears, listing the materials and forms you are able to add to your packet.

2. Click Instructions in the upper right corner of the page to view any instructions provided by your college for assembling your packet.
Your packet is divided into sections according to the categories in your role statement, each with a list of materials you may upload in order to complete each section.

If your sections don't match your role statement, check with your CDA, who can add or remove sections.

You might also see due dates for each section, if they have been set. Each section of the packet can be submitted once requirements for the section have been met.

Add Files to Your Case Packet

1. Click Work on Packet.

A page opens where you can upload files to the various case sections.

2. Click Add File to upload materials to your packet.

3. Drag and drop, or browse to upload document or image files.

4. Upload your files and click Add.

5. The new file appears in your case under the section you added it to. At first, it appears in gray text with an hourglass icon next to it. This indicates that it is being converted for viewing in the Interfolio reader.

6. You can give the file about 30 seconds to a minute or so to convert, then refresh/reload the browser page to see its status. (The status won't update without a page reload.) When it is done converting, it will appear as a blue link with a file icon.

7. For videos, click the Video tab to add a link to a YouTube or Vimeo URL to your packet.

8. Select the Webpage tab to include a link to a webpage in your packet. Do not include webpages as primary evidence, but only as supplemental resources.

Make sure to add a title and description to provide context for your link.

9. If you need to edit or replace a document or item, click the edit pencil or trash can.

You can edit the title of the file or click Replace to choose a new file to replace it.
Use Bookmarks to Organize and Draw Attention to Sections of a Document

Interfolio automatically recognizes bolded sections and headline formatting in documents created in a word processing or similar program.

Sections such as the ones illustrated above will appear to reviewers as bookmarks in the left hand pane of the document reader. Note that even subsections are bookmarked in the reader, as shown below.

You can preview how your packet will appear to reviewers. When working on your packet, click on the name of an uploaded file to preview it in the viewer.

Submit Your Case

1. Click Review and Submit when you are ready to submit completed sections.

2. Select which sections of your packet you want to submit

3. You can preview your packet before submitting.

The preview shows exactly how the packet you are submitting will appear to your committee.
4. Click **Submit Packet** when you are ready

You will also see a notification that files are available for your review.

5. Your packet will be sent to the appropriate committee for review. The sections you submitted will be locked for editing. Only your college dossier admin will be able to unlock a section for you once it has been submitted.

View Recommendation Letters

Reviewers at each step provide a recommendation letter that is uploaded to your case. By policy, these are to be shared with you shortly after they are provided.

When a recommendation letter, or any other committee document, is shared with you, you will get an email prompting you to log in and view the shared files.
**Additional Questions**

Once again, if you have additional questions or need further assistance, you may look to one or more of the following resources:

♦ Your college dossier administrator (See [https://www.usu.edu/provost/promotion-and-tenure/](https://www.usu.edu/provost/promotion-and-tenure/) for a list of admins for each college)


♦ Interfolio Support Lines:
  ♦ Phone - (877) 997-8807
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