INTERFOLIO REVIEW, PROMOTION AND TENURE (RPT) – CREATE A CASE	
All RPT committee participants must be added to "Users" list in "Users & Groups" tab on left side of Interfolio RPT Home Page in order to be added to a new or existing committee. If you do not have access or need assistance to add a user, please contact your VP Coordinator in your Dean's office. VP Coordinators, please check/add/update as needed your Dean, Department Chair, Department Administrator, Department Faculty/Staff, Promotion Tenure Committee/PTC Chair and members to Faculty RPT Users list or Committee list as needed before creating a new case. Committees are groups of users that can review and assess the case of a candidate at a given step in the review process. Individual reviewers can also act as a committee at a given case review step. Administrators can create committees made up of any institutional users for each step of your workflow. You can then assign committees and individuals to review a case at a certain step. Basic instructional links for Interfolio RPT process are listed on the last page below.	
TO CREATE A CASE: Select "Cases" tab on left side of RPT Home Page (Individual would see all cases to which they have access)	
Click "Create Case" located upper right corner of page (Brings you to "Add New Case" page)	
Select Organizational Unit for this case & Select Template (predesigned Provost templates are to be used as a guide by Dean VP Coordinators. VP Coordinators will select "Options" dropdown on right side of selected template to "create a duplicate" for cases within unit and update template per Dean guidelines)	Brings you to New Case page where your "Blank Case" is listed. You would then select the appropriate Provost "Template" for your case. Example: Provost Template – Junior Faculty/Tenure Track/Promotion, Provost Template – Senior Faculty/Promotion Each template has basic requirements for each step. Units may customize the template for their area and add further instructions, guidelines/links as needed.
Once you select template, New Candidate/Case Information will need to be completed	▪ Type name of candidate in "Search for candidate" section and select candidate ▪ Will the candidate be involved in this evaluation - Select Yes/No. Yes is the standard response. (Choose "Yes" if the candidate will submit their own materials and you would like to communicate with them during the evaluation period**. Note: This setting cannot be changed after this step).** ▪ Click Save & Continue at bottom of page which will lead to Candidate Requirements page. ▪ <u>Enter: Candidate's Packet Due Date</u> ▪ Add: Customized Instructions as needed
Case Data Forms (Add Case Data Form)	Case data forms can be created and used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the Administration tab page for respective unit.
Candidate Forms (Provost Office created a candidate form "Promotion and Tenure – Personal Information" for candidate to complete listing rank, promotion history, education, professional experience).	Candidate Forms can be used to collect additional information directly from candidates at your institution. Forms can be created at any unit in your institution and will be available for use at all units below it in your institutional hierarchy. Administrators can attach forms to cases or templates.

Candidate Requirements	Packet requirements will be listed per the template. There is an option for special circumstances only to "Allow candidates to add their own sections to the packet." Should remain unchecked for standard case procedure.
Department Administrator (Committee Manager) – Notify Candidate	Once the Department Administrator has created and reviewed the case and is ready to submit to candidate, Department Administrator will notify the candidate through Interfolio RPT. To notify candidate to begin assembling their packet for review, you need to select "cases" from the left hand navigation menu, and select the "candidate" you want to notify. Then click "notify" and choose whether or not you wish to "send a message with this notification", then click "send" when you are ready to do so. Please see instructional Interfolio help link: https://product-help.interfolio.com/m/33238/l/344703-notify-a-candidate-of-their-review
Statuses – (Administration tab)	A list of Provost statuses have been created which can be applied to any case within Provost area. Statuses are located under the Administration Tab on left side of RPT module. Department Administrator facilitating the case will update status as case moves along review process. Status examples: Under Review PROV – Associate Rank Promotion with Tenure Granted PROV – Full Rank Promotion Granted PROV – Associate Rank Promotion Granted with Tenure Pending Chancellor Decision These statuses are meant for organizational and reporting purposes, so you can easily see where individual cases currently are, along with their ultimate outcome. **Committee Managers and Administrators are also able to add a custom status at the individual case level when needed** by selecting "change" under "status" action located at top right of individual case page. Once selected, scroll down to bottom of statuses and click "Add Custom Status" to create new status for the case. Type name of new status within "add new status" then select save.
External Evaluations External evaluations are an integral component of the review process, so Interfolio incorporated tools that streamline this process and make it easy for Administrators to request evaluations from scholars that are outside of the committee, or even outside of your institution. An Administrator or Committee Manager in Interfolio RPT can request evaluations from one or more external evaluators from the case page of a candidate. These requests come in the form of an email; you'll be able to customize the subject and message of the	External Evaluations: (Create a New External Request, Edit & Resend an External Evaluation Request) https://product-help.interfolio.com/m/39937/l/357904-external-evaluations How to Bundle Candidate Documents to send to External Evaluators https://product-help.interfolio.com/m/33238/l/758649-how-to-bundle-candidate-documents-to-send-to-external-evaluators

email, set a due date and attach files from the case to help the evaluator complete their review. Importantly, you can also set who from the committee (the Administrator only, the Committee Manager, or the entire committee) can see the evaluation once it is received. Note that you can send requests to multiple evaluators using a single form (which will include a message, all attached files, and due dates etc.). Also, if you'd like to use Interfolio RPT to solicit names of potential external evaluators from the candidate up for review, you can do so with a custom form that you create for the candidate to fill out, or with a required document that you ask the candidate to upload themselves. The candidate will never be notified or be able to see the external letter.	For External Evaluators: Guide to Providing Requested Evaluations in Interfolio RPT https://product-help.interfolio.com/m/39937/l/606353-for-external-evaluators-guide-to-providing-requested-evaluations-in-interfolio-review-promotion-and-tenure
Adding Committees or Individuals to a Case Review Step	https://product-help.interfolio.com/m/33238/l/536627-add-committees-or-individuals-to-a-case-review-step https://product-help.interfolio.com/m/33238/l/344666-create-a-new-standing-committee **(HELPFUL LINK: THIS LINK REFERENCES OPTION TO CLICK THE "STAR" NEXT TO A MEMBER'S NAME TO MAKE THEM A COMMITTEE MANAGER)** One or more standing or ad-hoc committees, or even individual reviewers can be added to a case review step when creating or editing a case. If multiple committees or individuals have access to a case at the same case review step, reviewers will have access to the case documents and responses to candidate forms at the same time. Committee instructions, voting records, and conversations will only be visible to their respective committee, no matter how many committees or individuals have access to a case at a given step in the workflow. Committee Managers and Evaluators with only one committee assignment will see the instructions, voting records and conversations for their assigned committee at a given step. Committee Managers and Evaluators with more than one committee assignment (or individual access), can toggle their view to see the instructions, voting records and conversations for each of their assigned committees. To add Committees or Individuals to a Case Review Step:

	▪ Navigate to the case you want to edit by clicking on the name of the candidate in the list of cases ▪ Click "Case Options" and select "Edit Case" ▪ Select "Case Review Steps" from the "Creating a Case" menu to the right of the page ▪ Find the step you want to edit and click the edit pencil to the right of the page ▪ Click "Add Committee" ▪ Select to add a standing committee, ad-hoc committee, or individual user (Standing committees are created at the unit level (i.e. university, school, college etc.) and can be reused for cases in that unit. Ad-hoc committees are created on a per case basis. An administrator in the Dean area will need to add members to this committee before a case can be initiated. An individual user can review the case, but will not be able to collaborate with others. To allow multiple members to review together, create a standing or ad-hoc committee). ▪ Make your selection and click "Add" ▪ Set whether or not each committee or individual can move the case forward or backward (If checked, the manager of the committee, or the individual reviewer can move the case forward or backward in the workflow of case review steps. ▪ If necessary, click "Add Committee" to give another committee or individual access to the case at this step
Upload Documents to satisfy committee document requirements for a Case Review Step	https://product-help.interfolio.com/m/33238/l/719931-upload-documents-to-satisfy-the-committee-document-requirements-for-a-case-review-step

Case Review Steps	In Interfolio Review, Promotion & Tenure, Administrators can set up a workflow of case review steps matching the stages of review process. Multiple committees or individuals can be granted access to a case at each review step. Case review steps are generally set up when creating a template for new cases, when creating a case from a template, or when creating a new case from scratch. If an Administrator has set document requirements for a case review step, the manager of the committee at that step, or individual reviewer, must upload those documents before the case can be moved forward to the next step in the workflow. If a case review step has multiple committees with document requirements, all required documents for all committees must be satisfied in order for the case to move forward. When a case is moved forward or backward, the Administrator or Committee Manager **MUST** include an email message to the members of the committee in the next step gaining access to the case. By default, the box is checked for the Administrator/Committee Manager to "Send Message" with this change to the receiving committee. It is listed as an option per Interfolio, but as per SBU Provost Policy, you MUST send an email, otherwise the next case step committee DOES NOT receive email notification to their SBU email address informing committee members that the case has been submitted for committee review. You may view screen shots and further instructions regarding this process at the link below: Moving the Case Forward/Backward (Screenshots)

Best Practices for Managing Reviews with RPT	https://product-help.interfolio.com/m/39937/l/677284-best-practices-for-managing-reviews-with-interfolio-review-promotion-tenure
Candidate – Case/Enter Packet Materials	When a case is created for a candidate, they will receive an email notifying them that a review has been initiated on their behalf, and prompting them to log in and begin working on their packet of materials to be submitted via Review, Promotion, & Tenure. Once logged in, the candidate will select "Your packets" from the screen to left. The candidate will see an "Overview" page listing the required materials and forms you will need to add to your packet. The candidate will click "Edit Packet" to begin work on their packet. The candidate can click "View Packet Instructions" in the upper right corner of the page to view any instructions provided by your institution for assembling your packet. Their packet will likely be divided into sections, each with a list of materials to upload in order to complete each section. If a due date has been set, the candidate will also see the due date for each section. Each section of the packet can be submitted once all requirements for the section have been met. **Note that individual packet sections can have unique due dates.** Candidates will see each packet section with the application requirements listed below them. The packet section will be labeled "Incomplete" until all required documents or forms have been submitted for the packet section. When a requirement is completed, a check mark will appear next to the requirement. Sections are also marked off as they are completed. Form requirements are marked "View" and will be marked off as the candidate completes them. The candidate can click "Preview" to see how the packet sections they are submitting will look upon submission. Candidates click "Review and Submit" when they are ready to submit their packet.

IMPORTANT REMINDER:	
HELP LINKS: **Help for Interfolio Review, Promotion & Tenure** ▪ Help for Review, Promotion, and Tenure Candidates ▪ Managing Units, Users, and Administration Settings ▪ Creating and Managing Templates ▪ Creating and Managing Committees ▪ Creating and Managing Cases ▪ Working with Case Data and Candidate Forms ▪ RPT Reports & Logs ▪ Reviewing Cases ▪ Communicating with Candidates and Committee Members ▪ Managing Documents ▪ Requesting External Evaluations ▪ Faculty Activity Reporting And RPT	https://product-help.interfolio.com/m/33238

Access to Interfolio Client Community – located under your Name/Drop Down on upper right side of your Interfolio home page (will need to establish separate password and the user name is your SBU email)	Interfolio Client Community! Engage with your peer institutions. Please take a look at our Groups and join any and all that are relevant to you to start a dialogue with fellow clients.
Access Product Help (also listed in Name/Drop Down upper right side of homepage)	Help for applicants, candidates, and letter writers using Interfolio Dossier.
User Roles	https://product-help.interfolio.com/m/33238/l/791714-user-roles-in-interfolio-review-promotion-tenure
Candidate's Guide	https://product-help.interfolio.com/m/33238/l/658092-a-candidate-s-guide-to-interfolio-review-promotion-and-tenure
Committee Manager's Guide	https://product-help.interfolio.com/m/39937/l/386718-committee-manager-s-guide-to-interfolio-review-promotion-and-tenure
Committee Member's (Evaluator's) Guide	https://product-help.interfolio.com/m/39937/l/606362-committee-member-s-guide-to-bycommittee-p-t
External Evaluator's Guide	https://product-help.interfolio.com/m/39937/l/606353-external-evaluator-s-guide-to-bycommittee-p-t
Help for Dossier Interfolio **Dossier** is a free online platform for scholars to collect and curate scholarly materials, request and receive confidential letters of recommendation, and prepare for upcoming evaluations. Your Dossier never expires and we will store your documents indefinitely.	https://product-help.interfolio.com/m/27438
Adding & Managing Case Materials	https://product-help.interfolio.com/m/33238/l/344721-adding-and-managing-case-materials
Share Case Materials with Candidate and Allow Candidate Response	https://product-help.interfolio.com/m/33238/l/677311-share-case-materials-with-a-candidate-and-allow-candidate-response-rebuttal
Support Contact Info: help@interfolio.com / 877-997-8807 (9:00 am – 6:00 pm Eastern Time M-F)	