

INTERFOLIO RPT - FAST FACTS/TROUBLESHOOTING

- 1. EXTERNAL EVALUATIONS – RESENDING AN ORIGINAL REQUEST:** If an external evaluation request is sent to an evaluator and then an entirely new request is sent to the same evaluator (as opposed to [re-sending](#) the original request), the Interfolio system designates the requests as two separate requests even if they are sent to the same email address.

<https://product-help.interfolio.com/m/33238/l/344723-manage-external-evaluations#click-quot-edit-amp-resend-request-quot>

To avoid duplicates going forward, re-sending the request to evaluators as opposed to creating entirely new requests will resolve creating a duplicate request. Once an evaluator has interacted with a request (accepted, declined, or uploaded their letter) the request or letter can't be deleted.

Additional External Evaluation Help Links:

Edit Setting of a Request

<https://product-help.interfolio.com/m/33238/l/344723-manage-external-evaluations#click-the-pencil-icon-next-to-the-evaluation-and-select-edit-resend-request>

Cancel a Request

<https://product-help.interfolio.com/m/33238/l/344723-manage-external-evaluations#cancel-request>

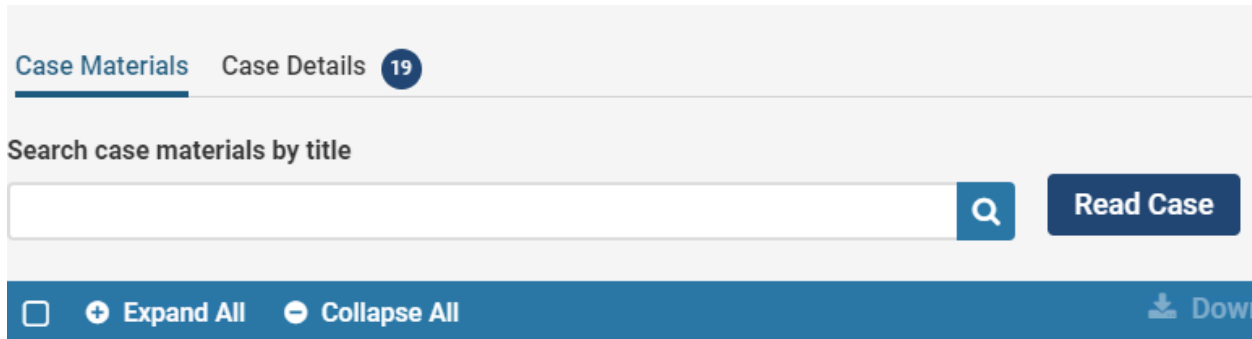
Manage Evaluation files

<https://product-help.interfolio.com/m/33238/l/344723-manage-external-evaluations#manage-evaluation-files>

2. ADD CASE "REQUIRED DOCUMENTS" – (2 Options)

Option 1 - Add your required document under the "Case Details" tab: (You will need to repeat this process if case step has multiple required documents)

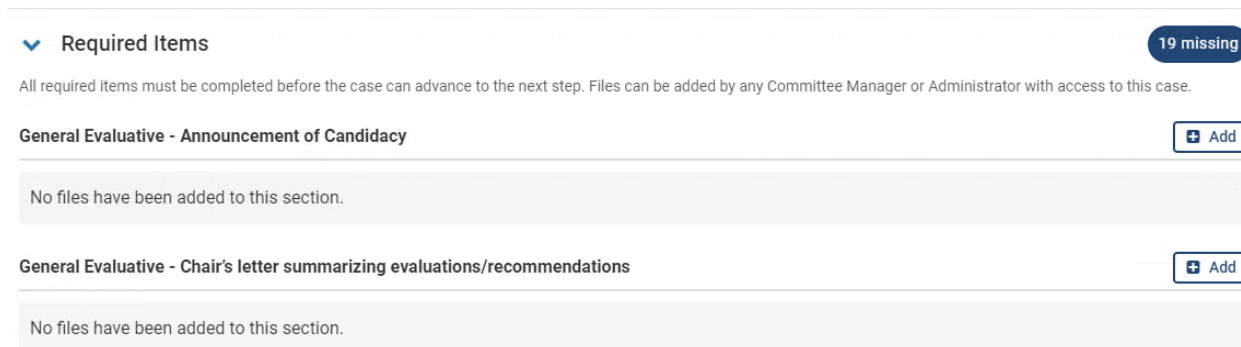
If your case step includes required documents the number of documents required for that case step will be circled and listed to the right of "case details" tab.



Case Materials Case Details **19**

Search case materials by title

Please go directly to the "Case Details" tab and under "**Required Items**" click "**Add**"



Required Items **19 missing**

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

General Evaluative - Announcement of Candidacy

No files have been added to this section.

General Evaluative - Chair's letter summarizing evaluations/recommendations

No files have been added to this section.

Then click "**Upload a new file**" for your required document:

Add General Evaluative - Announcement of Candidacy ✕

Upload a new file Select file from case



Drag & Drop your files anywhere or

Browse To Upload

+ Add

Cancel

Next, you must choose the appropriate Internal Section of the case from the drop down menu, for example, "General Evaluative", where your required document will be filed. The drop down menu defaults to the first section, "General Evaluative." If General Evaluative **is not** the correct section for your required document, remember to select from the drop down menu the appropriate Internal Section, for example, Dean's Recommendation, for your required document to be filed in the case.

Add General Evaluative - Announcement of Candidacy ✕

Upload a new file Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

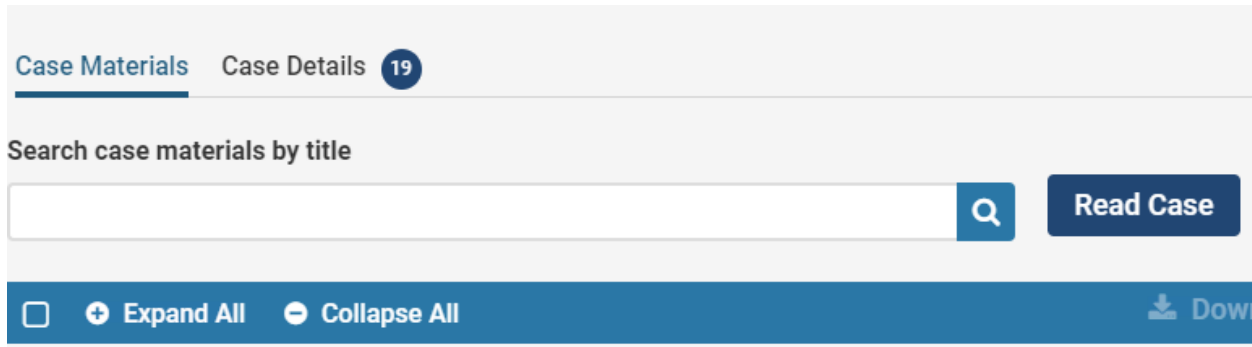
| | |
|--|--|
| Name * | Section * |
| 1 - GEN EVAL ANNOUCEMENT | Department Administrator - General Evaluati ▼ |
| Department Administrator - General Evaluative Documents | |
| Department Administrator - Special Evaluative - (CONFIDENTIAL SECTION-CANNOT SHARE WITH CANDIDATE) | |
| Promotion & Tenure Committee Recommendation - (CONFIDENTIAL SECTION-CANNOT SHARE WITH CANDIDATE) | |
| Dean's Recommendation | |
| Provost VPC Documents | |
| Provost's Recommendation | |
| President's Recommendation | |
| External Evaluations | |
| Candidate Evaluative Response | |

+ Add Cancel

Additional Interfolio Help Link: Upload Documents to Satisfy the 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>

Option 2 – Add your required documents under the "Case Materials" tab:



Current Alert– Please see below and Interfolio video link for further instructions:

Interfolio has informed us of a known bug they are currently working to fix. The bug causes the list of available case files to not populate for “required document” fulfillment, unless the “Internal Sections” housing the documents are expanded. Until the bug is fixed, you'll need to click "**Expand All**" noted in the following link and above screenshot, and then the list should populate for you to select the appropriate required documents.

<https://www.loom.com/share/0c7d288bc08c426dbb327cd6bdcc9aa2>