

Request/Add an External Evaluation for a Case

When creating a template or case, a Unit Administrator, Template Administrator, or Case Manager can elect to include an External Evaluation section through which evaluations can be requested or added to the case packet. Unit Administrators, Case Managers, and Committee Managers can then request evaluations from scholars who are external to the committee (or even the institution) to help them evaluate a candidate.

Only Unit Administrators, Case Managers, and Committee Managers can add or request external evaluations. The buttons and procedures explained below will not appear on the case page when viewed by a committee member who is not also a Unit Administrator, Case Manager, or Committee Manager for the case.

It is important to note that external evaluations cannot be deleted after they have been interacted with (accepted or declined by the external evaluator).

Add External Evaluations

Select the tabs below to view more information on two different ways to add external evaluations to a case.

Request
Upload

Unit Administrators, Case Managers, and Committee Managers can upload an evaluation they have on their computer to the candidate's case.

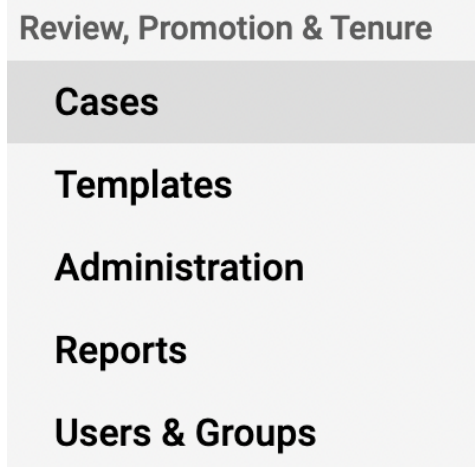
show all

hide all

1. Navigate to Request Evaluation under Candidate Case

Navigation: Cases > Name > Request Evaluation

- i. Click **Cases** under Review, Promotion, & Tenure on the navigation menu.



- ii. Click the **Name of the Candidate** for the desired case.
- iii. Click **Request Evaluation** under the *External Evaluations* section.



2. Configure and send email

i. Enter the **Name** and **Email** of the external evaluator(s) on the *Request External Evaluation* page.

Note that multiple evaluators can be added by clicking the Add Another Evaluator button.

ii. Change the **From Name** and **Reply-to** address, if desired. Be sure to give the email request a meaningful **Subject** line.

iii. Enter the email **Message** to the evaluator.

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

- Click **Preview Email** to see how the request email will appear to the external evaluator

iv. Click **Add Files** under the *Files* section to attach useful files to the requested email if necessary. The files added here can be downloaded by the recipient when they accept the invitation to write an evaluation.

- Select file **Name(s)** using the checkboxes and click **Add Files** when finished.

v. Select a **Deadline** under the *Response Settings* section.

This is a Hard Deadline, meaning the recipient will not be able to submit an evaluation after the deadline date.

vi. Indicate whether or not the evaluator can **submit additional files**. If Yes is selected, the evaluator will be presented with the option to add up to ten additional files.

Check out the article on how to Allow Evaluators to Add Additional Files to External Evaluations.

vii. Select who can **Access** the request and evaluation once it is uploaded using the dropdown.

viii. Click **Send Request** when finished.

Unit Administrators, Case Managers, and Committee Managers can request evaluations from one or more external evaluators through Interfolio RPT by email. External evaluators will receive the email with instructions for submitting the document and can upload it directly to Interfolio without having an Interfolio account. It is possible to request evaluations from multiple potential evaluators at the same time to save time.

Check out the article on how to provide requested evaluations for external evaluators for more information on how evaluators can respond to email request.

External evaluators will receive automatic reminders seven days and one day before the set deadline. Please note that this is a hard deadline. No additional reminders are sent after the deadline passes, if the evaluator declines the request, or if the evaluator submits the evaluation before a reminder is sent.

show all

hide all

1. Navigate to Add File under Candidate Case

Navigation: *Cases > Name > Add File*

i. Click **Cases** under Review, Promotion, & Tenure on the navigation menu.

ii. Click the **Name of the Candidate** for the desired case.

iii. Click **Add File** under the *External Evaluations* section.

> External Evaluations

Request Evaluation

Add File

2. Upload evaluation

- i. Click **Browse To Upload** to locate the file containing the evaluation.

Further Actions to Take

show all

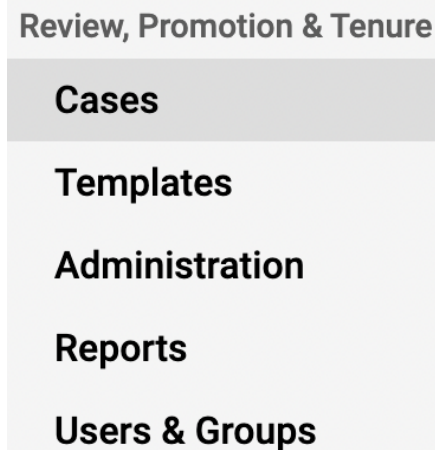
hide all

View Reporting for External Evaluations

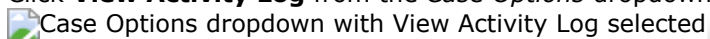
When a Unit Administrator, Case Manager, or Committee Manager uploads an external evaluation, it is recorded in the Activity Log.

Navigation: *Cases > Name > View Activity Log*

1. Click **Cases** under Review, Promotion, & Tenure on the navigation menu.



2. Click the **Name of the Candidate** for the desired case.
3. Click **View Activity Log** from the *Case Options* dropdown at the top of the page.

Case Options dropdown with View Activity Log selected

The Case Activity Log shows:

- Who requested an evaluation
- When the evaluation was requested
- When the evaluation was submitted/added
- Who uploaded the evaluation

A report allowing a client to view who has submitted, declined, or accepted but not submitted an evaluation request is not automatically available within RPT. This must be a feature request.

Share Documents

Unit Administrators, Case Manager, or Committee Managers can share documents with the candidate using the document sharing feature.

Documents added to the External Evaluations section using the Add File button, or evaluations requested through the External Evaluation section using the Request Evaluation button are uploaded as confidential documents that cannot be shared with the candidate, even when they are moved to another part of the packet.

- It is not possible to include confidential documents, including external evaluations, among the materials being shared with the candidate.
- It is possible, to share non-confidential documents, even when those documents have been moved into the External Evaluations section.
- For sharing files, what matters is whether they are uploaded as confidential documents. They will remain confidential, no matter where they appear in the packet. Likewise, non-confidential materials will remain non-confidential no matter where they appear in the packet.