EVALUATOR'S QUICK REFERENCE GUIDE TO INTERFOLIO

How Do I Access Interfolio?	Interfolio is available via CSULB's Single Sign-On at https://myapplications.microsoft.com/ Simply log in with your CSULB credentials AND click on the ⓘ interfolio chiclet.
How Do I Access A Candidate's Case?	To access a candidate's case, click **Cases** located in the menu on the left.

CALIFORNIA STATE UNIVERSITY LONG BEACH

Home

Your Packets

Review, Promotion and Tenure

Cases ⟵

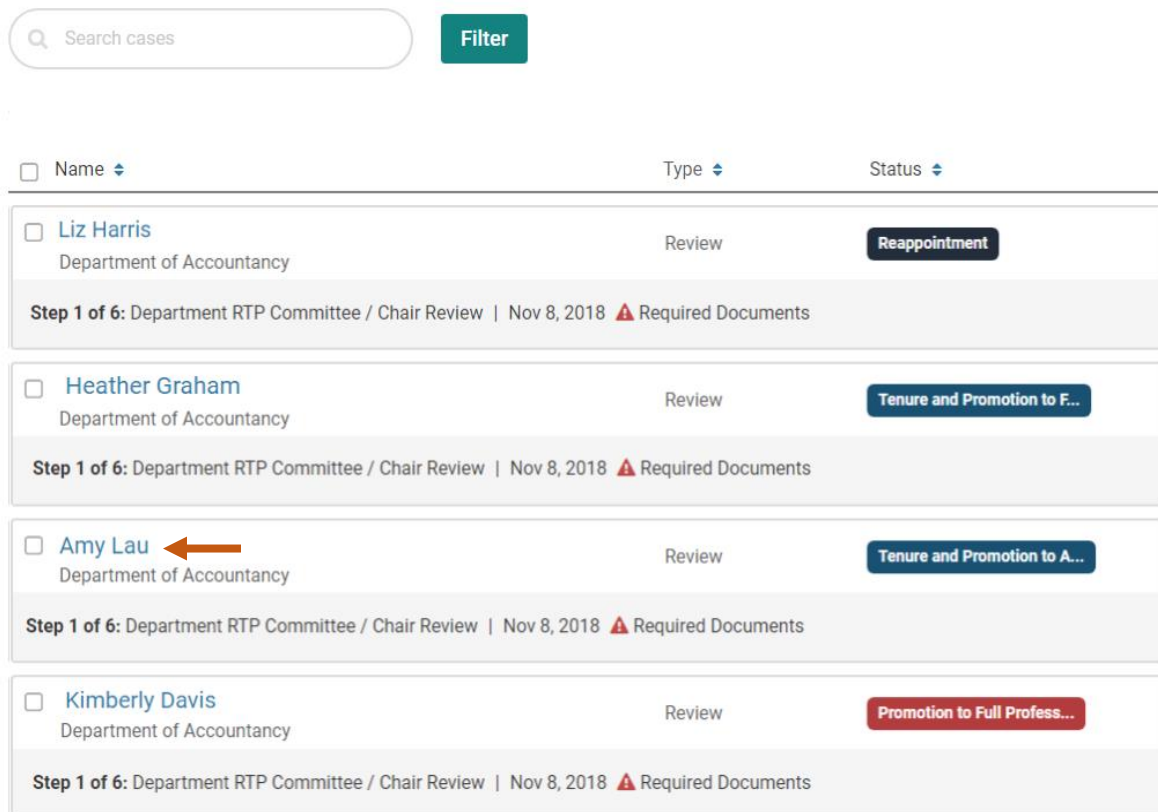Welcome back, Liz Harris

Your Action Items

Only cases relevant to your role(s) as an evaluator will display.

To access a specific case, click on candidate's **name**.

California State University-Long Beach ›

Case List

[Search cases] [Filter]

☐ Name ⬍	Type ⬍	Status ⬍
☐ Liz Harris Department of Accountancy	Review	**Reappointment**
Step 1 of 6: Department RTP Committee / Chair Review	Nov 8, 2018 ⚠ Required Documents		
☐ Heather Graham Department of Accountancy	Review	**Tenure and Promotion to F...**
Step 1 of 6: Department RTP Committee / Chair Review	Nov 8, 2018 ⚠ Required Documents		
☐ Amy Lau ⟵ Department of Accountancy	Review	**Tenure and Promotion to A...**
Step 1 of 6: Department RTP Committee / Chair Review	Nov 8, 2018 ⚠ Required Documents		
☐ Kimberly Davis Department of Accountancy	Review	**Promotion to Full Profess...**
Step 1 of 6: Department RTP Committee / Chair Review	Nov 8, 2018 ⚠ Required Documents		

EVALUATOR'S QUICK REFERENCE GUIDE TO INTERFOLIO (continued)

How Do I Access Case Materials?	Click **Read Case** to review the case materials.

A table of contents will display on the left, with a view of the content on the right.

Click on a section to view the materials within the section OR click on a specific document or file to view.

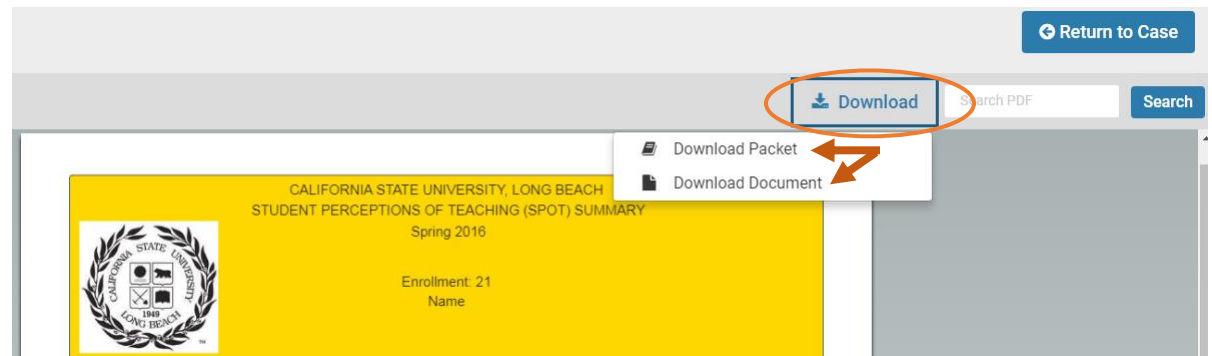|	
How Do I Download Case Materials?	Click 📥 **Download** and select 📖 Download Packet OR 📄 Download Document. ![Download interface screenshot showing Return to Case button, Download dropdown with Download Packet and Download Document options, and a California State University, Long Beach Student Perceptions of Teaching (SPOT) Summary, Spring 2016, Enrollment: 21, Name] **Evaluation materials and recommendations are confidential.** **CSULB's Information Security Policies, Standards and Procedures** are available here for your reference.
How Do I Upload Open Period Materials to the Case? **Dept Committee Chairs ONLY**	Scroll down to the **Open Period** section of the case and click ➕ Add File. > REQUEST - Non-Consideration for Promotion ➕ Add File ✏️ ⌄ Open Period ➕ Add File ✏️ ⌄ Department RTP Committee Evaluation ➕ Add File ✏️
	Click **Browse To Upload** or use "**Drag and Drop**" to upload the Open Period materials with Index. **Add Document** ✖ Upload Video Webpage Drag & Drop your files anywhere or **Browse To Upload** ✔ Save Cancel	Click ✔ **Save**. **Add Document** ✖ Upload Video Webpage Open Period Letters w/ Index ✖ ✔ Save Cancel
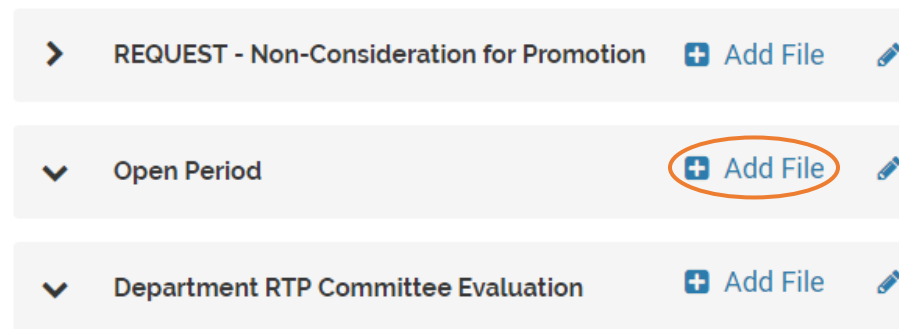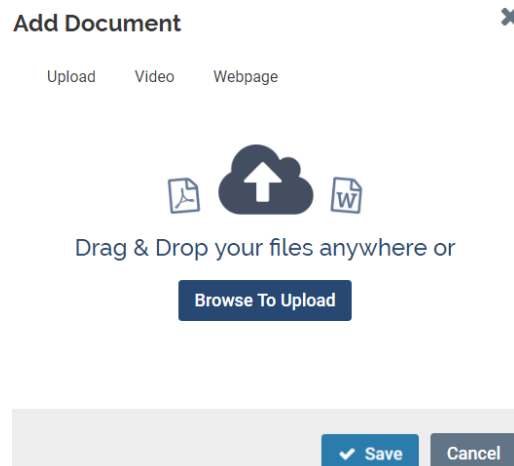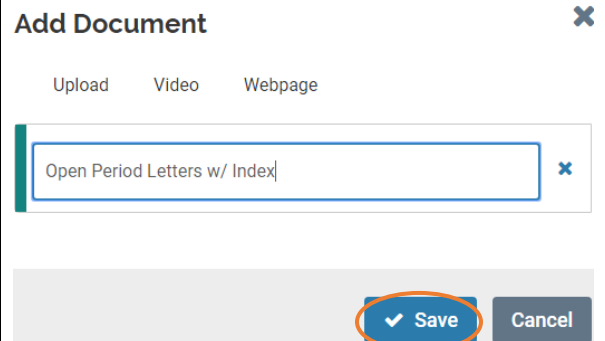
How Do I Upload The Committee's Evaluation to the Case? **Dept & College Committee Chairs ONLY**	1. Navigate to the **Case Details** tab. California State University-Long Beach › Cases › **Amy Lau** **Unit** Department of Accountancy Case Materials Case Details 1 🔍 Search Case Materials **Read Case**	2. Under Required Documents, click ➕ Add. ∨ **Required Documents** 1 missing All required documents 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. **Department RTP Committee Recommendation** ➕ Add No files have been added to this section.
	3. Click **Browse To Upload** or use "**Drag and Drop**" to upload the committee's evaluation. **Add Department RTP Committee's Recommendation** Upload a new file Select file from case 📄 ☁️ 📝 Drag & Drop your files anywhere or **Browse To Upload** ➕ Add Cancel	4. Select the **Section** to which the evaluation should be uploaded (i.e., Department RTP Committee Recommendation) and click ➕ Add. **Add Department RTP Committee's Recommendation** ✕ 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 *** ACCT RTP Committee Evaluation Department RTP Committee Evaluation ⌄ ➕ Add Cancel
How Do I Upload The Department Chair's Review? **(OPTIONAL)** **Dept Chairs ONLY**	To upload your evaluation of the candidate, scroll down to the **Department Chair's Review** section of the case and click Add File. ❯ Department RTP Committee Evaluation ✏️ Add File ❯ Department Chair's Review (OPTIONAL) ✏️ Add File ❯ College RTP Committee Evaluation ✏️ Add File	
	Click **Browse To Upload** or use "**Drag and Drop**" to upload the **Add Document** ✕ Upload Video Webpage 📄 ☁️ 📝 Drag & Drop your files anywhere or Browse To Upload review. ✔ Save Cancel	Click ✔ **Save**. **Add Document** ✕ Upload Video Webpage Dept Chair's Review ✕ ✔ Save Cancel

How Do I Upload Missing Or New Material To A Case? **Dept & College Committee Chairs ONLY**	Scroll to the section of the case to which the missing or new material should be added and click ➕ Add File . RSCA - Peer Reviewed 🔒 ➕ Add File ☐ SIAM REVIEW 📄 — Sep 27, 2018 at 10:52 AM ✏️ ☐ ACTA MATHEMATICA 📄 — Sep 27, 2018 at 11:02 AM ✏️ **Requests to add new material to an RTP file after the submission deadline must be approved by the College RTP Committee.**

Click **Browse To Upload** or use "**Drag and Drop**" to upload the missing or new material to the appropriate case section. **Add Document** ✖ Upload Video Webpage 📄 ☁️⬆️ 📄 Drag & Drop your files anywhere or **Browse To Upload** ✔ Save Cancel	Click ✔ **Save**. **Add Document** ✖ Upload Video Webpage ANNALS OF MATHEMATICS ✖ ✔ Save Cancel

How Do I View A Candidate's Response or Rebuttal?	Scroll down to the **Candidate's Response(s) / Rebuttal(s)** section of the case file, and click on the document within that section to view. ❯ Dean's Review / Decision ➕ Add File ✏️ ⌄ Candidate's Response(s) / Rebuttal(s) ➕ Add File ✏️ ☐ Rebuttal To Dept Chair's Review 📄 — Nov 10, 2018 at 4:11 PM ✏️ ⌄ Provost's Decision ➕ Add File ✏️

EVALUATOR'S QUICK REFERENCE GUIDE TO INTERFOLIO (continued)

How Do I View An Evaluation From A Prior Or Subsequent Review Level?	Scroll down to the section of the case designated for the review level's evaluation (i.e., **College RTP Committee Evaluation**) and click on the document within that section to view.
	∨ Department RTP Committee Evaluation ➕ Add File ✏️
	☐ MATH RTP Committee Recommendation 📄 Nov 8, 2017 at 3:36 PM ✏️
	∨ Department Chair's Review (OPTIONAL) ➕ Add File ✏️
	☐ Dept Chair's Review 📄 Nov 8, 2017 at 5:04 PM ✏️
	∨ ==College RTP Committee Evaluation== ➕ Add File ✏️
	☐ CNSM RTP Committee Recommendation 📄 Feb 10, 2018 at 5:57 PM ✏️
	∨ Dean's Review / Decision ➕ Add File ✏️
	☐ Dean's Recommendation 📄 March 20, 2018 at 8:01 AM ✏️
Technical Questions?	A link to **Product Help** is located on your Interfolio Dashboard. Interfolio can also be contacted directly at help@interfolio.com or (877) 997-8807. If you need further assistance, please contact Somone Washington in Faculty Affairs at Somone.Washington@csulb.edu or 562.985.2267 or Liz Harris at Liz.Harris@csulb.edu or 562.985.1764.