

Interfolio Open Lab Summary

Tuesday Sep 16, 10:00am-11:00am

Facilitator: Somone Washington, Analyst, Office of Faculty Affairs

Special Guest: SPOT Coordinator

Quick recap

The meeting covered discussions about handling records requests and using [Interfolio](#) for document management, including questions about file organization and template orders. Updates were provided on a pilot program for accessing course evaluation reports through a self-serve website, with conversations about data availability and formatting options. The conversation ended with discussions about [support resources](#) and [upcoming deadlines](#), including information about [virtual support hours](#) and available [documentation for candidates](#).

Next steps

- Forward the records request to employeerecords@csulb.edu
- Check with department regarding the status of college GPAs needed for promotion file
- Consult with department chair about preferred file naming conventions for promotion materials
- Check with department chair about how to best organize multiple years of documents within Interfolio sections
- Discuss with department the discrepancy between the RTP policy order and Interfolio's candidate packet section order
- Faculty Affairs: Consider feedback about Interfolio section ordering for future review cycles

Summary

Records Request Handling Process

The SPOT Coordinator and Somone discussed handling records requests, with Somone indicating the Office of Faculty Affairs would process requests through employeerecords@csulb.edu

[Interfolio](#) Document Management Discussion

Attendees asked questions about using Interfolio for document management and organization. Someone explained that while Interfolio allows hyperlinks to external documents, there are no built-in features for creating internal hyperlinks or subfolders within sections. The system uses a **dossier** for managing and categorizing documents, though usage preferences vary between candidates. For file organization, Someone advised that while Interfolio can use naming conventions to help with ordering, manual rearrangement may be needed after upload due to document size considerations, and specific naming conventions should be confirmed with department chairs.

Interfolio Supplementary Materials Order Concerns

Attendee raised concerns about the order of supplementary materials in Interfolio not matching the RTP policy order preferred by the department. Someone explained that the current template order has been used since 2017 and is consistent with the evaluation forms used by reviewers, making it unlikely to cause issues during the review process. While section names cannot be changed within Interfolio, candidates can name their uploaded documents according to the preferred order, and any future changes to the template order would require feedback from departments and colleges.

Course Evaluation Report Pilot Program

The SPOT Coordinator presented updates on a pilot program for accessing course evaluation reports through a self-serve website. Attendee raised concerns about missing reports, including files from the early 2000s, scans from outside of the US, interdisciplinary seminars, and missing reports for 400- and 500-level courses. The SPOT Coordinator confirmed that candidates should see "ATS-spot summary reports" on the [website](#) and provided a web link to the pilot program, explaining it was being tested with a cohort of Interfolio candidates for fall 2025 before broader campus rollout.

SPOT Reports and GPA Data

The SPOT Coordinator discussed the availability of SPOT reports and GPA data, explaining that reports from Spring 2020 to Spring 2025 will be available for direct download, while older reports can be requested by emailing ATS-survey@CSULB.edu. The discussion clarified that while department chairs can provide GPA data, individual course GPAs are confidential and can only be shared through special requests.

Academic Data Consolidation Discussion

The SPOT Coordinator discussed efforts to consolidate academic data into a centralized repository, acknowledging that while progress is being made, it won't meet the current Interfolio deadline. Attendees expressed gratitude for this initiative and requested the

ability to download SPOT summary data in formats like Excel or CSV instead of PDFs, which would reduce manual errors in data entry. The SPOT Coordinator explained that while raw data download is limited by academic policy to aggregated form only, she agreed to explore the possibility of providing data in alternative formats and directed them to check the SPOT dashboards through their My Apps portal.

SPOT Website Features Overview

The SPOT Coordinator discussed the [SPOT website](#) and its features, including instructor recommendations and response rate monitoring. They explained that student data is anonymized for confidentiality, and course evaluations cannot be edited once submitted. The SPOT Coordinator announced virtual support hours on Fridays and Mondays evenings for faculty with questions about the system. She demonstrated how to access the SPOT dashboard and monitor response rates through the Projects section in the hamburger menu.

SPOT Dashboard Data Access Discussion

The SPOT Coordinator presented SPOT dashboards that allow filtering by term and course, though data only goes back to summer 2022 for most departments and spring 2022 for Family Consumer Sciences. Attendee requested the ability to export data to Excel from the dashboards, but The SPOT Coordinator explained this functionality is currently limited by academic policy and would require chair approval to access raw data. The discussion clarified that all documents uploaded to Interfolio are automatically converted to PDF format, with the option to convert to PDF manually if desired for formatting control.

Evaluation Process Policy Clarifications

Attendee raised questions about the evaluation process under revised university and college policies, specifically regarding the transition from department to college policies and how missing or unapproved department policies are handled. Someone advised attendee to email AVP Patricia.Perez@csulb.edu for clarification on these matters. Attendee inquired about documenting missing data in workload spreadsheets, and The SPOT Coordinator suggested including such information in the narrative section, though specific practices may vary by department. Attendee also noted discrepancies in historical college standard deviation data, which The SPOT Coordinator acknowledged as a common inquiry and suggested consulting with department chairs or college administration for clarification.

Course Data Statistical Support Discussion

There was a discussion on how to handle statistical questions about course data. The SPOT Coordinator suggested using the virtual support meetings on Wednesdays, Fridays, and Mondays for confidential discussions, but agreed to handle attendee's specific questions via email due to the detailed nature of the statistical inquiry. The SPOT Coordinator also advised looking at graphs alongside standard deviations to better understand data variations, particularly when dealing with small sample sizes or extreme outliers that might skew results.

Weekend Support and Deadline Guidance

The meeting discussed support availability for an upcoming Monday deadline. Someone clarified that while official weekend support isn't available, she would respond to emails sporadically over the weekend and be in the office Monday 8a-5p, with the deadline set for 11:59 PM Monday. Someone also shared a document with [RTP candidate tips, including resources for Interfolio and tech tips](#), and offered ongoing virtual support through various channels including spot virtual support hours.