

Interfolio Open Lab Summary

Thursday Sep 4, 08:56am-09:48am

Quick recap

The meeting began with an open lab session focused on Interfolio, where participants could ask questions about document evaluation and organization on the platform. Technical discussions covered various aspects of document handling, including upload methods, formatting issues, and the ability to add videos and web content to candidate cases. The session concluded with updates to the SPOT system and an overview of the RTP evaluation process, including resources for preparing candidate packets and meeting important deadlines.

Next steps

- Candidates can use the drag and drop feature in Interfolio to reorder documents
- Candidates can schedule a separate meeting with Someone.Washington@csulb.edu to address issues with Interfolio.
- Candidates to check with their department chairs regarding the use of table of contents in their Interfolio submissions.
- Candidates to contact their department office assistants to get data for the workload assignment form.
- Candidates to contact spot@csulb.edu for SPOT evaluations older than 2020.
- Candidates to begin uploading materials to Interfolio ahead of the September 22nd deadline to avoid system slowdowns.
- Candidates to review the RTP policy versions on the [Faculty Affairs website](#) to decide which policy version they want to be evaluated under.
- Candidates to check the [Faculty Affairs website](#) for upcoming [RTP workshops](#).

Summary

Interfolio Open Lab Session

The meeting was an open lab session organized by Someone to address questions about Interfolio, a platform used for evaluating materials. Someone clarified that the session was informal, allowing participants to ask questions as they prepared their materials for

evaluation. Someone mentioned that if no questions were raised, she would provide an overview of the Interfolio website and conduct a tour.

Interfolio Document Organization Strategies

Two options: creating a naming convention with alphabetical or numerical prefixes to control upload order, or using drag-and-drop after uploading. Someone demonstrated the drag-and-drop functionality and clarified that while folder uploads aren't possible, documents within folders can be selected and uploaded individually or in bulk.

Interfolio Document Handling Challenges

Candidate inquired about the use of table of contents in Interfolio, and Someone advised consulting the department chair or peers who had used the system before for guidance.

Interfolio Video Upload Guidelines

Candidate asked about uploading video and other materials to Interfolio, and Someone explained that while Interfolio doesn't restrict uploads, videos must be from YouTube or Vimeo. Someone demonstrated how to add videos and web pages to a candidate case, and explained that materials can be uploaded directly or linked from the existing Interfolio Dossier. Someone showed how to access and manage the Interfolio Dossier, where materials can be uploaded and organized ahead of time for future evaluations.

SPOT System Updates and Features

Dave, an Assistant Director of Data Analytics and Communications, visited to discuss updates to the SPOT system. He introduced a new feature allowing users to download all SPOT reports in one place, with plans to enhance functionality for easier bulk downloading. Dave addressed questions about aggregating reports into PDFs, accessing older evaluations, and retrieving course GPA data, explaining that these would require departmental decisions or assistance from administrative staff. He also mentioned that office hours for SPOT-related queries were being finalized and would be communicated soon.

RTP Evaluation Process Overview

Someone provided an overview of the RTP (reappointment, tenure and promotion) evaluation process, including access to instructional memos, guidelines, and deadlines on the [Faculty Affairs website](#). She explained the difference between open period letters and letters of support, and introduced resources such as the Probationary Review Map, Post-Probationary Review Map, and a comprehensive list of RTP-related policies. Someone also

mentioned a new RTP policy selection form within Interfolio that allows eligible candidates to choose which policy version they want to be evaluated under.

Candidate Packet Preparation Resources Overview

Somone provided an overview of available resources for preparing candidate packets, including [Interfolio's website](#), tech support options, and workshops. She emphasized the importance of planning ahead for the September 22nd deadline and using departmental resources for guidance. Somone also shared technical tips for using Interfolio, recommending Google Chrome as the preferred browser and suggesting system updates and cache clearing as potential solutions for issues.

Upcoming Workshops

- Strategies for a Successful RTP File: A Faculty Center Workshop for RTP Candidates
Thursday, September 11, 2025: 10:00am-12:00pm at the Anatol Center [Register to Attend](#)
- Ideas for Equity in Department RTP Policies
Monday, September 15, 2025: 10:00am-12:00pm at the Anatol Center [Register to Attend](#)
- Interfolio Open Lab is scheduled for Tuesday, September 18, 2025: 10:00am-11:00am [Register to Attend](#)
- Avoiding Unintentional Bias: A Workshop for RTP Evaluators and Hiring Committees
Friday, September 19, 2025: 12:00pm-2:00pm via Zoom [Register to Attend](#)
Zoom Link: <https://csulb.zoom.us/j/83172611315> Meeting ID: 831 7261 1315