


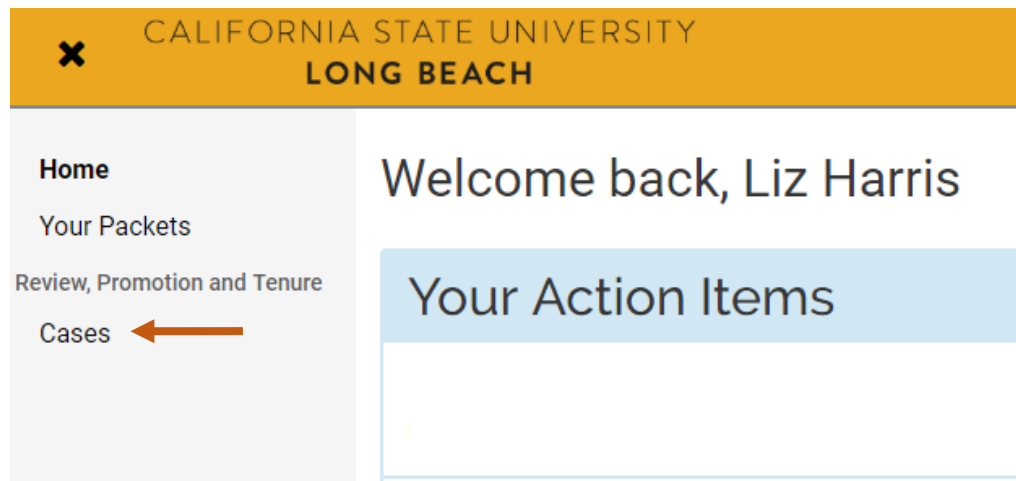
# EVALUATOR'S QUICK REFERENCE GUIDE TO INTERFOLIO

## How Do I Access Interfolio?

Interfolio is available via CSULB's Single Sign-On at <https://csulb.okta.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.



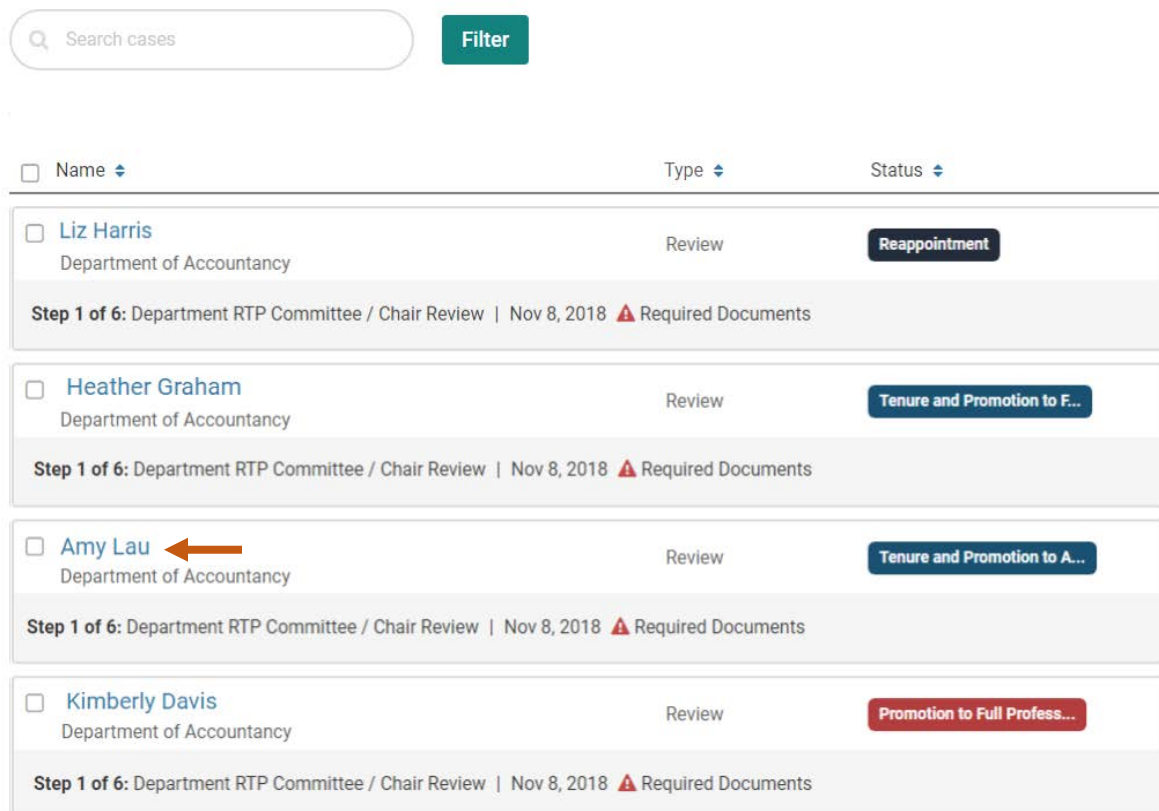
The screenshot shows the top navigation bar for California State University Long Beach. Below it is a sidebar menu with options: Home, Your Packets, Review, Promotion and Tenure, and Cases. An orange arrow points to the 'Cases' option. The main content area displays 'Welcome back, Liz Harris' and a section titled '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



The screenshot shows the 'Case List' interface. At the top, there is a search bar labeled 'Search cases' and a 'Filter' button. Below this is a table with columns for Name, Type, and Status. The table contains four rows of case information. An orange arrow points to the name 'Amy Lau' in the third row.

<input type="checkbox"/> Name	Type	Status
<input type="checkbox"/> Liz Harris Department of Accountancy	Review	Reappointment
Step 1 of 6: Department RTP Committee / Chair Review   Nov 8, 2018  Required Documents		
<input type="checkbox"/> 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		
<input type="checkbox"/> 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		
<input type="checkbox"/> 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.

California State University-Long Beach > Cases >  
**Amy Lau** Send Case **▼** Case Options **▼**

Unit: California State University-Long Beach | Template: CSULB Reappointment, Tenure, and Promotion (RTP) | Status: Tenure and Promotion to Associate Professor/Associate Librarian/SSP-AR II change

Case Materials | Case Details **1**

Search case materials by title  Q **Read Case**

Expand All  Collapse All Download Share Settings Move

**Candidate Packet**  
 Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

- > PRIMARY FILE Locked Unlock
- > INSTR - Course Materials Locked Unlock
- > INSTR - SPOT Summary Forms Locked Unlock

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.

**Amy Lau** Return to Case

Download  Search

Packet | Annotations

- > PRIMARY FILE
- > INSTR - COURSE MATERIALS
- ✓ INSTR - SPOT SUMMARY FORMS
  - SPOT Fall 2017
  - SPOT Spring 2016 ←
  - SPOT Spring 2017
  - SPOT Fall 2016
- > INSTR - ADDITIONAL INSTRUCTIONALLY RELATED ACTIVITY
- > SERVICE - DEPT/COLLEGE/UNIVERSITY
- > SERVICE - PROFESSION/COMMUNITY
- > RSCA - PEER REVIEWED
- > RSCA - WORKS IN PROGRESS
- > RSCA - ADDITIONAL
- > PRIOR EVALUATIONS
- > REQUEST - NON-CONSIDERATION FOR PROMOTION
- > OPEN PERIOD
- > DEPARTMENT RTP COMMITTEE EVALUATION

**CALIFORNIA STATE UNIVERSITY, LONG BEACH**  
 STUDENT PERCEPTIONS OF TEACHING (SPOT) SUMMARY  
 Spring 2016

Enrollment: 21  
 Name: \_\_\_\_\_

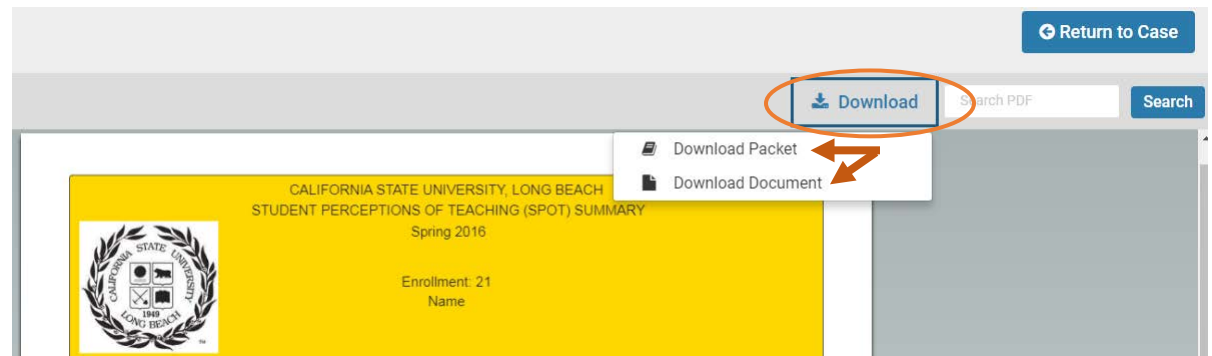
1.1 Class time was used efficiently.		Strongly Disagree <span style="float: right;">Strongly Agree</span>	Course n=17 av=5.06 md=6.00 dev=1.64	Department n=1059 av=5.43 md=6.00 dev=1.13	College n=10277 av=5.55 md=6.00 dev=0.95
1.2 Concepts were presented in a manner that helped me learn.		Strongly Disagree <span style="float: right;">Strongly Agree</span>	Course n=17 av=5.12 md=6.00 dev=1.65	Department n=1039 av=5.38 md=6.00 dev=1.12	College n=10251 av=5.52 md=6.00 dev=0.98
1.3 Assignments contributed to my learning.		Strongly Disagree <span style="float: right;">Strongly Agree</span>	Course n=16 av=5.44 md=6.00 dev=1.31	Department n=1050 av=5.50 md=6.00 dev=1.06	College n=10137 av=5.54 md=6.00 dev=0.97
1.4 The instructor responded respectfully to student questions and viewpoints.		Strongly Disagree <span style="float: right;">Strongly Agree</span>	Course n=16 av=5.06 md=5.50 dev=1.43	Department n=1038 av=5.53 md=6.00 dev=1.11	College n=10154 av=5.69 md=6.00 dev=0.86
1.5 The instructor was effective at teaching the subject matter in this course.		Strongly Disagree <span style="float: right;">Strongly Agree</span>	Course n=17 av=5.12 md=6.00 dev=1.50	Department n=1048 av=5.48 md=6.00 dev=1.10	College n=10282 av=5.61 md=6.00 dev=0.94
1.6 This instructor communicates well.		Strongly Disagree <span style="float: right;">Strongly Agree</span>	Course n=17 av=5.00 md=6.00 dev=1.50	Department n=1048 av=5.48 md=6.00 dev=1.10	College n=10275 av=5.60 md=6.00 dev=0.94

Previous Material < 1 / 1 > Next Material

# EVALUATOR'S QUICK REFERENCE GUIDE TO INTERFOLIO (continued)

## How Do I Download Case Materials?

Click  **Download** and select  Download Packet OR  Download Document .



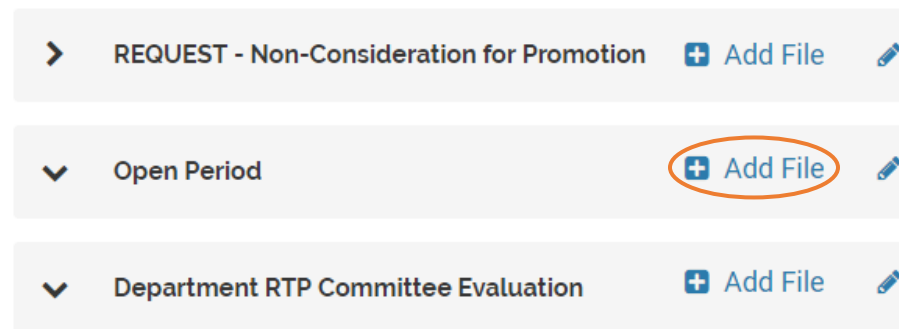
**Evaluation materials and recommendations are confidential.**

CSULB's Information Security Policies, Standards and Procedures are available [here](#) for your reference.

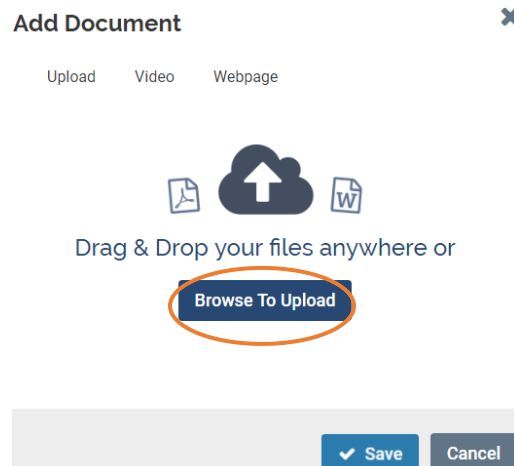
## How Do I Upload Open Period Materials to the Case?

**Dept Committee Chairs ONLY**

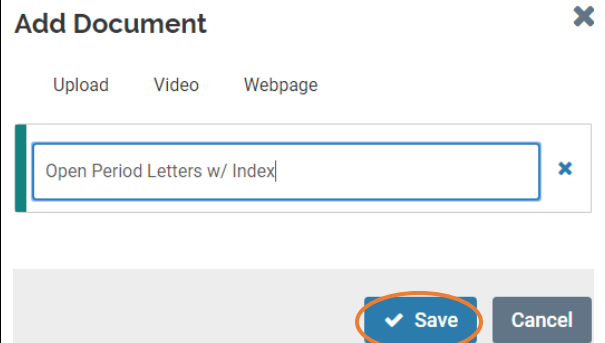
Scroll down to the **Open Period** section of the case and click  **Add File** .



Click **Browse To Upload** or use "Drag and Drop" to upload the Open Period materials with Index.



Click **Save** .



# EVALUATOR'S QUICK REFERENCE GUIDE TO INTERFOLIO (continued)

## 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 \*

ACCT RTP Committee Evaluation

Section \*

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 review.

Add Document

Upload Video Webpage

Drag & Drop your files anywhere or

Browse To Upload

✓ Save

Cancel

Click **✓ Save**.

Add Document

Upload Video Webpage

Dept Chair's Review

✓ Save

Cancel

# EVALUATOR'S QUICK REFERENCE GUIDE TO INTERFOLIO (continued)

## 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**

<input type="checkbox"/>	SIAM REVIEW	Sep 27, 2018 at 10:52 AM	
<input type="checkbox"/>	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

▼ **Candidate's Response(s) / Rebuttal(s)**

**Rebuttal To Dept Chair's Review** Nov 10, 2018 at 4:11 PM

▼ Provost's Decision

## 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.

The screenshot displays a list of evaluation sections in a dashboard. Each section is a light gray box with a downward arrow on the left, a title, a '+ Add File' button, and an edit icon. Below each section is a list of documents, each with a checkbox, a title, a document icon, and a timestamp. The 'College RTP Committee Evaluation' section is highlighted in yellow, and an orange arrow points to the 'CNSM RTP Committee Recommendation' document within that section.

Section	Document	Timestamp
Department RTP Committee Evaluation	MATH RTP Committee Recommendation	Nov 8, 2017 at 3:36 PM
Department Chair's Review (OPTIONAL)	Dept Chair's Review	Nov 8, 2017 at 5:04 PM
<b>College RTP Committee Evaluation</b>	<b>CNSM RTP Committee Recommendation</b>	Feb 10, 2018 at 5:57 PM
Dean's Review / Decision	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](mailto:help@interfolio.com) or (877) 997-8807. If you need further assistance, please contact Amy Lau in Faculty Affairs at [Amy.Lau@csulb.edu](mailto:Amy.Lau@csulb.edu) or 562.985.2624 or Liz Harris at [liz.harris@csulb.edu](mailto:liz.harris@csulb.edu) or 562.985.1764.