

Instructions for Completing, Sharing, and Forwarding DEPT. CHAIR RTP Reviews

The Department Chair is responsible for:

1. Completing the form in Interfolio
2. Sharing the report with the candidates
3. Forwarding the case to the next level

Please note: If you were part of the department committee, you still have to fill out the form, share the report with the candidate, and move the case forward. On the form, you will need to indicate that you were part of the committee, and you will not be writing a separate report.

A. Enter the case the same way you would to review the file.

The screenshot shows the Interfolio interface for a user named Joe Committee Manager. The page is titled "Welcome back, Joe Committee Manager". Under the heading "Your Action Items", there is a list item for "Business Test Candidate" with a red arrow pointing to it. Below this item, it says "Department of Economics & Statistics | Review | Performance Review (CBE) | Review, Promotion and Tenure". The left sidebar contains a navigation menu with "Home", "Review, Promotion and Tenure", and "Cases". The footer of the page includes "© 2018 Interfolio, Inc. Program Policies".

B. Click on "Case Details".

CAL STATE LA Joe Committee Manager

California State University-Los Angeles > Cases > **Business Test Candidate** [Send Case](#) [Case Options](#)

Unit: Department of Economics Status: Select Status Reviewing as: Department Peer Review Committee

[Case Materials](#) [Case Details](#) 1

[Read Case](#)

RTP Cover Sheet [Add File](#)

Please complete RTP Cover Sheet

[Cover Letter](#) Oct 3, 2018 at 12:57 PM

[RTP Cover Sheet \(Performance Review\) Form | 8 Questions](#) Candidate, Oct 8, 2018 at 3:45 PM

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C. Under required documents, you will see a place to fill out a form. Click on "Fill Out Form."

California State University-Los Angeles > Cases > **Test Candidate** [Send Case](#) [Case Options](#)

Unit: College of Arts & Letters Template: Performance Review (A&L) Status: Select Status

[Case Materials](#) [Case Details](#) 1

Reviewing as: Test [change](#)

Required Items 1 missing

All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Forms

Form Name	Assignee	Actions
Semester and One Year Appointments (Department Committee) 7 required questions	Committee Managers	Manage Respondents
Semester and One Year Appointments (Department Committee) 7 required questions	Violet Salcido (You)	Fill Out Form

[Committee Members \(2\)](#) [Email](#) [Edit](#)

Conversation (0) [Turn Off Comments](#)

No Comments Yet

[Add Comment](#)

Voting Results [Add New Votes](#)

- D. If you want to cut and paste from an existing document, you will have to use “CTRL + V” to paste it in the Interfolio form. You cannot paste tables.
- Please keep in mind that there is an 8000 character limit in each section and 10,000 overall. If you have more than 8000 characters in a section, you will need to contact Faculty Affairs. We will remove the form requirement and you will need to upload the document.
- E. After you finish completing the form, click on “Submit Form”.

The image shows a screenshot of a web form interface. At the top, there is a text input field titled "Currency in the field *". Below the title is a rich text editor toolbar with icons for undo, redo, bold (B), italic (I), strikethrough (I_x), bulleted list, numbered list, link, unlink, and a globe icon (Ω). The text area below the toolbar is empty. At the bottom right of this field, it says "0 / 8000 characters".

Below the first field is another text input field titled "Peer Evaluation Committee Names *". It has the same rich text editor toolbar and an empty text area. At the bottom right of this field, it says "0 / 8000 characters".

At the bottom of the form, there are three buttons: "Submit Form" (a dark blue button with white text), "Save Responses" (a light blue button with dark blue text), and "Cancel" (a red text link). A red arrow points to the "Submit Form" button.

- F. After submitting the form, you will see “Edit Submission”. That means that you have completed the form, but you can still change your responses, as long as you have not moved the case forward or shared it with the candidate.

California State University-Los Angeles > Cases >

Test Candidate

[Send Case](#) [Case Options](#)

Unit
Division of Curriculum & Instruction

Template
Performance Review (CCOE)

Status
[Select Status](#)


[Case Materials](#) [Case Details](#)

Reviewing as
test [change](#)

Required Items

All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Forms

Form Name	Assignee	Actions
Semester and One Year Appointments (Department Committee) 6 required questions	Committee Managers	Manage Respondents
Semester and One Year Appointments (Department Committee) 6 required questions	Violet Salcido (You)	Edit Submission 

[Committee Members \(2\)](#) [Email](#) [Edit](#)

Conversation (0) [Turn Off Comments](#)

No Comments Yet

[Add Comment](#)

Voting Results [Add New Votes](#)

- G. **IMPORTANT:** Click on “Case Materials” near the top-left of the page.

California State University-Los Angeles > Cases >

Test Candidate

[Send Case](#) [Case Options](#)

Unit
Division of Curriculum & Instruction

Template
Performance Review (CCOE)

Status
[Select Status](#)

[Case Materials](#) [Case Details](#)

Reviewing as
test [change](#)

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Semester and One Year Appointments (Department Committee) 6 required questions	Committee Managers	Manage Respondents
Semester and One Year Appointments (Department Committee) 6 required questions	Violet Salcido (You)	Edit Submission

[Committee Members \(2\)](#) [Email](#) [Edit](#)

Conversation (0) [Turn Off Comments](#)

No Comments Yet

[Add Comment](#)

Voting Results [Add New Votes](#)

H. **NEXT**, SCROLL DOWN to “(Periodic Evaluation or Performance Review) Report Submission (All Levels)” and **CHECK THE BOX NEXT TO THE DOCUMENT TITLE.**

CAL STATE LA

Joe Committee Manager

Working Personnel Action File (WPAP) Documents

1. All previous written evaluations at every level for each performance review and periodic evaluation.

Performance Review Report Submission (All Levels) [Add File](#)

The report must be signed by all reviewers prior to submission.
You may obtain the current review template from the Dean's office.

TEST DOC: Dept written review [Add File](#) Oct 11, 2018 at 11:53 AM

Response / Rebuttal [Add File](#)

The faculty member may submit a rebuttal statement or response in writing and/or request a meeting be held to discuss the report within ten (10) days following receipt of the evaluation report. Evaluation reports from all levels of review and any rebuttals or responses shall be placed in the faculty member's personnel action file (via the eWPAP).

- I. **Click on the box next to the file name. Please make sure that the report has finished uploading and it does not say pending. It should not take more than 2 minutes to load. Refreshing the page sometimes helps.**
 - Click on “Share,” and when the pull-down menu opens, select “With Candidate.”

The screenshot shows the CAL STATE LA interface. At the top, there is a navigation bar with 'Expand All', 'Collapse All', 'Share', 'Settings', and 'Move' buttons. Below this, a dropdown menu is open under 'Share', showing options 'With Candidate' and 'With Committee Members'. A red arrow points to the 'Share' button, and another red arrow points to the 'With Candidate' option. In the main content area, there is a section titled 'Periodic Evaluation Report Submission (All Levels)'. Below this, there is a 'Materials' table with the following content:

Title	Details	Actions
<input checked="" type="checkbox"/> TEST	Added by Nov 10, 2020	Edit

A red arrow points to the checkbox next to the file name 'TEST'. At the bottom of the page, there is a footer with '© 2020 Interfolio, Inc. Program Policies'.

- J. **If you were part of the committee and are not writing a separate report, skip #3-6.**
 1. In the Subject line box, type:

“Your Department Chair Review”
 2. In the Message Box type one of the messages below:
 - “Please see your review document. You have 10 days (after the committee deadline as posted on the University RTP Calendar, <http://www.calstatela.edu/FacultyAffairs/current-calendars>) to provide an optional response or rebuttal to this review. A response or rebuttal is not required.”
 - **If you are not writing a separate report, please type** “Please see your review document.”
 3. In the grey box on the right, click “**Enable.**” **If you do not see the enable box, you did not click on the box next to the file name and there is nothing attached, or the file is still pending.**
 - The attachment appears below the message. If there is nothing there, no file is attached.

Subject *
Your Department RTP Committee Review

Message *

Please review your review document. You have 10 days (after the committee deadline as posted on the University RTP Calendar, <http://www.calstatela.edu/FacultyAffairs/current-calendars>) to provide an optional response or rebuttal to this review. A response or rebuttal is not required.

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

Performance Review (Department Committee)

Direct email reply:
vsalcido@cslanet.calstatela.edu

File Response:
 Enable
When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

Message Reason
Response/Rebuttal

Deadline
Nov 15, 2021

Section for Response *
Response / Rebuttal

Preview Send Cancel

4. In Message Reason, type “Response/Rebuttal.”

5. For “Deadline,” use the correct Optional Rebuttal Deadline from the [RTP Calendar](#).

6. From the pull down menu on the bottom-right side, select: “Response/Rebuttal”

1

Message to Candidate
Business Test Candidate (businesstestcandidate@interfolio.com)

Subject *
Message Subject

Message *

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

TEST DOC: Dept written review

3

4

5

6

Details

Direct email reply:
testcommitteemanager@intf.com

File Response:
 Enable
When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

Message Reason
e.g. rebuttal, reminder

Deadline
MMM d, yyyy

Section for Response *
Response / Rebuttal

Preview Send Cancel

K. Click “Send.”

L. After sharing the evaluation with the candidate, send the case forward to the next level.

1. At the top of the page, click “Send Case”.

2. Click "Forward to Administrative Check".

Candidate Profile: Test Candid... X

https://rpt.interfolio.com/10218/cases/91820

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CAL STATE LA
CALIFORNIA STATE UNIVERSITY, LOS ANGELES

Violet Salcido

Home
Your Packets
Review, Promotion and Tenure
Cases
Templates
Administration
Reports
Users & Groups

California State University-Los Angeles > Cases >
Test Candidate

Unit: College of Arts & Letters
Template: Performance Review (CAL)

Case Materials Case Details 1

Search case materials by title
[Search Box] [Read Case]

Expand All Collapse All [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.

▼ RTP Cover Sheet **Unlocked** [Lock]

Please complete RTP Cover Sheet

Additional Documents optional [Add File]

No files have been submitted.

RTP Cover Sheet (Performance Review) Form | No responses Not Yet Submitted

► Curriculum Vita (CV) **Unlocked** [Lock]

- M. Uncheck the box that says "Send a message to the reviewers gaining access to the case" and click "Continue".

Send Case Forward [Close]

Great job! You're sending the case forward to the next step, Administrative Check. The following reviewers will lose access to the case:

Department Peer Review Committee | 1 members

The following reviewers will gain access to the case:

Administrative Check | 1 members

Send a message to the reviewers gaining access.
If recipients respond to this message, their response will come directly to your email inbox.

[Continue] [Cancel]