

Instructions for Completing, Sharing, and Forwarding DEAN RTP Performance Reviews

The Dean is the person designated in Interfolio as the manager at your level of review. You are responsible for:

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

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

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Program Policies

B. Click on “Case Details”.

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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”.

Currency in the field *

Rich text editor toolbar: Undo, Redo, Bold (B), Italic (I), Underline (I_x), Bulleted List, Numbered List, Indent Left, Indent Right, Link, Unlink, and Insert Link (Ω).


0 / 8000 characters

Peer Evaluation Committee Names *

Rich text editor toolbar: Undo, Redo, Bold (B), Italic (I), Underline (I_x), Bulleted List, Numbered List, Indent Left, Indent Right, Link, Unlink, and Insert Link (Ω).

0 / 8000 characters

Submit Form **Save Responses** **Cancel**



- 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.

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

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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](#)

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Required Items

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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](#)

H. **NEXT**, SCROLL DOWN to “(Performance Review or Periodic Evaluation) 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)

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 Oct 11, 2018 at 11:53 AM

Response / Rebuttal

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 section titled 'Periodic Evaluation Report Submission (All Levels)' contains instructions and a 'Materials' table. The table has columns for 'Title', 'Details', and 'Actions'. A row in the table shows a file named 'TEST' with a checkbox to its left. A red arrow points to this checkbox. Another red arrow points to the 'Share' button in the top right, and a third red arrow points to the 'With Candidate' option in the share dropdown menu that appears below it. The footer includes '© 2020 Interfolio, Inc.' and 'Program Policies'.

- J. 1. In the Subject line box, type:

“Your Dean’s Review.”

2. In the Message Box type:

“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.”

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".

The screenshot shows the Interfolio interface for a 'Test Candidate' case. At the top right, the 'Send Case' button is circled in red with a '1' and an arrow pointing to it. A dropdown menu is open below it, and the option 'Forward to Administrative Check' is highlighted with a red box and a '2' and an arrow pointing to it. The page title is 'Test Candidate' and the unit is 'College of Arts & Letters'. The template is 'Performance Review (CAL)'. The candidate packet is visible, showing 'RTP Cover Sheet' (Unlocked) and 'Curriculum Vita (CV)' (Unlocked).

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

The 'Send Case Forward' dialog box is shown. It has a close button (X) in the top right corner. The text reads: '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'. Below this, it says: 'The following reviewers will gain access to the case: Administrative Check | 1 members'. At the bottom left, there is a checkbox labeled 'Send a message to the reviewers gaining access.' which is unchecked and highlighted with a red arrow. Below the checkbox, it says: 'If recipients respond to this message, their response will come directly to your email inbox.' At the bottom right, there are two buttons: 'Continue' (highlighted with a red arrow) and 'Cancel'.