

Instructions for Completing, Sharing, and Forwarding DEAN RTP Periodic/Lecturer 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.

Home
Review, Promotion and Tenure
Cases

WELCOME back, Joe Committee Manager

Your Action Items

Business Test Candidate
Department of Economics & Statistics | Review | Performance Review (CBE) | Review, Promotion and Tenure

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Program Policies

B. Click on “Case Details”.

Home
Review, Promotion and Tenure
Cases

California State University-Los Angeles > Cases >
Business Test Candidate

Unit
Department of Economics & Statistics

Status
Select Status

Reviewing as
Department Peer Review Committee

Send Case Case Options

Case Materials Case Details 1

Search Case Materials Read Case

RTP Cover Sheet
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 screenshot shows a web form with two text input fields. The first field is titled "Currency in the field *" and the second is titled "Peer Evaluation Committee Names *". Both fields have a rich text editor toolbar at the top with icons for undo, redo, bold, italic, underline, bulleted list, numbered list, link, unlink, and a link icon. Below each field is a character count: "0 / 8000 characters". At the bottom of the form, there are three buttons: "Submit Form" (highlighted with a red arrow), "Save Responses", and "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

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](#)

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) [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 [Download](#) 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.

Click on "Share," and when the pull down menu opens, select "With Candidate."

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

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

A red arrow points to the checkbox next to 'TEST'. Below the table, there is a section titled 'Response / Rebuttal' with 'Edit' and 'Add File' buttons. At the bottom left, there is a copyright notice: '© 2020 Interfolio, Inc. 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.calstateela.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:
testcommittee@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, since the Dean is the last step, you do not need to send the case forward. The case will be closed after the rebuttal period.