

Instructions for Completing, Sharing, and Forwarding DEPT. COMMITTEE/COLLEGE COMMITTEE RTP Reviews

The Chair of the committee is the person designated in Interfolio as the committee manager. The 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 the department chair was part of the department committee, they still have to fill out the form, share the report with the candidate, and move the case forward. On the form, they will need to indicate that they were part of the committee, and they will not be writing a separate report.

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

The screenshot displays the Interfolio web application interface. At the top, there is a navigation bar with the Cal State LA logo on the left and the user name 'Joe Committee Manager' on the right. Below the navigation bar, a sidebar on the left contains the following menu items: 'Home', 'Review, Promotion and Tenure', and 'Cases'. The main content area features a 'Welcome back, Joe Committee Manager' message. Below this, there is a 'Your Action Items' section with a light blue header. A card is visible in this section with the title 'Business Test Candidate' and the subtitle 'Department of Economics & Statistics | Review | Performance Review (CBE) | Review, Promotion and Tenure'. A red arrow points to the card. At the bottom of the page, there is a footer with an information icon, the text '© 2018 Interfolio, Inc.', and a link for 'Program Policies'.

B. Click on "Case Details".

CAL STATE LA Joe Committee Manager

Home California State University-Los Angeles > Cases >

Business Test Candidate

Unit: Department of Economics Status: Select Status Send Case Case Options

Reviewing as: Department Peer Review Committee

Case Materials Case Details 1

Search Case Materials

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

Unit: College of Arts & Letters Template: Performance Review (A&L) Send Case Case Options

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 \(2\)](#)

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

No Comments Yet

Voting Results

- 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 displays a web form interface 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, strikethrough, 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.

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](#)

The committee is able to see the form after it has been submitted as long as the case has not been moved forward.

- 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

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](#)

H. **NEXT**, SCROLL DOWN to “Performance or Periodic 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](#)

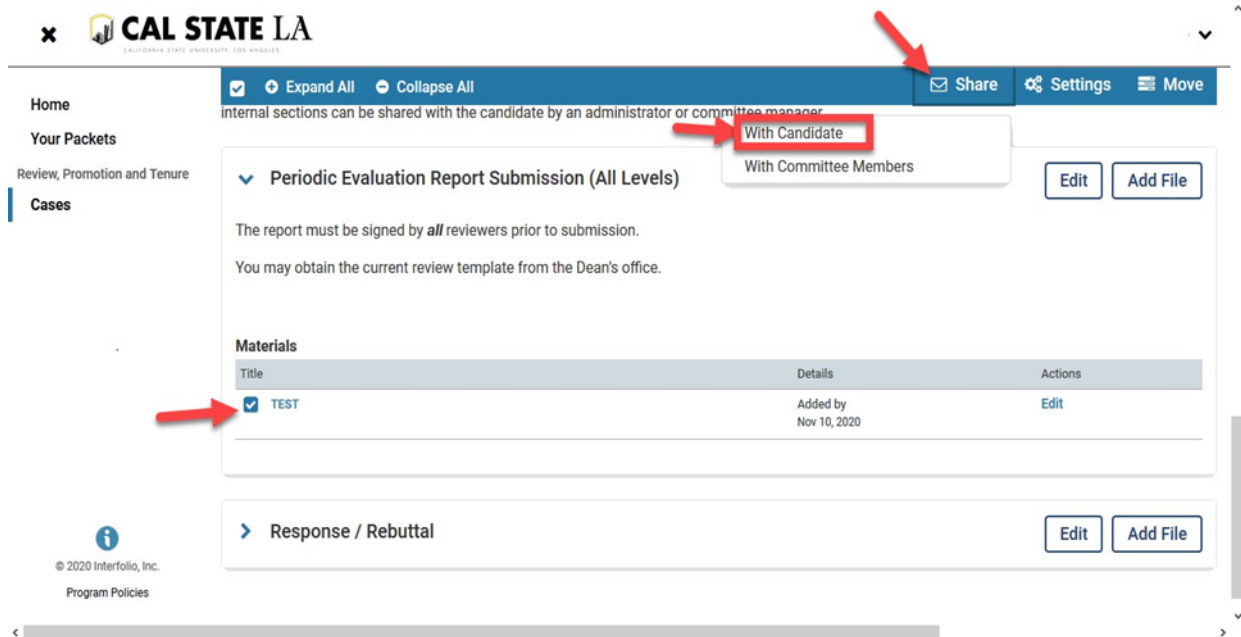
The report must be signed by all reviewers prior to submission.
You may obtain the current review template from the Dean's office.

TEST DOC: Dept written review 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.”



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

“Your [INSERT APPROPRIATE LEVEL] Review.” (Appropriate levels include Dept. RTP Committee, College RTP Committee).

2. In the Message Box type:

“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.”

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:
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, send the case forward to the next level.
1. At the top of the page, click "Send Case".
 2. Click "Forward to Administrative Check".

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

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

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