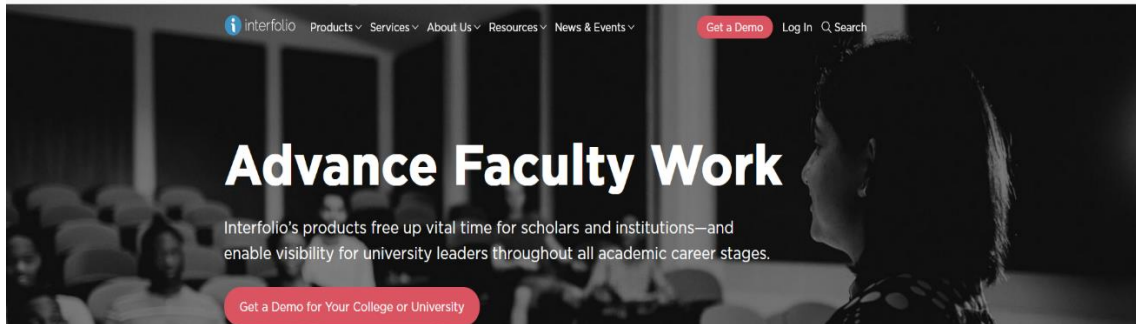


Counselor Faculty Periodic Review Interfolio Instructions

Instructions for Accessing Interfolio

It is recommended that you use Google Chrome, Firefox, or Safari (Mac) as your browser when accessing the Interfolio website.

1. Go to www.Interfolio.com Click LOG IN
2. Click on Partner Institution
3. Type California State University, Los Angeles on the drop-down menu. (If you start with “Los” it should auto find the correct campus.) Click SIGN IN.
4. Sign in using your campus email and password.
5. Click on the Cal State LA logo.
6. If your case is ready, it will be under: “Your Action Items.”

A screenshot of the Interfolio 'Sign In' page. The page has a dark blue header with the Interfolio logo. The main content area is white. Under the heading 'Sign In', there are two sections: 'Sign in with email' and 'Other Sign In Options'. The 'Sign in with email' section contains two input fields: 'Email *' with the placeholder 'Enter Email' and 'Password *' with the placeholder 'Enter Password'. Below these fields is a blue 'Sign In' button. The 'Other Sign In Options' section contains two buttons: 'Sign in with Partner Institution' (highlighted with a red arrow) and 'Sign in with Google'. Below the sign-in options is a link for 'Forgot your password?'. At the bottom, there is a section titled 'Don't have an account?' with the text 'Use Interfolio's suites of services to simplify your academic life.' and a link to 'Create an account'.

Sign in through your institution

If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.

[Sign in with an Interfolio account >](#)

Don't have an account? Sign up now.
Use Interfolio's suite of services to simplify your academic life.



Sign in

[Can't access your account?](#)

Enter password

[Forgot my password](#)

Interfolio Instructions

Counselor Faculty Instructions (CAPS)

Preparing Your Documents for the Working Personnel Action File (WPAF)

The Student Health Center will upload these items from your Permanent Personnel Action File (PPAF):

- Student Satisfaction Survey Results
- Peer Observations
- Previous Evaluations (all levels) and any Responses/Rebuttals

You will need to prepare the following for upload:

- An updated CV

(It is highly recommended that you organize your CV in the order of the main categories of evaluation:)

- Counseling Performance
 - Currency in the Field (which can include trainings, workshops, CETL activities, professional achievements, or service to the University)
 - Valid Licensure
- Narrative Statement: Describing your Counseling Performance and Currency in the Field
 - Index of Materials (a simple outline listing of materials uploaded for easy reference for reviewers)

Instructions on how to Upload Materials

Please Note: Do not make your PDF into a Portfolio PDF. Portfolio PDFs are not visible to the committees.

Naming Conventions and Uploading Files – WPAF (Interfolio)

1. All files are converted in PDF format upon upload. It is not necessary to convert MS Word files or other file types to PDFs format prior to upload. (PDF Portfolios cannot be accessed by reviewers in Interfolio.)
2. All files uploaded into Interfolio must use basic naming conventions designed to assist reviewers with identifying files.
3. Student Satisfaction Surveys and Peer Observations uploaded by the Student Health Center will use the following naming conventions (see examples). Please do not alter.
SSS_LASTNAME_2022-2023
PEEROBS_LASTNAME_2022-2023
4. Files that you upload will begin with the initial semester of inclusion, except for your CV and Narrative Statement. Your CV and Narrative Statement should have the current term.
Examples:
SP24CV (current term and descriptor)
SP24_Narrative Statement (current term and descriptor)
Workshops_2022-2023 (as an example of a supplemental file; supplemental files can be combined and uploaded into one file instead of individual files)
5. To upload files under each required section, click on “Edit”

California State University-Los Angeles > Your Packets >

View Instructions Preview Packet

Unit	Type	Packet Deadline Type	Packet Due Date
College of Business & Economics	Review	Soft Deadline	

Overview Packet

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward your packet. [To learn more, read the Candidate's Packet Guide.](#)

RTP Cover Sheet
Not Yet Submitted Unlocked

Type	# Required	# Added
RTP Cover Sheet (Periodic Evaluation for Probationary Faculty)	3 required	0

Edit

Curriculum Vita (CV)
Not Yet Submitted Unlocked

Type	# Required	# Added
CV	1 required	0

Edit

6. Click on “Fill Out Form” for the RTP Cover Sheet. After you enter the information, click on “Submit”

View Instructions Preview Packet

Unit	Type	Packet Deadline Type	Packet Due Date
College of Business & Economics	Review	Soft Deadline	

Overview Packet

Expand All Collapse All

RTP Cover Sheet
 Not Yet Submitted Unlocked
2. Submit 0 of 0 Required Files

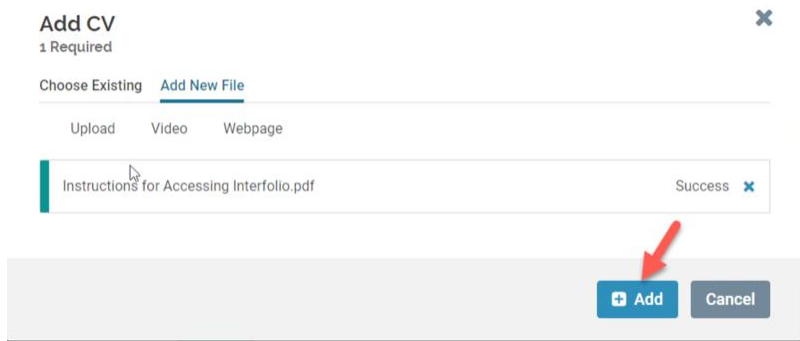
Please complete RTP Cover Sheet

RTP Cover Sheet (Periodic Evaluation for Probationary Faculty) 3 required questions, 1. Fill Out Form

This form has not been completed.

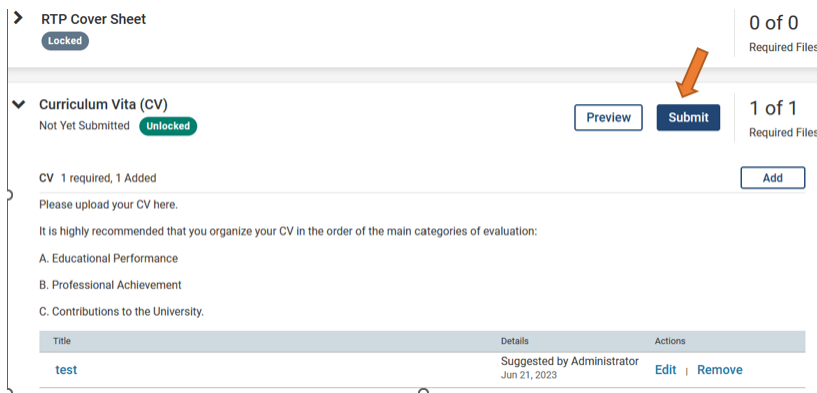
7. Click on “Add” for all other sections required.

9. After you upload your files, or choose from existing files, click on “Add”.

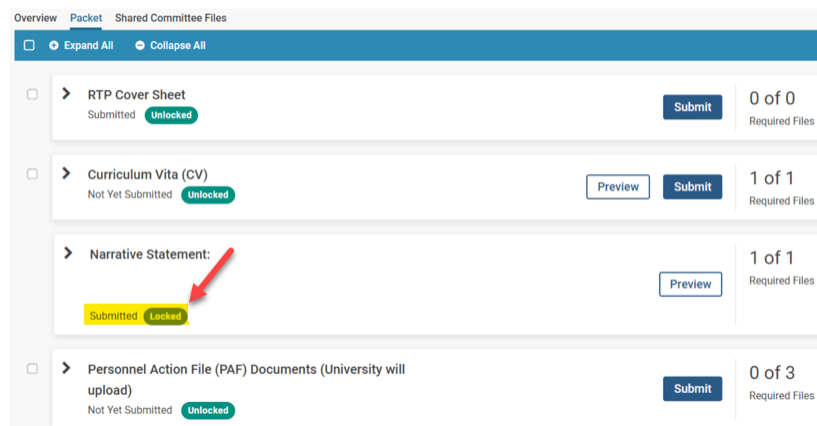


10. After uploading all required files, click “Submit” for all sections.

- Please keep in mind that once you click submit for a section, you will not be able to edit that section anymore. If you need to edit a submitted section and it is still before the deadline, please contact Faculty Affairs.

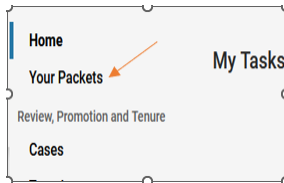


11. You will not receive an email confirmation from Interfolio that your file has been submitted. You can verify that each section has been submitted when you see that it is locked. Please make sure that all sections have been submitted and locked.

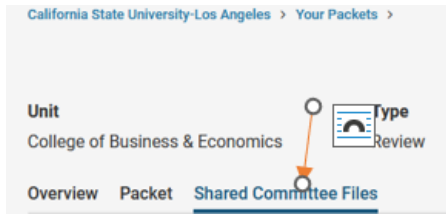


How to View/Download a Report, and Submit a Response/Rebuttal

1. Click on "Your Packets" in the left-hand navigation and select the case



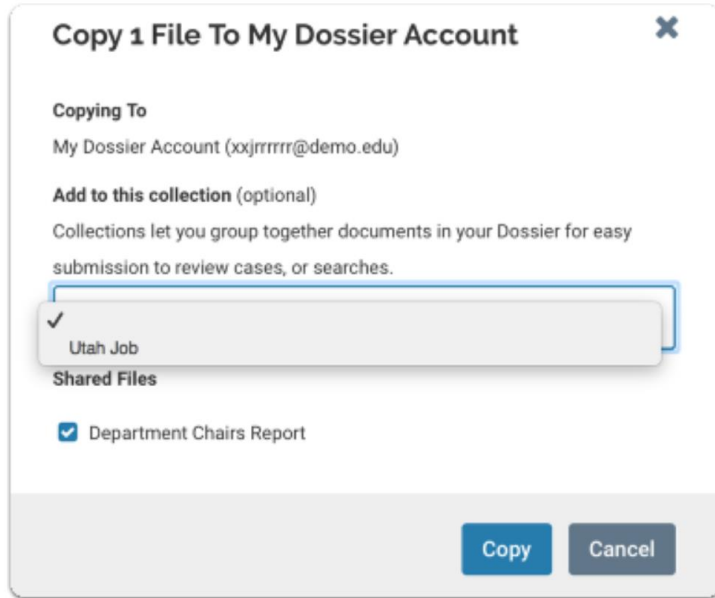
2. Open the "Shared Committee Files" tab of the case packet



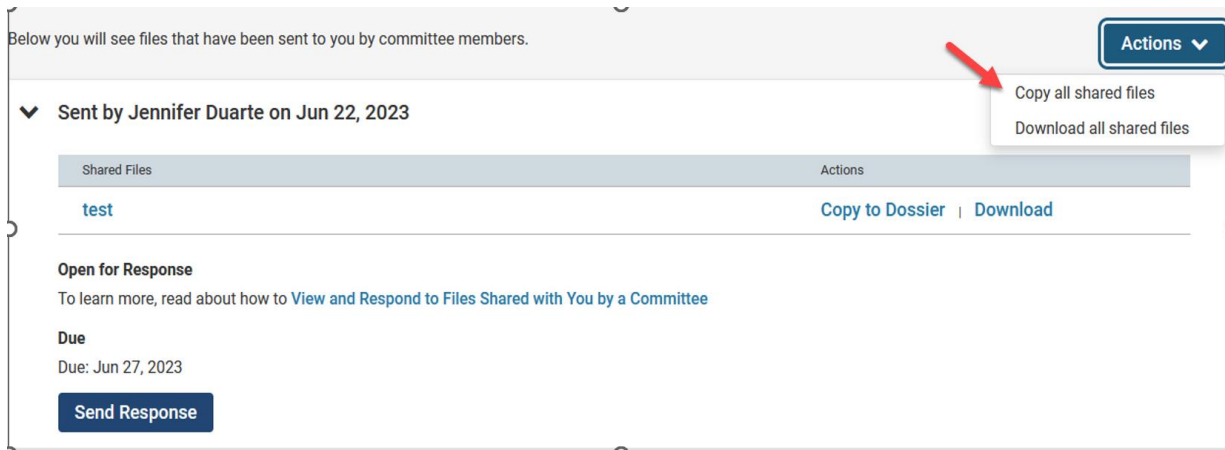
3. Files shared with you will appear listed. You can download the file or copy it to your Dossier, where it will appear in your Dossier materials.



If you click "Copy to Dossier," you will have the option to add the file directly to a collection of materials (if you have any collections available).



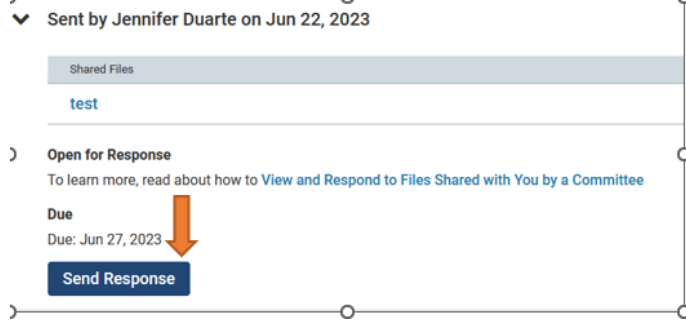
You can also click the "Actions" button to the right of the page to copy or download all shared files.



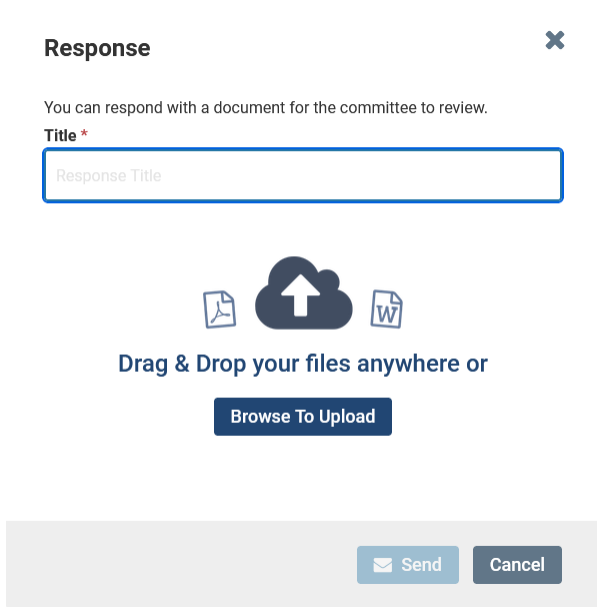
4. Click "Send Response" to respond to the file

If you are allowed to respond to the file's content, you will see a link labeled "Send Response," and a due date for when your response is due.

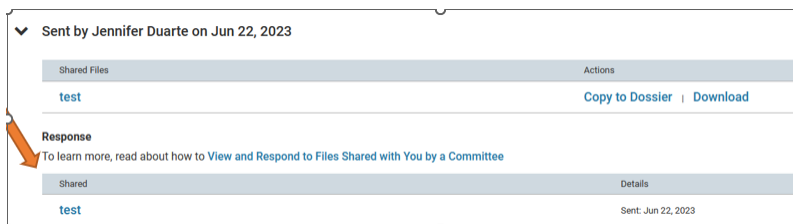
Please Note: This is a hard deadline, and you must respond to shared files by the due date.



5. Give your response a title and upload the document file

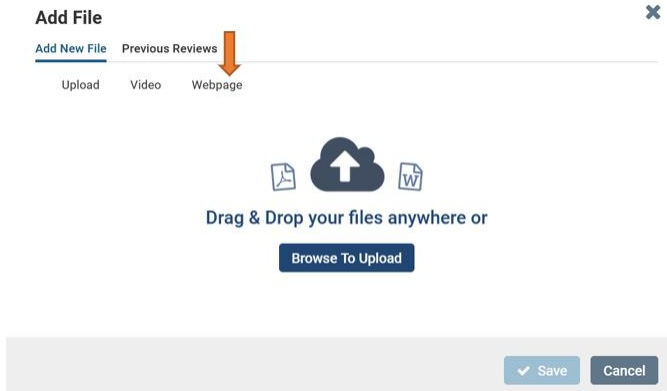


6. Your response will appear in the list of shared files

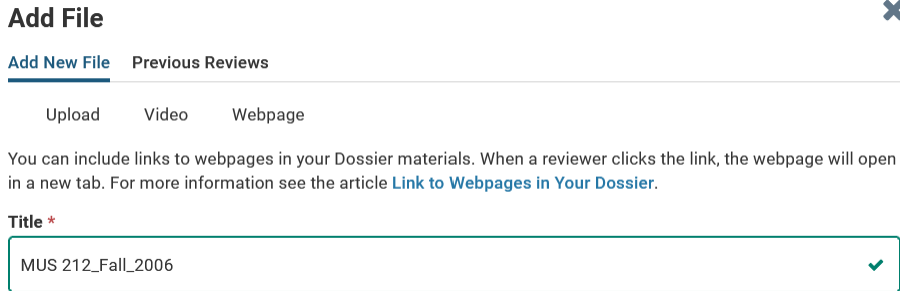


How to add a link or webpage

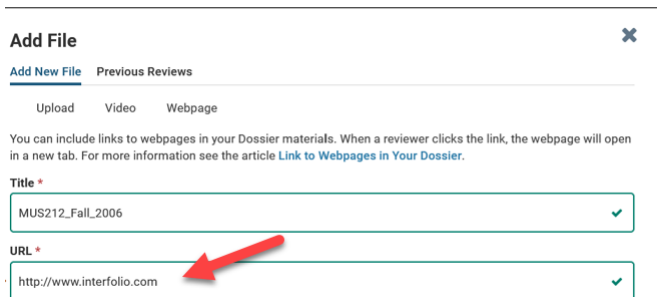
1. Open the webpage tab of the "Add File" window.



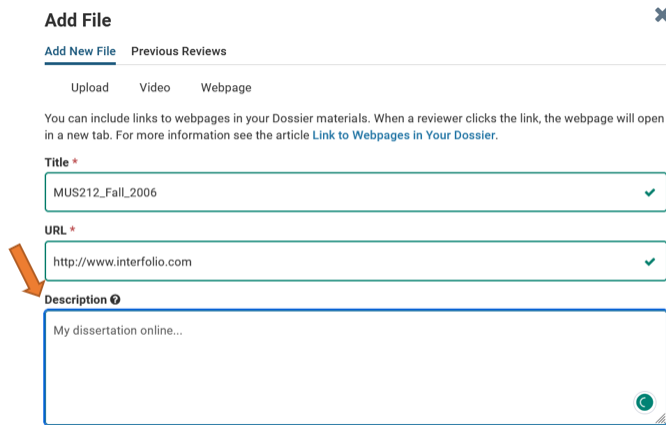
2. Give your webpage a title



3. Enter the URL of the webpage



4. Enter a description to provide information or context for your webpage.



Add File ✕

[Add New File](#) [Previous Reviews](#)

Upload Video **Webpage**

You can include links to webpages in your Dossier materials. When a reviewer clicks the link, the webpage will open in a new tab. For more information see the article [Link to Webpages in Your Dossier](#).

Title *

MUS212_Fall_2006 ✓

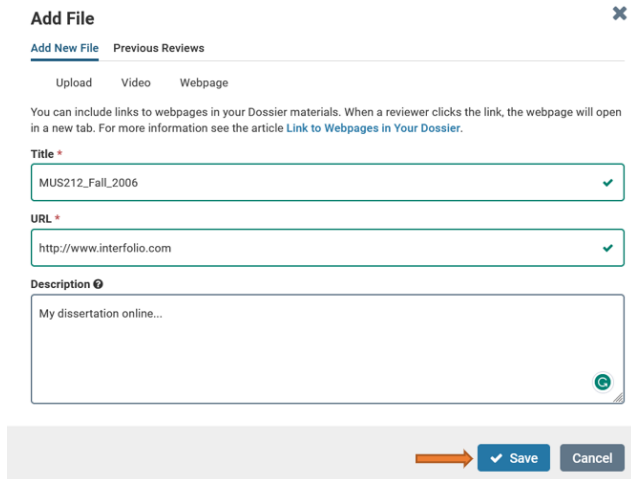
URL *

http://www.interfolio.com ✓

Description ⓘ

My dissertation online...

5. Click “Save,” and the link to your webpage will be added to the list of materials in your Dossier.



Add File ✕

[Add New File](#) [Previous Reviews](#)

Upload Video **Webpage**

You can include links to webpages in your Dossier materials. When a reviewer clicks the link, the webpage will open in a new tab. For more information see the article [Link to Webpages in Your Dossier](#).

Title *

MUS212_Fall_2006 ✓

URL *

http://www.interfolio.com ✓

Description ⓘ

My dissertation online...

✓ Save Cancel

If after referring to these instructions you find that you are still having trouble, please contact the Office of Faculty Affairs between 8:00 – 5:00 Monday through Friday at 323-343-3810 or email us at RTP_Interfolio_Help@calstatela.edu. We are here to help.