

Help for Review, Promotion, and Tenure Candidates

A Candidate's Guide to Interfolio Review, Promotion, and Tenure

We have created a secure, user-friendly interface that allows candidates to quickly and easily assemble a packet of materials for their review and submit these materials online.

This article explains what to expect as the candidate of a review conducted using Interfolio's Review, Promotion & Tenure service.

 You can generate a PDF and print this article from the sidebar to the left of this page.

In this Article:

- [How do I activate my candidate account? What does the notification email look like?](#)
- [How to view past packets](#)
- [How to view packet requirements](#)
- [How to add files to your packet](#)
- [How to preview your packet before submitting](#)
- [How to view files that are shared with you by the committee in RPT](#)
- [How to respond to shared files](#)

If your institution uses Interfolio Review, Promotion, & Tenure to conduct reviews online, you will be asked to submit a packet of review materials through Interfolio.

Before you begin, an administrator will create a case for you that includes instructions for submitting your packet with all the required documents and forms.

You should be notified that your case is ready via email.

Select “View Case” in the notification email

When you select “View Case” in this email you will be prompted to create a password that generates the Interfolio account you will use to collect and submit materials for your packet.

If you already have an Interfolio account, the "View Case" button will take you to your account dashboard.



Demo University has initiated a review on your behalf.


[VIEW CASE](#)

Viewing your case will allow you to view requirements, read instructions, and submit your packet online.

Your promotion review will begin Monday, January 23rd. Please log in to your Interfolio account and follow the instructions...

Powered by [Interfolio](#) | [Support](#)

Activate your account

 You may need to enter a password to activate your Interfolio account.

Enter a password, accept our Terms of Service and click to activate your account

Activate Account

Your account is almost ready! Please enter a password to finish activating your account.

Email Address
mbrownie@mailinator.com

First Name *

Michael

Last Name *

Brown

Password *

Show Password

Password is required.

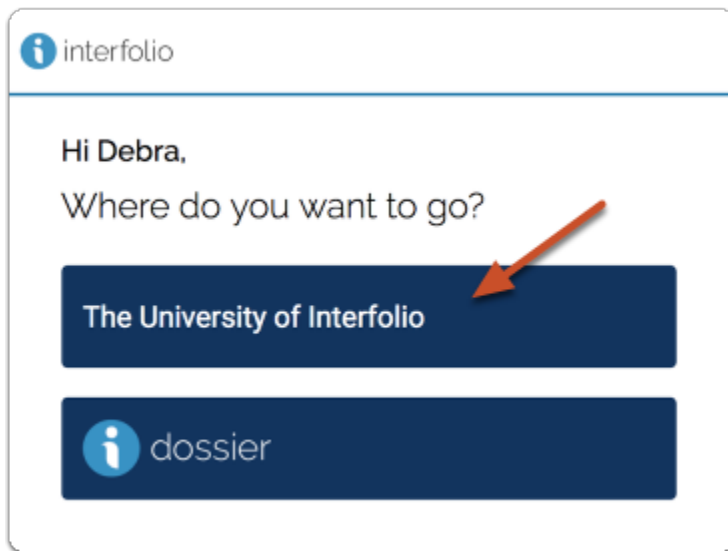
I agree to Interfolio's [Terms of Service](#).

[Activate Account](#)

View your packet instructions and requirements:

Select your institutional account

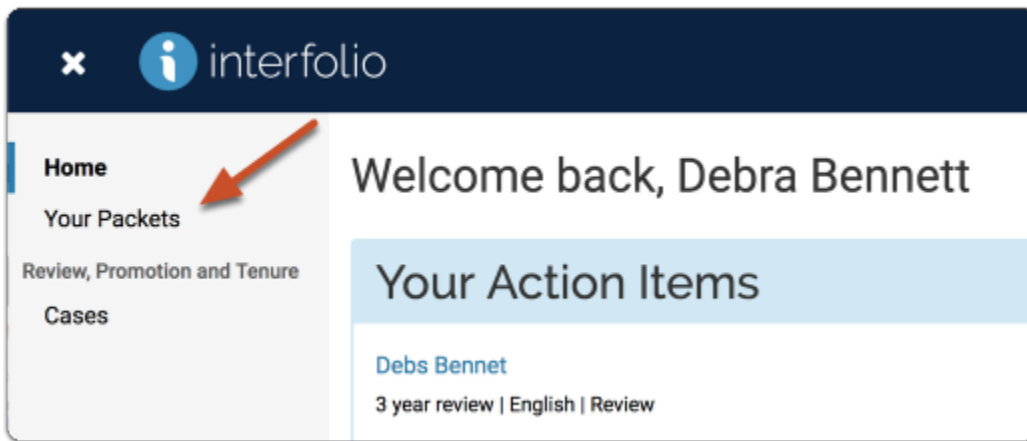
You will have both an institutional account and a personal Dossier account. Select to your institutional account when prompted.




Click the link to "Your Packets" from the navigation bar, or use the link in your homepage action items

Not seeing it?

If you do not see this in your navigation bar, you might be on the Dossier page, switch accounts using the account menu at the top right of the page.



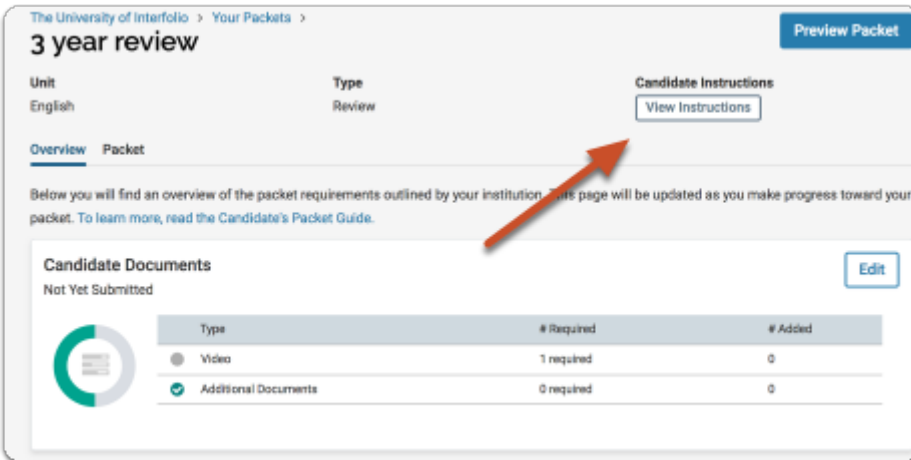
Select the packet you want to work on

 **Tip:** You can view past packets in the section below the Active Packets

Your Packets				
Active				
Packet	Type	Status	Due Date	
English Department 3rd Year Review (Tenure Track)	Review	Not Submitted	-	View
English Department Tenure Review	Tenure	Not Submitted	-	View
Completed				
Packet	Type	Responded	Completed	
Farragut Square State University		-	Jun 20, 2016	View
Farragut Square State University 3rd Year Review (Tenure Track)	Review	-	Aug 16, 2017	View
School of Business Tenure Review	Tenure	-	Aug 30, 2017	View

You will see an "Overview" page listing the required materials and forms you will need to add to your packet.

Click "View Instructions" to read instructions provided by your institution for assembling and submitting your packet



The University of Interfolio > Your Packets > **3 year review** Preview Packet

Unit	Type	Candidate Instructions
English	Review	View Instructions

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](#).

Candidate Documents Edit

Not Yet Submitted

Type	# Required	# Added
<input type="radio"/> Video	1 required	0
<input checked="" type="checkbox"/> Additional Documents	0 required	0

Your packet will likely be divided into sections, each with a list of materials you will need to upload in order to complete each section.

If a due date has been set, you will also see the due date for each section. Each section of the packet can be submitted once all requirements for the section have been met.

! Note that individual packet sections can have unique due dates.

Candidate Documents Edit

Submitted

Type	# Required	# Added
<input type="radio"/> CV	1 required	1
<input type="radio"/> Cover Letter	1 required	1
<input type="radio"/> Research Statement	1 required	1
<input checked="" type="checkbox"/> Additional Documents	0 required	6
<input checked="" type="checkbox"/> Tenure Application Form Part II	1 required	1

Evidence of Teaching Excellence Edit

Due: 2016-05-26 | Submitted

Type	# Required	# Added
<input type="radio"/> Peer Observer's Reports	3 required	1
<input checked="" type="checkbox"/> Statement of Teaching Philosophy	0 required	1
<input checked="" type="checkbox"/> Additional Documents	0 required	0
<input checked="" type="checkbox"/> Table of Courses Taught	1 required	1

If enabled by an administrator, you may also be able to add sections to your packet. If this feature is enabled, when you open the "Packet" tab, you will see an "Add Section" button.

Demo University > Your Packets >

Music Promotion Cases

Unit: Ethnomusicology Type: Promotion

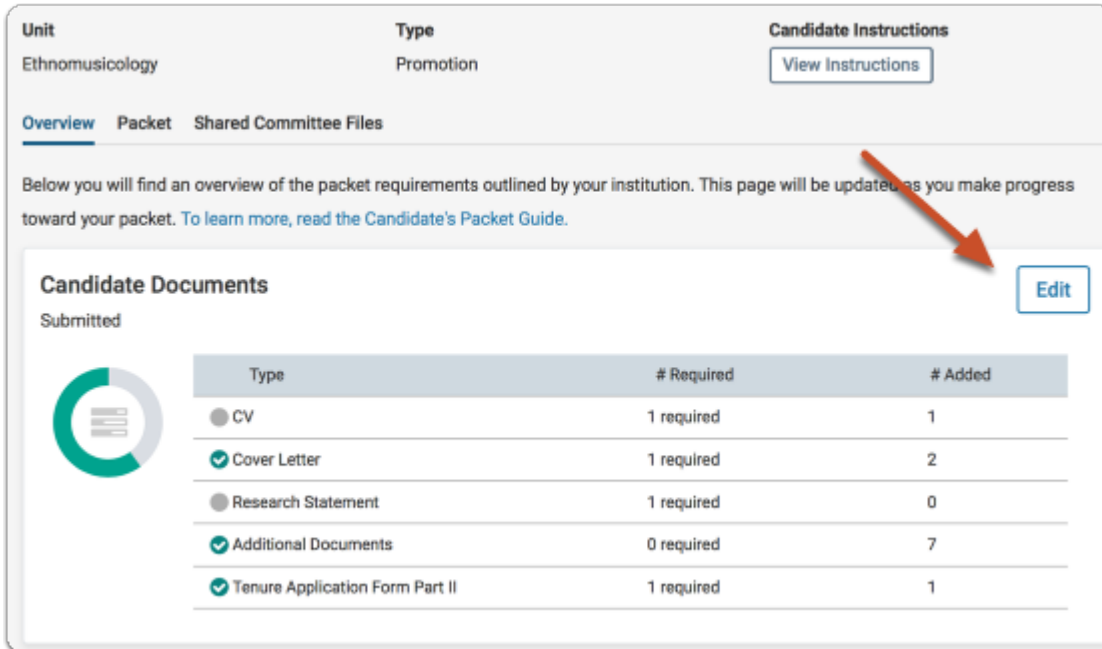
Overview **Packet** Shared Committee Files

Expand All
 Collapse All
 Add Section

> **Candidate Documents**
 Not Yet Submitted Unlocked

Add files to satisfy packet requirements:

Click the "Edit" button for the section to which you want to add your files



Unit: Ethnomusicology | Type: Promotion | Candidate Instructions: View Instructions

Overview | Packet | Shared Committee Files

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.](#)

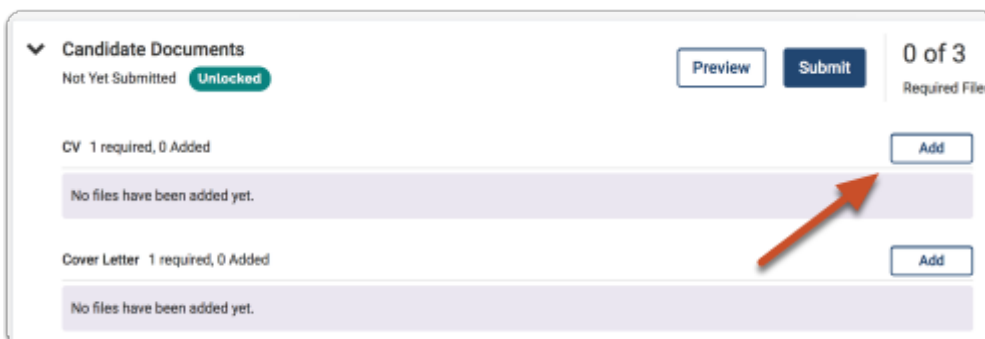
Candidate Documents

Submitted

Type	# Required	# Added
CV	1 required	1
✓ Cover Letter	1 required	2
Research Statement	1 required	0
✓ Additional Documents	0 required	7
✓ Tenure Application Form Part II	1 required	1

[Edit](#)

Click "Add" next to the requirement



Candidate Documents | Not Yet Submitted | Unlocked | Preview | Submit | 0 of 3 Required Files

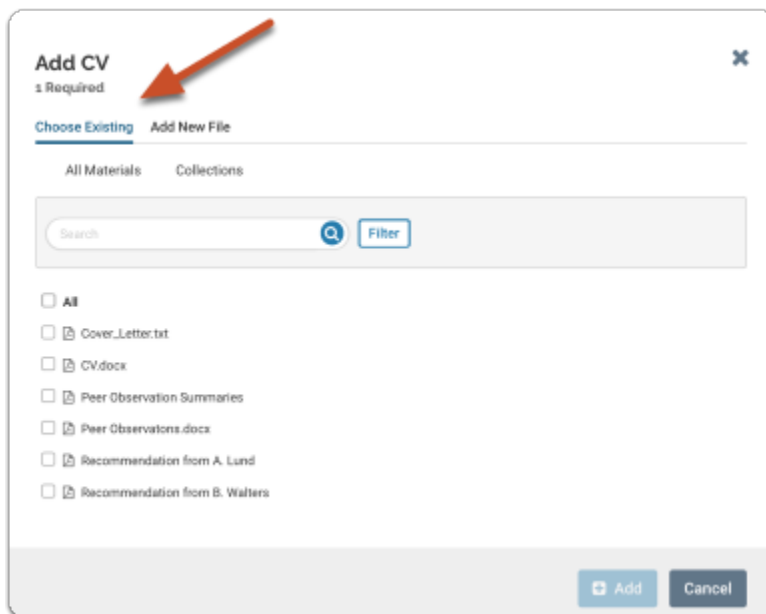
CV 1 required, 0 Added | [Add](#)

No files have been added yet.

Cover Letter 1 required, 0 Added | [Add](#)

No files have been added yet.

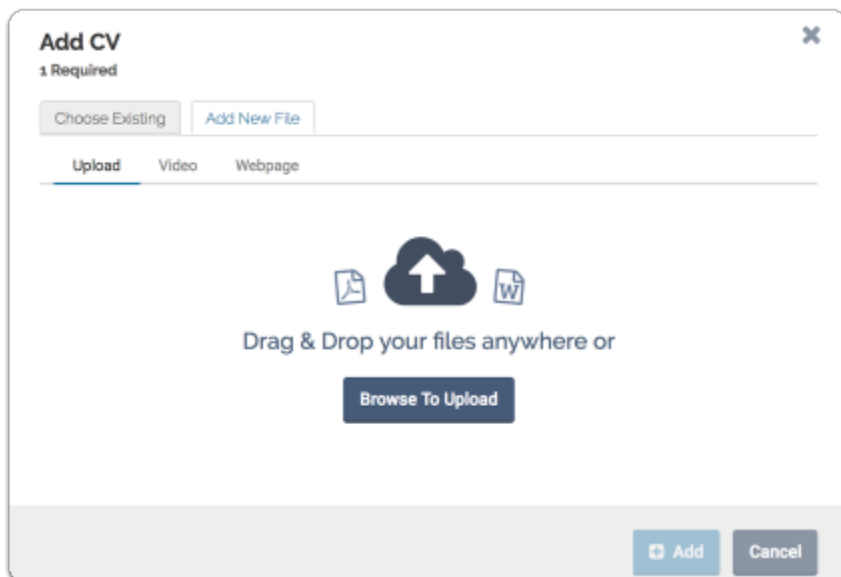
On the "Choose Existing" tab you can add existing files you have already uploaded to your Dossier



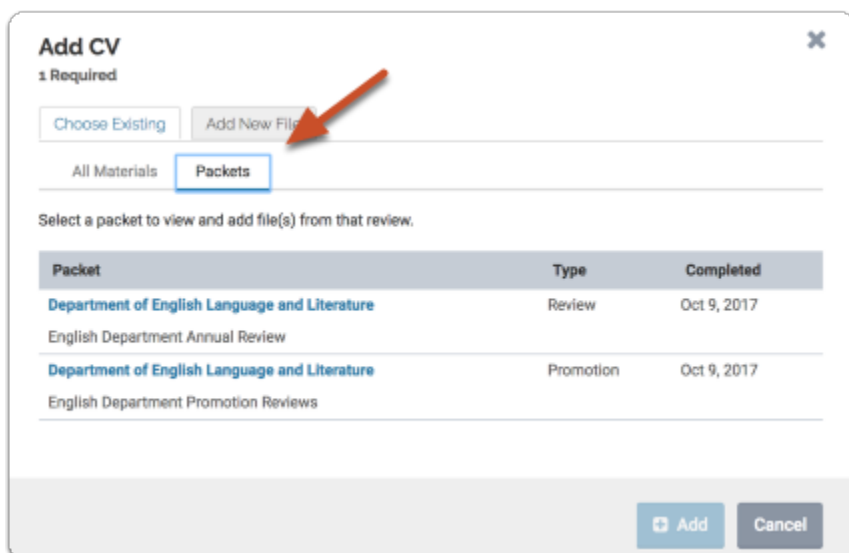
Or you can add new files including video and webpages:

! When uploading files, make sure you give the materials in your packet a meaningful title because reviewers will see the titles you provide as bookmarks to the left of the page when reviewing your documents.

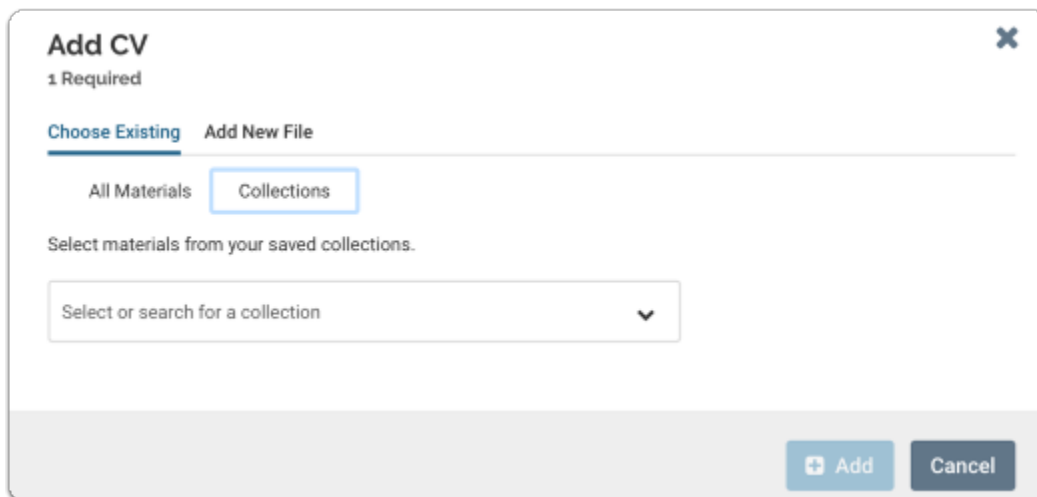
By default, the name that will appear to reviewers is the name of the file as you upload it, but you can also edit the title of a file after adding it to your packet.



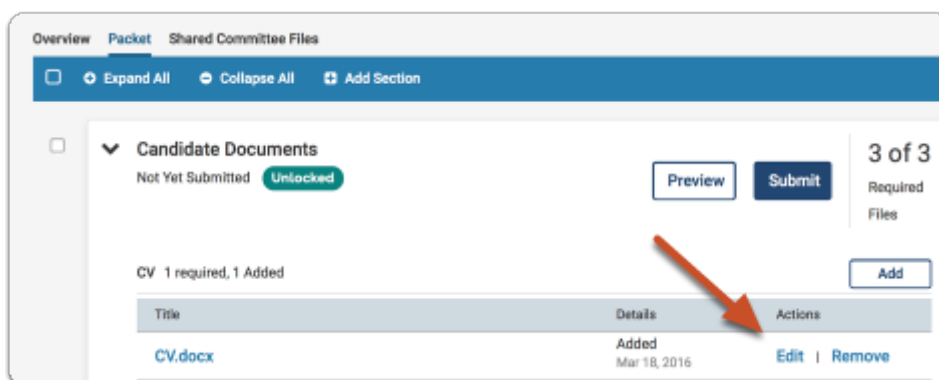
You can add files from packets you have submitted for previous reviews run through RPT:



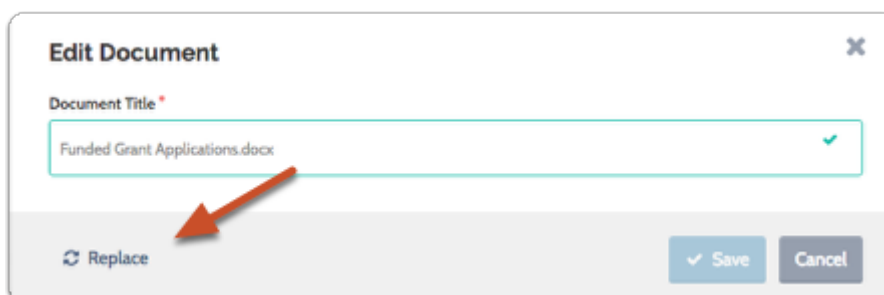
Or, you can add files from collections you have created in your Dossier:



If you need to edit or replace a document, click the "Edit" action




You can edit the title of the file, or click "Replace" to choose a new file to replace it.



Files can also be added (suggested) by an administrator

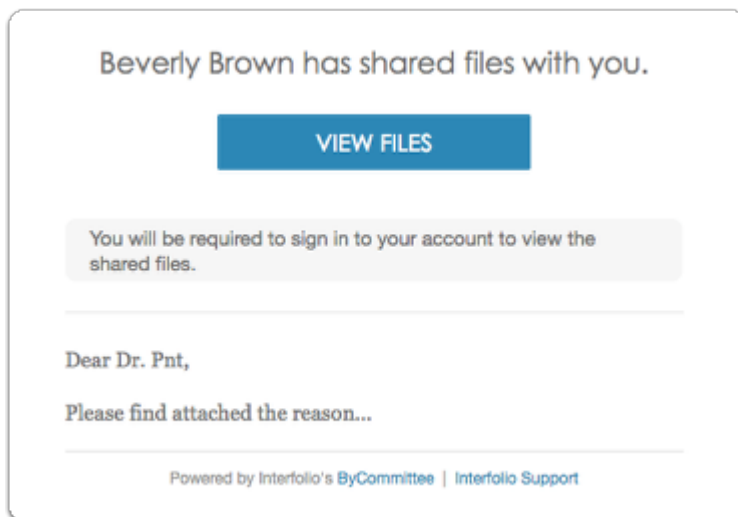
If a file is added to your packet by an administrator, it will appear as "Suggested by..." and the administrator's name. You can choose to keep the file or remove it.


 Note that you cannot delete responses you have submitted to committee files that have been shared with you.

Viewing and Responding to shared files:

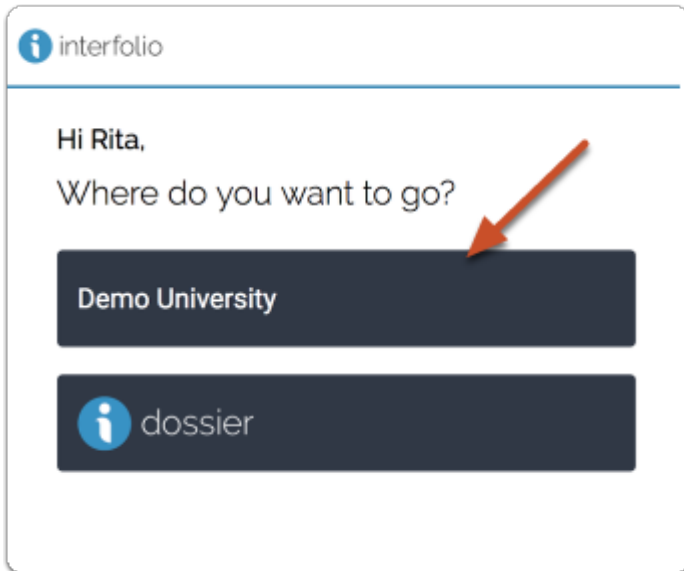
The committee reviewing your case may share files for you to review. The committee may also allow you to respond to the shared files in writing, and may set a date when the response is due.

If the committee shares files with you, you will get an email prompting you to log in and view the shared files.

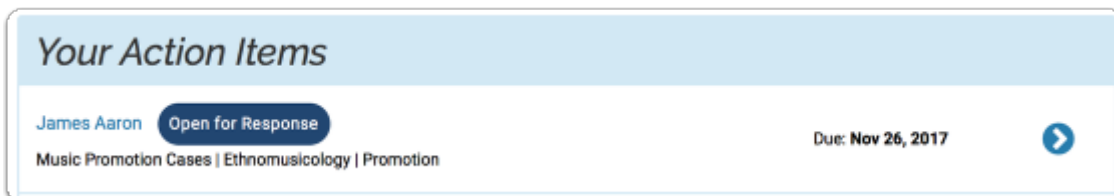


 **Please Note:** The response due date is a hard deadline, and you cannot respond to the shared files after the due date.

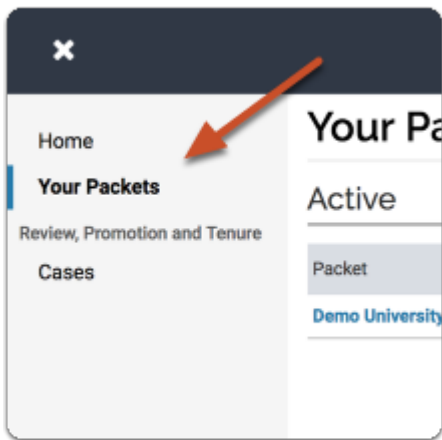
You will need to be logged in to view and/or respond to files shared with you by the committee. Log in to Interfolio and select your institutional account.



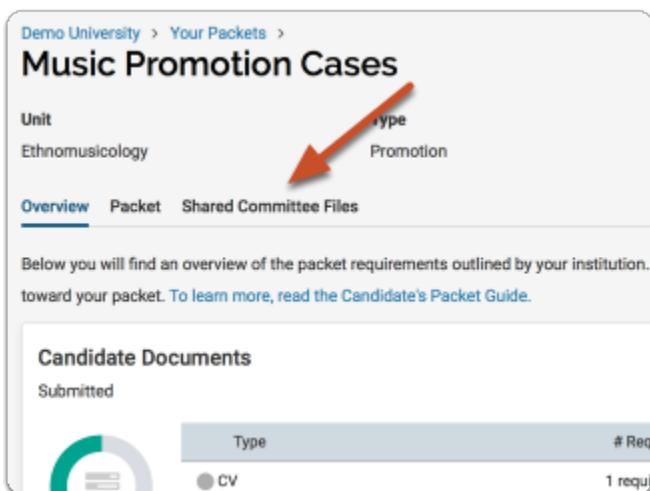
You will see an action item indicating that a file has been shared and an indication if a shared file is open for a response. You can click your name to view the packet.



-or- click "Your Packets" in the left hand navigation and select the case



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



Files shared with you will appear listed

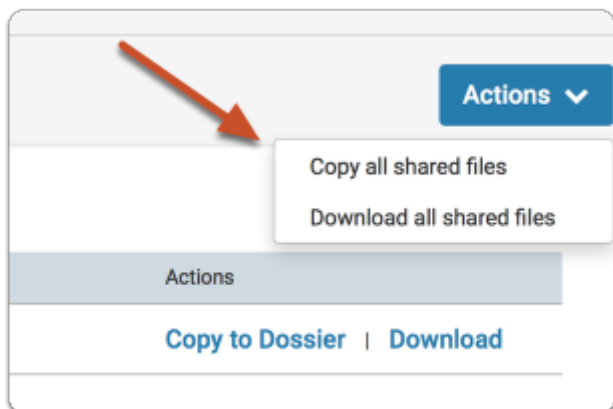
You can download the file, or copy it to your Dossier where it will appear in your Dossier materials.

The screenshot shows a web interface for 'Music Promotion Cases'. At the top, there are navigation links for 'Demo University > Your Packets >' and a 'Preview Packet' button. Below this, the page title is 'Music Promotion Cases'. There are three tabs: 'Unit' (Ethnomusicology), 'Type' (Promotion), and 'Candidate Instructions' (View Instructions). A secondary navigation bar includes 'Overview', 'Packet', and 'Shared Committee Files'. A message states: 'Below you will see files that have been sent to you by committee members.' To the right is an 'Actions' dropdown menu. The main content area shows a file sent by Beverly Brown on Jan 21, 2019. It lists 'Shared Files' and 'Actions'. Under 'Shared Files', there is a file named 'Department Chairs Report'. Under 'Actions', there are links for 'Copy to Dossier' and 'Download'. Below the file list, there is a section for 'Open for Response' with a link to 'View and Respond to Files Shared with You by a Committee'. The 'Due' date is 'Jan 25, 2019', and there is a 'Send Response' button. A red arrow points to the 'Copy to Dossier' link.

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).


The screenshot shows a dialog box titled 'Copy 1 File To My Dossier Account'. It has a close button (X) in the top right corner. The 'Copying To' section shows 'My Dossier Account (xxjrrrrr@demo.edu)'. Below this is the 'Add to this collection (optional)' section, which explains that collections allow grouping documents for easy submission. A dropdown menu is open, showing 'Utah Job' as the selected collection, with a checkmark to its left. Below the dropdown, under 'Shared Files', there is a checkbox labeled 'Department Chairs Report' which is checked. At the bottom of the dialog, there are two buttons: 'Copy' and 'Cancel'.

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

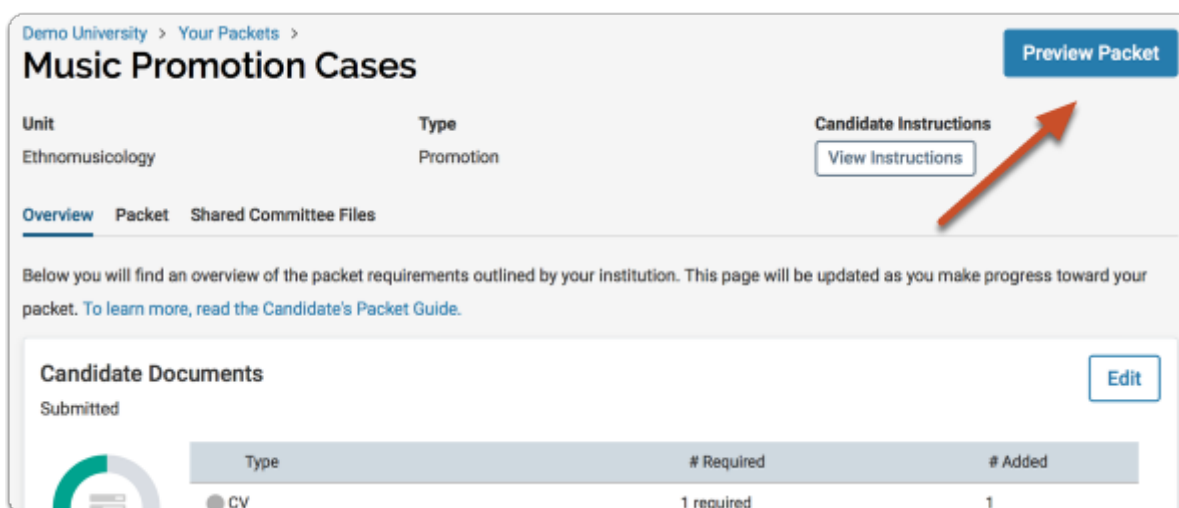


You can preview completed packet sections or your entire packet before submitting:

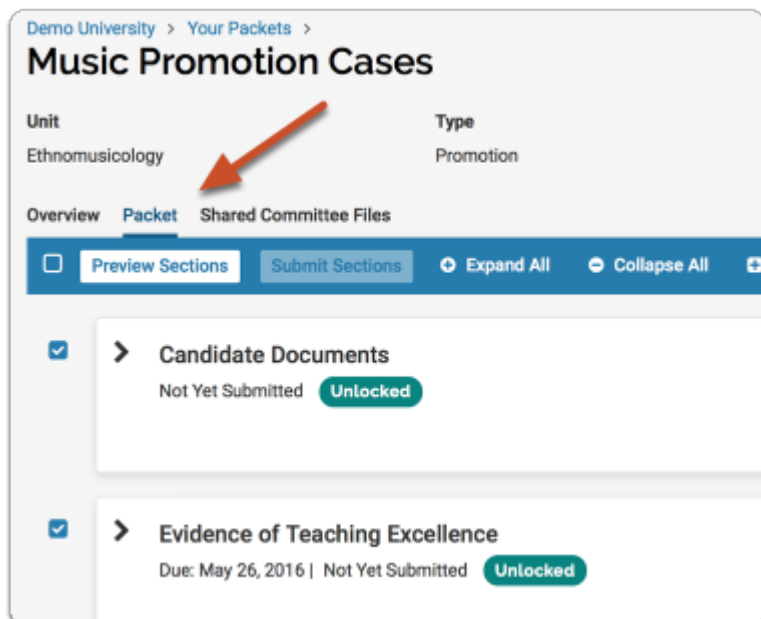
You can preview how your packet will appear to reviewers:

 The preview shows exactly how the packet you are submitting will appear to your committee.

Click "Preview Packet" at the top right of the page



You can click to select multiple sections and preview the selected sections in the document reader



Demo University > Your Packets >

Music Promotion Cases

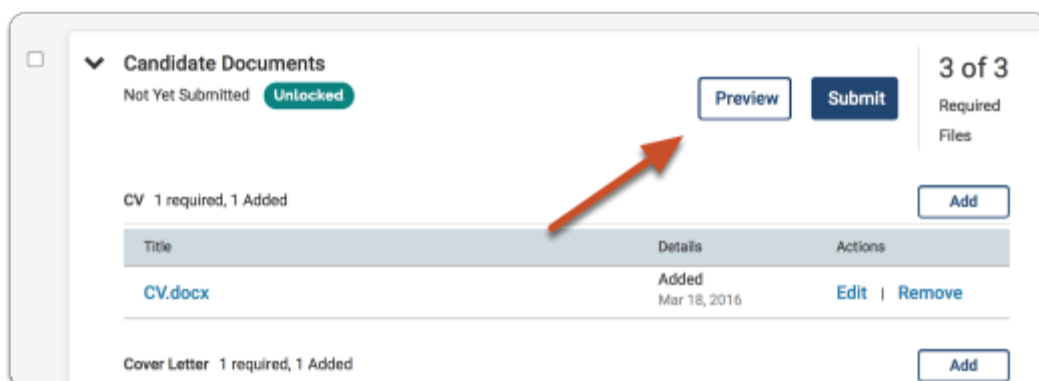
Unit: Ethnomusicology Type: Promotion

Overview **Packet** Shared Committee Files

Preview Sections Submit Sections Expand All Collapse All

- > Candidate Documents
Not Yet Submitted Unlocked
- > Evidence of Teaching Excellence
Due: May 26, 2016 | Not Yet Submitted Unlocked

You can also preview individual sections of the packet



Candidate Documents
Not Yet Submitted Unlocked

CV 1 required, 1 Added Add

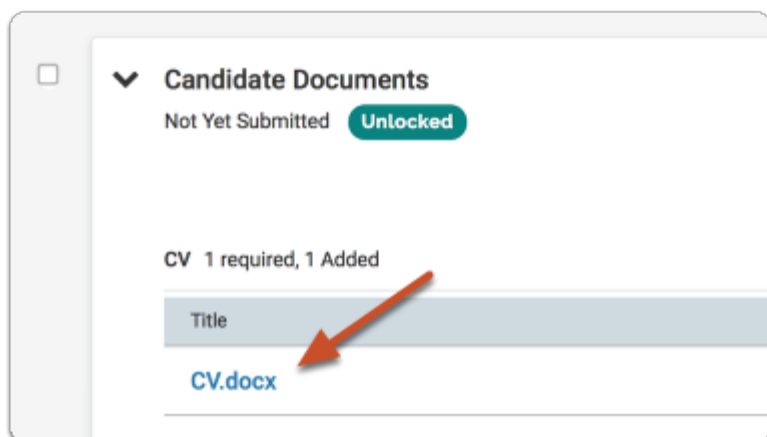
Title	Details	Actions
CV.docx	Added Mar 18, 2016	Edit Remove

Cover Letter 1 required, 1 Added Add

3 of 3 Required Files

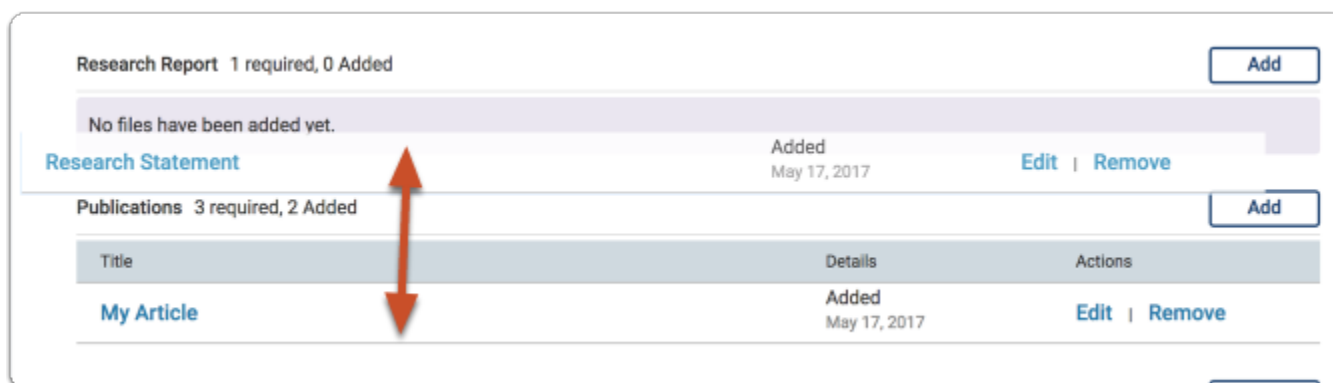
Preview Submit

-and- preview individual documents by clicking the document title



You can drag-n-drop required documents on the packet tab:

- You can move one or more fulfillments from one requirement to another
- You can reorder fulfillments within the same requirement
- However, you can't move or rearrange fulfillments in a locked requirement



Locked Sections

- i** If a section is labeled as "Locked," this means your institution has opted to restrict editing after submission. Please contact an administrator at your institution if you have questions about a locked section.

Submitting candidate packets:

When you submit a section:

If the section doesn't have the required number of materials, you will see a window with a message that about missing items needed to submit:

Submission Confirmation ✕

The section cannot be submitted because there are issues with the requirements listed below. You can submit the section once you have corrected any issues and added materials to meet the requirements for the section.

Requirement Name	Issue
Research Statement	Missing the minimum number required

[Close](#)

When submitting a section that meets the required number of materials, you will see a confirmation message shown below:

Confirm ✕

You cannot edit the documents and forms within a section once it has been submitted. An administrator will need to unlock the section in order for you to make any changes. Are you sure you want to submit the section Personal Statements at this time?

[Yes](#) [No](#)

After you successfully submit a section, you will see a confirmation notice in lower left corner of browser indicating that the section is now available to the appropriate committee members for review.

We have also taken measures to prevent you from adding more than the required number of documents for a given document requirement before submitting your packet.

When you add more documents than the required number, the number added changes color and is bolded to draw attention to the error.

Cover Letter 1 required, **2 Added** [Add](#)

Title	Details	Actions
Research Statement update.doc	Added Mar 18, 2016	Edit Remove
Cover_Letter.txt	Added Mar 18, 2016	Edit Remove

If you try to submit a section with too few or too many materials for the given requirements, you will see a message indicating if the issue is too many or too few requirements. With the text: "You can submit the section once you have corrected any issues and added materials to meet the requirements for the section."

Submission Confirmation ✕

The section cannot be submitted because there are issues with the requirements listed below. You can submit the section once you have corrected any issues and added materials to meet the requirements for the section.

Requirement Name	Issue
Cover Letter	Exceeds the maximum number required
Research Statement	Missing the minimum number required

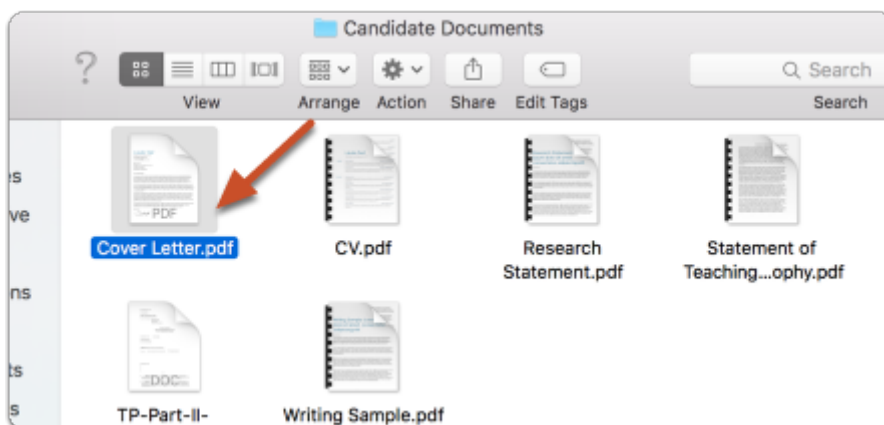
[Close](#)

Best Practices for Naming Packet Materials, and Using Bookmarks to Organize Your Packet

Make sure you give the files in your packet a meaningful title because reviewers will see the titles you provide as bookmarks to the left of the page when reviewing your documents. By default, the name that will appear to reviewers is the name of the file as you upload it, but you can also edit the title of a file after adding it to your packet.

In addition to bookmarking the titles of the materials in your packet, our program will automatically bookmark the bolded headings, sections, and subsections within the documents you upload. Reviewers will see these bookmarks nested beneath the document title, allowing you to draw attention to points in longer documents. See the article below for a more detailed explanation.

Give the files you upload the title that you want to appear to reviewers



-Or- once a file is uploaded, you can edit the title

Click "Edit" in the section where the file has been uploaded

Demo University > Your Packets > **Music Promotion Cases** Preview Packet

Unit: Ethnomusicology Type: Promotion Candidate Instructions: View Instructions

Overview Packet Shared Committee Files

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.](#)

Candidate Documents Edit

Submitted

Type	# Required	# Added
<input type="radio"/> CV	1 required	1
<input type="radio"/> Cover Letter	1 required	1
<input type="radio"/> Research Statement	1 required	1
<input checked="" type="checkbox"/> Additional Documents	0 required	5

Click to edit

Candidate Documents 3 of 3 Required Files

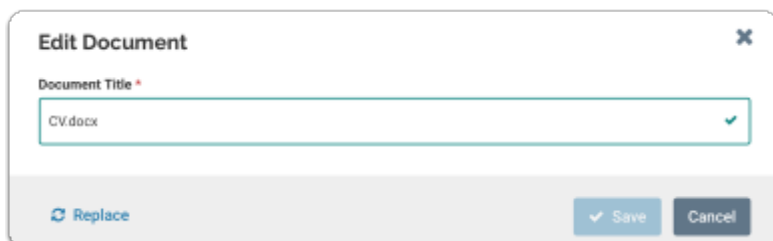
Not Yet Submitted Unlocked Preview Submit

CV 1 required, 1 Added Add

Title	Details	Actions
CV.docx	Added Mar 18, 2016	Edit Remove

Cover Letter 1 required, 1 Added Add

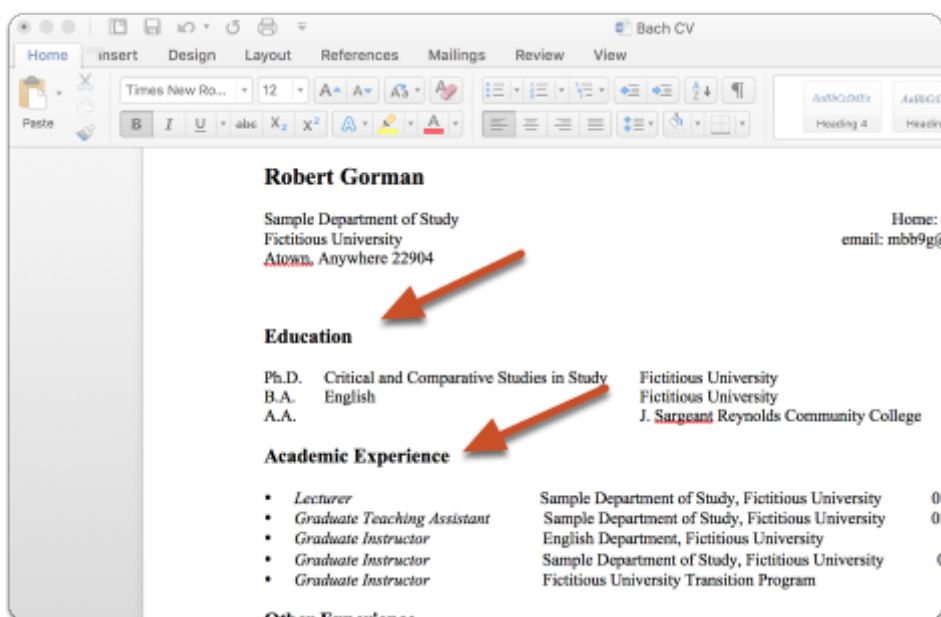
Edit the title and click to save



Use bookmarks to organize your packet and draw attention to a section within a document:

- Remember, the title of the file as it appears in your packet will appear in bold. Any bookmarks in the file are automatically shown in bold and will appear as subsections in the TOC of the packet.

The program will automatically recognize bolded sections and headline formatting in documents created in word processors and similar document editing programs



Sections such as the ones illustrated above will appear to

reviewers as bookmarks in the left hand pane of the document reader

The screenshot shows a document reader interface. On the left, a sidebar titled 'CANDIDATE DOCUMENTS' contains a list of sections for 'Bach CV'. An orange arrow points to the 'Education' section, which is highlighted with a blue border. The main content area on the right displays the 'Randall Bach' CV, with sections for 'Education', 'Academic Experience', and 'Other Experience' visible.

CANDIDATE DOCUMENTS

Bach CV

- Education
- Academic Experience
- Other Experience
- Research Interests
- Awards, Funding, and Other Support
- Publications and Scholarly Work
 - Works in Progress
 - Publications
 - Dissertation
 - Presentations at Conferences, Symposia, and Workshops
- Teaching Statement
- Teaching Experience

Randall Bach

Sample Department of Study
Fictitious University
Atown, Anywhere 22904

Education

Ph.D. Critical and Comparative Studies
B.A. English
A.A.

Academic Experience

- Lecturer
- Graduate Teaching Assistant
- Graduate Instructor
- Graduate Instructor
- Graduate Instructor

Other Experience

Note that even subsections are bookmarked in the reader as shown below

The screenshot shows the same document reader interface, but with the 'Awards, Funding, and Other Support' section selected in the sidebar. An orange arrow points to this section in the sidebar, and another orange arrow points to the corresponding content in the main area. The main content area displays the 'Awards, Funding, and Other Support' section, followed by 'Publications and Scholarly Work', 'Works in Progress', 'Publications', and 'Dissertation'.

CANDIDATE DOCUMENTS

Bach CV

- Education
- Academic Experience
- Other Experience
- Research Interests
- Awards, Funding, and Other Support
- Publications and Scholarly Work
 - Works in Progress
 - Publications
 - Dissertation
 - Presentations at Conferences, Symposia, and Workshops
- Teaching Statement
- Teaching Experience

Awards, Funding, and Other Support

- Samuel Stewart Fellowship for Graduate Studies in Study
- Samuel Stewart Fellowship for Graduate Studies in Study
- Craig W. MacDonald Fellowship
- WHP Young Presidential Fellowship
- Kepone, "Ugly Dance" WorldFest Houston International Film Festival
- GWAR. "Phallus in Wonderland" NARAS "Grammy" Nomination

Publications and Scholarly Work

Works in Progress

- Bach, Randall Eternal., "Cat Study: Composer Dika Newlin's Punk *Journal of the Society of American Study*, May 2013.
- Bach, Randall Eternal., "Out of Business: Ethnography of an American *EthnoStudyology*, June 2013


Publications

- Bach, Randall Eternal., "Review of *American Hardcore*", in *Journal of American Studies*, 2007.

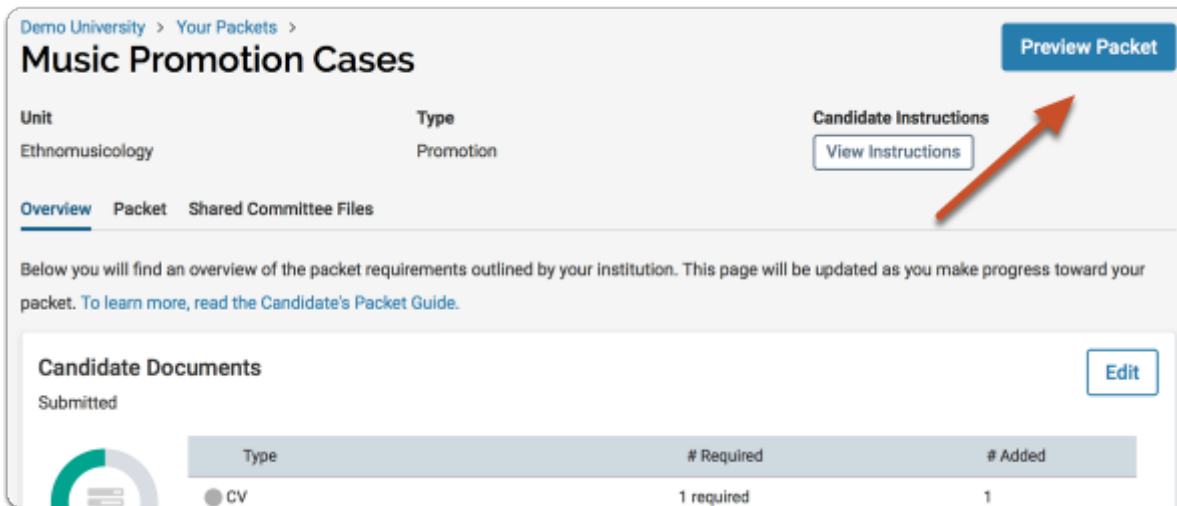
Dissertation

- "A Socioesthetics of Punk: Theorizing Personal Narrative, History, and the Punk Ethic"

You can preview how your packet will appear to reviewers:

-  The preview shows exactly how the packet you are submitting will appear to your committee. A sample preview is shown below.

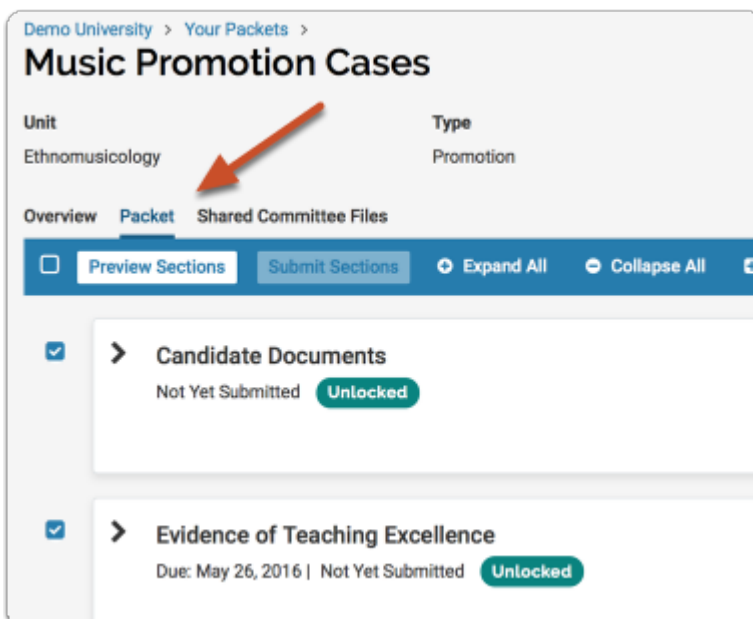
Click "Preview Packet" at the top right of the page



The screenshot shows the 'Music Promotion Cases' page for Demo University. The page title is 'Music Promotion Cases'. The unit is 'Ethnomusicology' and the type is 'Promotion'. There is a 'Candidate Instructions' section with a 'View Instructions' button. A red arrow points to the 'Preview Packet' button in the top right corner. Below the instructions, there is a section for 'Candidate Documents' with a table showing the status of documents.

Type	# Required	# Added
CV	1 required	1

You can click to select multiple sections and preview the selected sections in the document reader



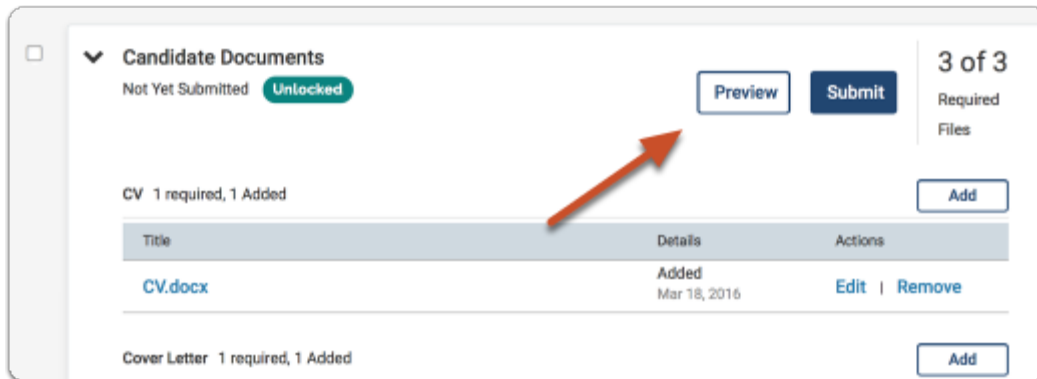
The screenshot shows the 'Music Promotion Cases' page for Demo University. The page title is 'Music Promotion Cases'. The unit is 'Ethnomusicology' and the type is 'Promotion'. There is a 'Candidate Instructions' section with a 'View Instructions' button. A red arrow points to the 'Preview Sections' button in the top left corner. Below the instructions, there is a section for 'Candidate Documents' with a table showing the status of documents.

Type	# Required	# Added
CV	1 required	1

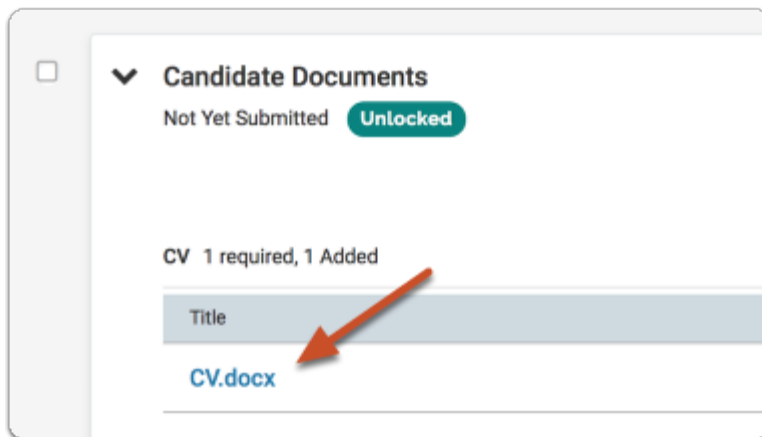
The 'Candidate Documents' section is expanded, showing two sections:

- Candidate Documents
Not Yet Submitted **Unlocked**
- Evidence of Teaching Excellence
Due: May 26, 2016 | Not Yet Submitted **Unlocked**

You can also preview individual sections of the packet



-and- preview individual documents by clicking the document title



You can drag-n-drop required documents on the packet tab:

- You can move one or more fulfillments from one requirement to another
- You can reorder fulfillments within the same requirement
- However, you can't move or rearrange fulfillments in a locked requirement

Research Report 1 required, 0 Added Add


No files have been added yet.

Research Statement		Added	Edit Remove	
		May 17, 2017		

Publications 3 required, 2 Added Add

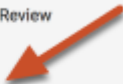
Title	Details	Actions
My Article	Added May 17, 2017	Edit Remove

Review your packet or packet sections before submission:

 When you have satisfied all the requirements in your packet, or all the requirements in a section of the packet, it is a good idea to preview your packet to make sure all of your titles and bookmarks are displaying correctly.

To submit, select multiple sections and click "Submit Sections," or submit sections individually

Demo University > Your Packets > **Dental School Annual Review** Preview Packet

Unit: Demo University Type: Review  Candidate Instructions: View Instructions

Overview Packet

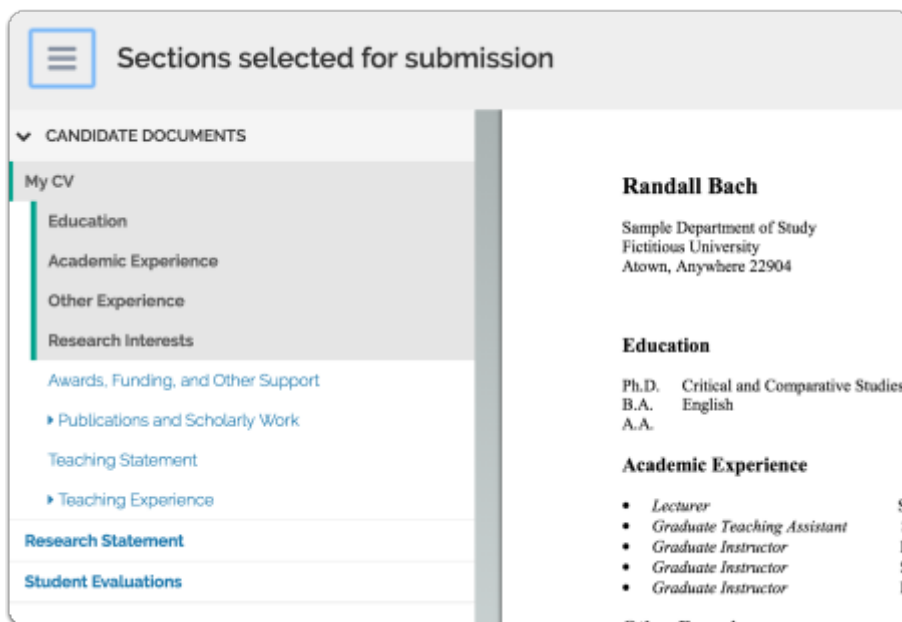
Preview Sections Submit Sections Expand All Collapse All

▼ Candidate Documents Not Yet Submitted **Unlocked** 1 of 1 Required Files

Test Req 1 required, 1 Added Add

Title	Details	Actions
Cover Letter	Added Jan 21, 2019	Edit Remove

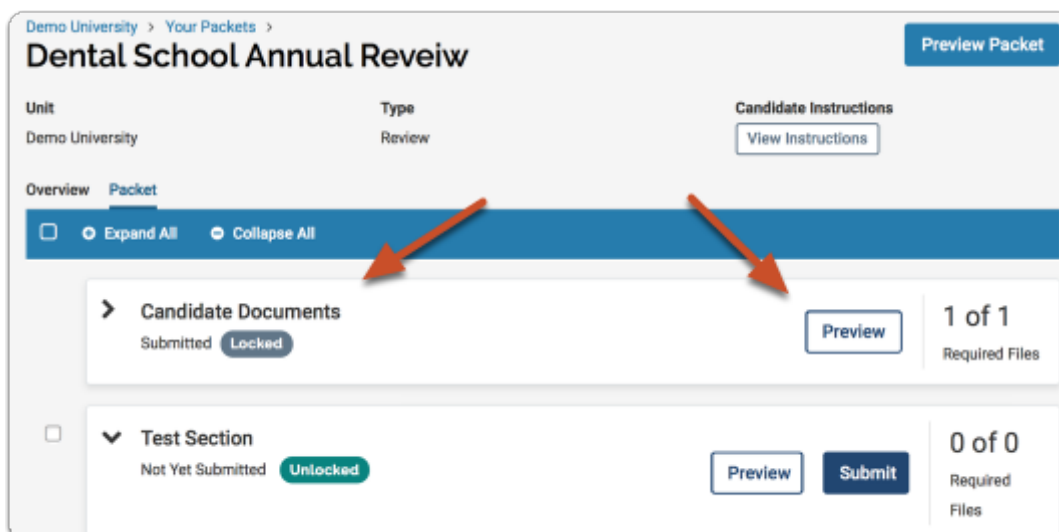
When you preview from your packet, the packet (or selected sections) will display as it will appear to your viewers



After you submit a section, the section appears as collapsed by default on the packet requirements tab of the packet.

If the section is editable, and you add a document to a requirement within that section, the section then auto collapses again after the document is successfully added.

You can preview the completed section to see how it appears in the document reader to reviewers.

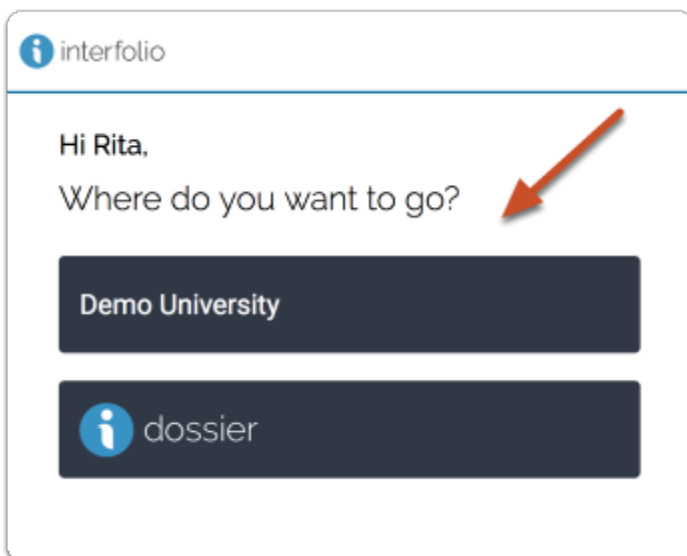


Add Links to Webpages, and YouTube and Vimeo Videos to Your Packet

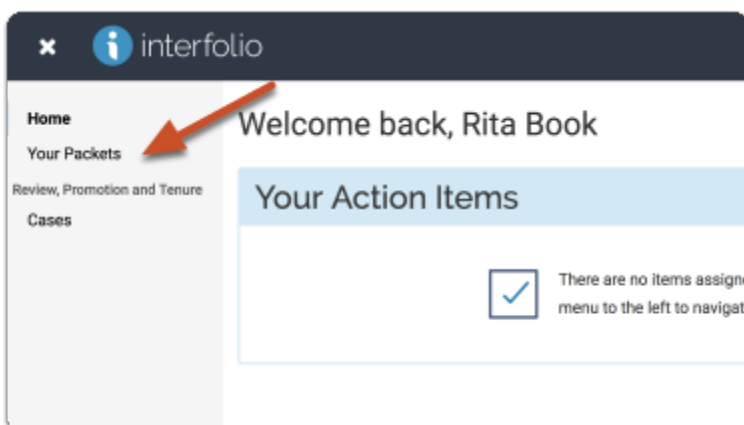
Follow the instructions below to include links to webpages, and YouTube or Vimeo videos in your packet of materials.

Access your packet of materials

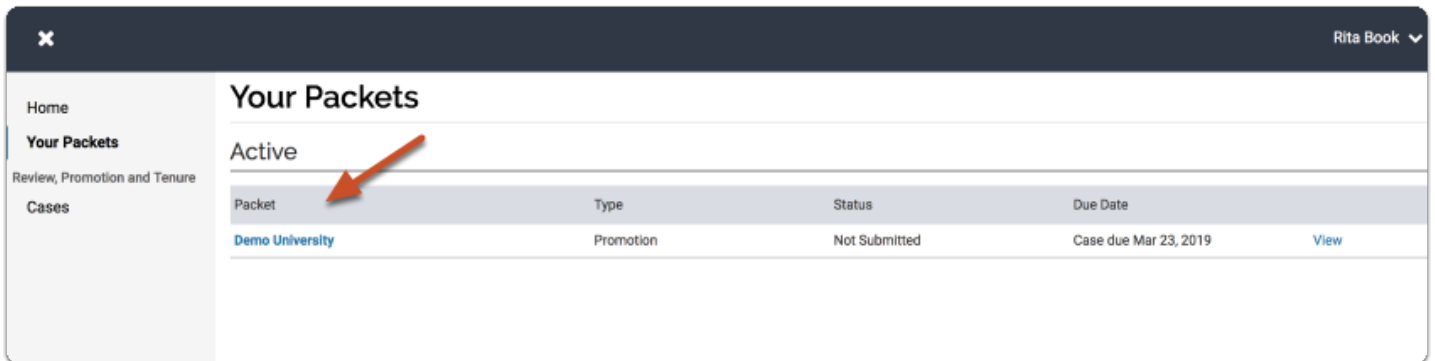
When you sign in to Interfolio, go to your institutional account



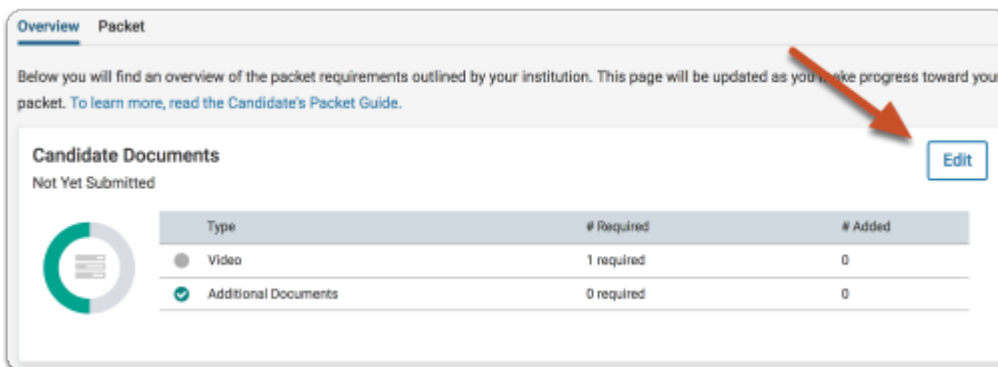
Select "Your Packets" from the left hand navigation menu



Open your case packet



On the "Overview" tab, click "Edit" on the section of the packet you want to edit



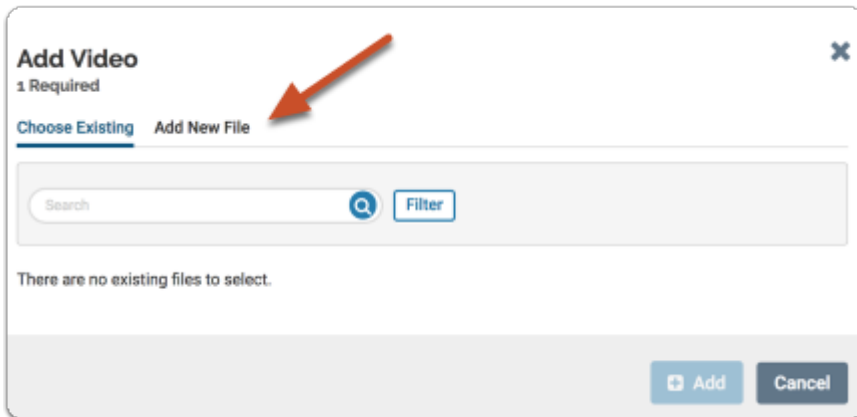
To add links to YouTube or Vimeo videos:

Click "Add" where you want to include a video

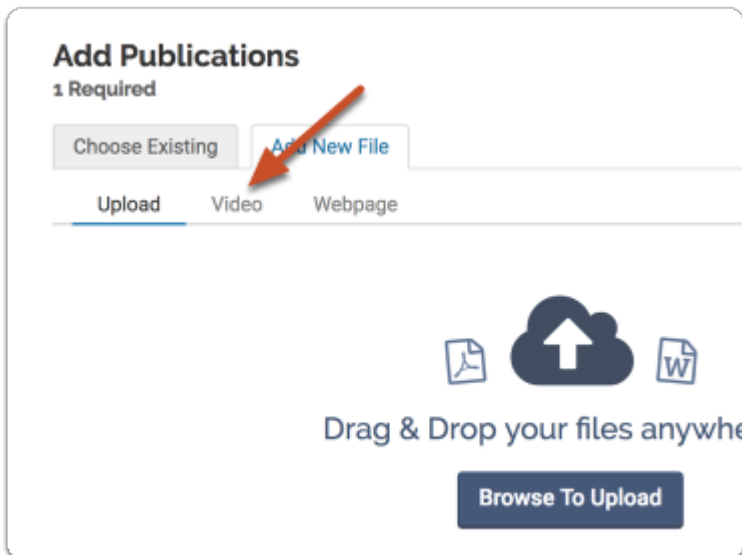


Open the "Add New File" tab, or, "Choose Existing" if you want to

add a video you have previously added to your Dossier



Select "Video"



Give your video a title, enter a YouTube or Vimeo URL linking to your video, enter a description, and click "Add"

! The URL must be to a video hosted on YouTube or Vimeo.

💡 If you want to share your video only with the people reviewing your materials, you can control who has access to the video by changing the privacy settings for your video in YouTube or Vimeo.

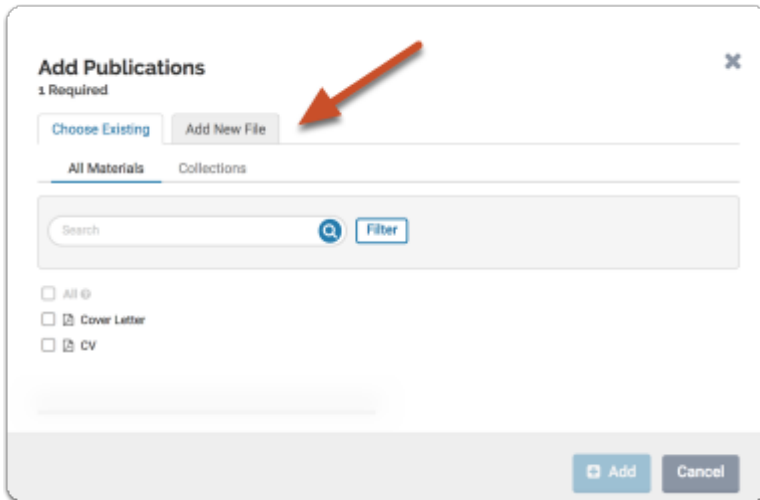
See here for [instructions on sharing a URL to a protected YouTube or Vimeo video](#).

To add a link to a webpage:

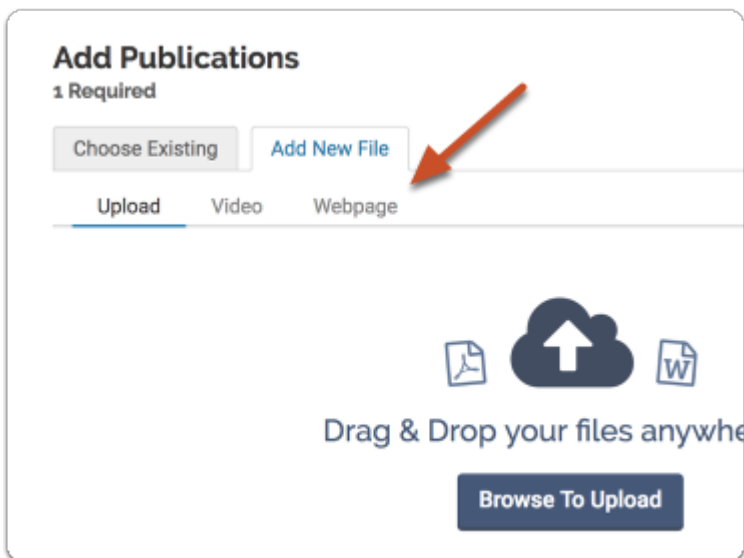
Click "Add" where you want to include a link

Open the "Add New File" tab or select a link you have previously

added to your Dossier



Select "Webpage"



Give your webpage a title, enter the URL. You can also add a description to describe or give context for the web link

 Make sure you include the prefix, such as <http://>

Add Publications ✕

1 Required

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 *

URL *
Description ⓘ

A link to the webpage will display to reviewers when viewing your packet of materials


☰ Only show submitted sections.

▼ CANDIDATE DOCUMENTS

CV

Test Web Page

▶ DOCUMENTATION OF TEACHING EXCELLENCE



<http://www.interfolio.com>

Note: Clicking the link above will open the webpage in a new tab.


Share Access to a Protected YouTube or Vimeo Video

If you include a link to a YouTube or Vimeo video with your materials, you may want to make sure only your reviewers or committee members can see the video. In that case, you will need to restrict access to the video in the privacy settings of YouTube or Vimeo.

Both YouTube and Vimeo have different options for controlling access to videos hosted on their sites, but the methods outlined below will work best for linking to protected content from within our program.

Note that to share a private link for a Vimeo video, you will need a paid account.

For YouTube URLs:

 Videos uploaded to YouTube are set as "public" by default, but you can control the privacy setting when uploading a video or edit the privacy settings for videos you have already uploaded.

Change the privacy settings for your YouTube video to "Unlisted" before adding the YouTube URL to your materials

We recommend setting the privacy for YouTube hosted videos to "unlisted" before adding the URL to your materials.

With this setting, your video will not come up in search results or appear listed on your YouTube channel.

Only those who know the link can view it, and you can share the link with anyone, even those who do not have a YouTube account or username.

When uploading your video to YouTube, select "Unlisted" as the privacy setting, or go to your "Video Manager," find the video and select "Unlisted" from the dropdown menu.

See here for more [instructions on setting the privacy of YouTube videos](#).

- ⚠ Note that anyone with the link can view an unlisted video on YouTube. It is conceivable that a reviewer may share the link. If you are concerned, you may want to include a note in the description asking reviewers not to share the link.

The video below explains more about YouTube privacy settings

For Vimeo URLs:

- ℹ Vimeo requires a paid account to share a private link to a video.

See here for [more instructions on managing privacy settings in Vimeo](#).

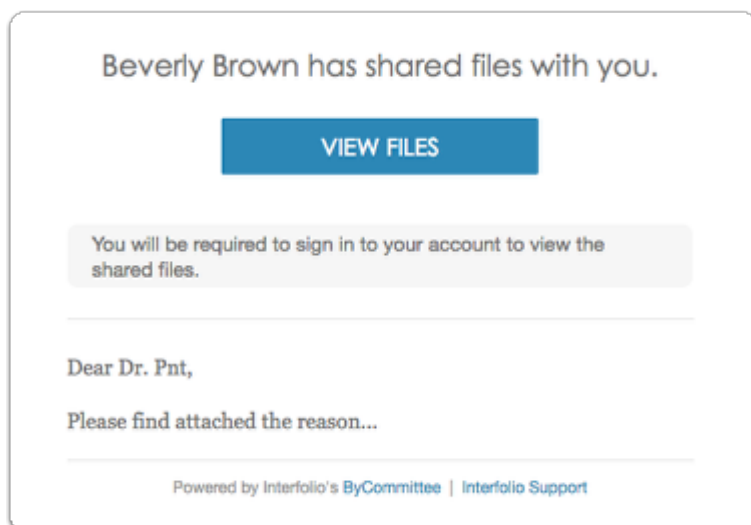
- ⚠ Currently, Interfolio can only display "public" videos from Vimeo. If you want to share a private link, it is advised that you upload a document with links to a "private" or password protected Vimeo video, or use a "private" Youtube video instead.

View and Respond to Files Shared with You by a Committee (Rebuttal)

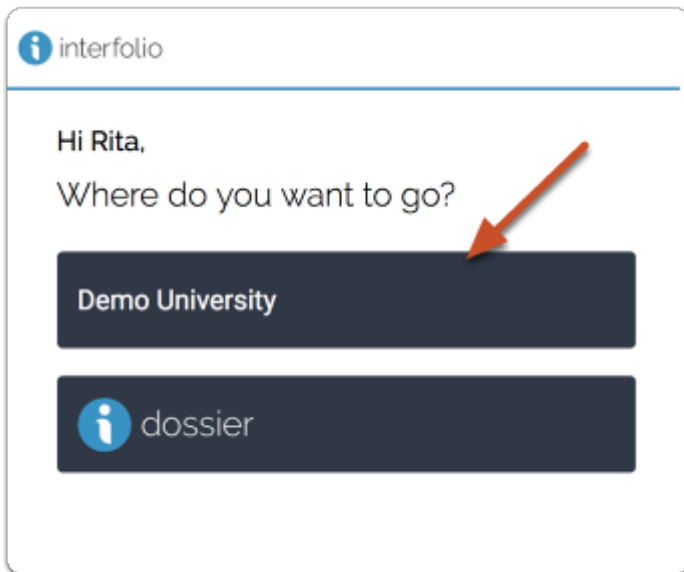
The committee reviewing your case may share files for you to review. The committee may also allow you to respond to the shared files in writing, and may set a date when the response is due.

The most common scenario is when the committee has made a decision about a candidate and gives the candidate the opportunity to respond. However, there may be other circumstances when the committee or administrative personnel require the candidate to view materials from the case packet.

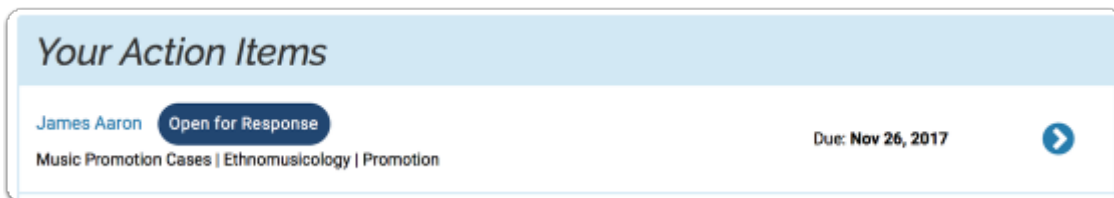
When files are shared with you, you will receive an email message prompting you to log into your account and view the files



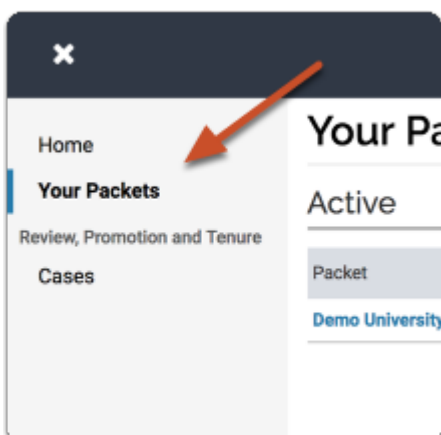
Log in to Interfolio and select your institutional account



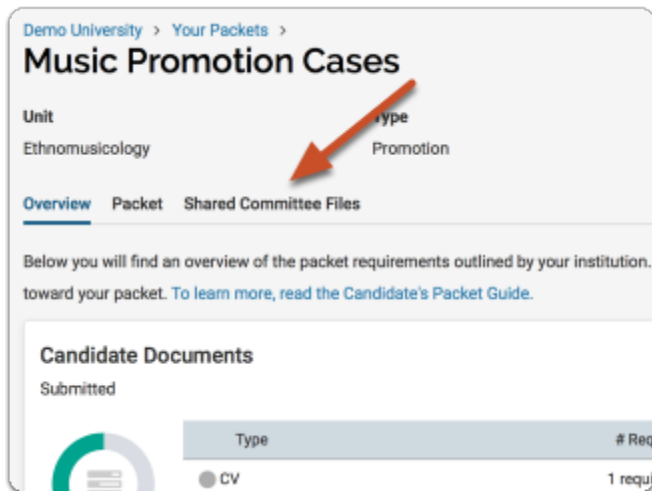
You will see an action item indicating that a file has been shared and an indication if a shared file is open for a response. You can click your name to view the packet.



-or- click "Your Packets" in the left hand navigation and select the case

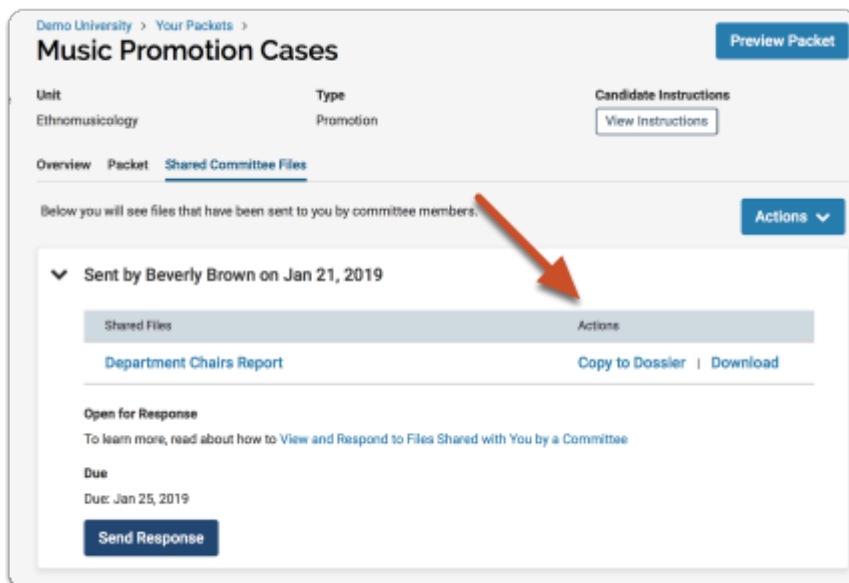


Open the "Shared Committee Files" tab of the case packet

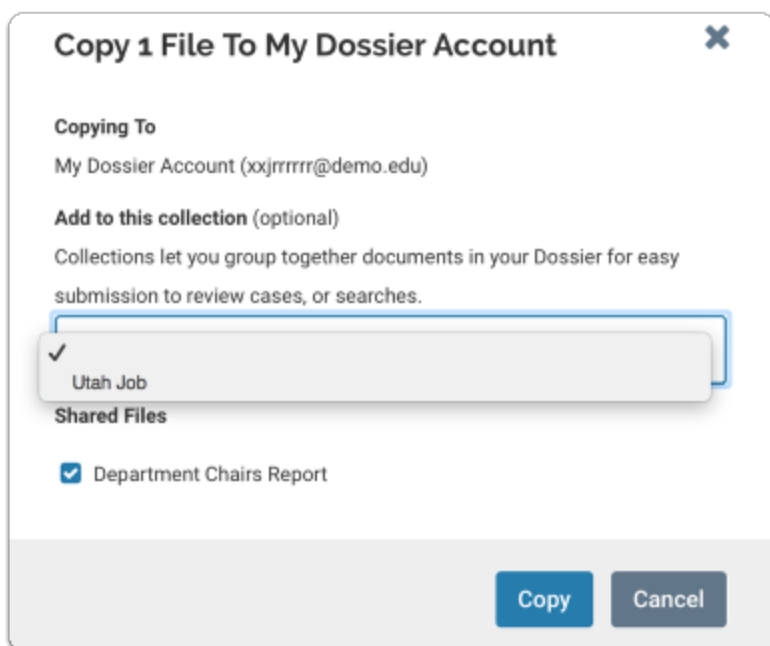


Files shared with you will appear listed

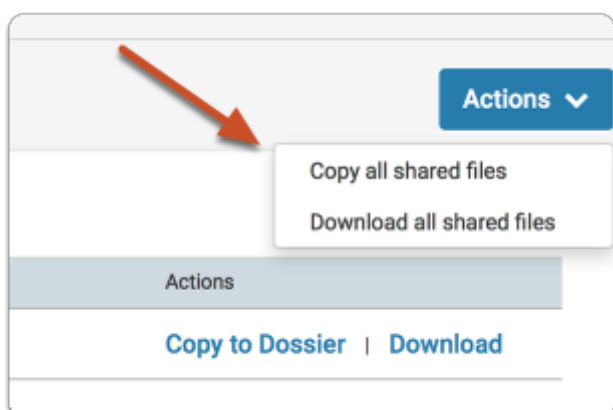
You can download the file, or copy it to your Dossier where it will appear in your Dossier materials.



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).



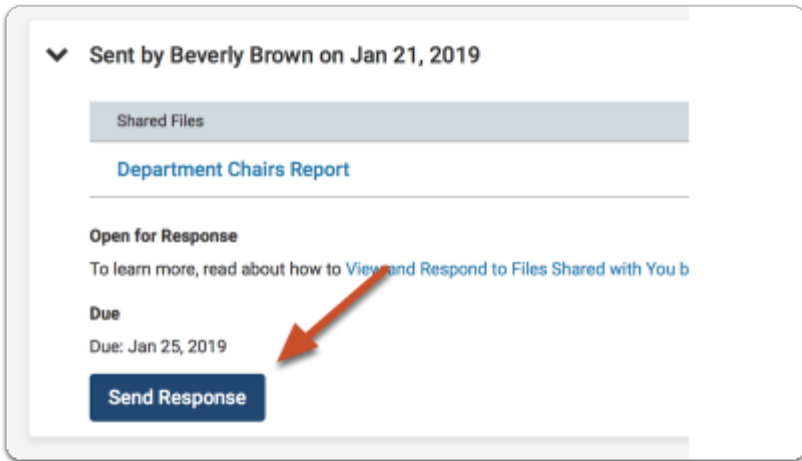
You can also click the "Actions" button to the right of the page to copy or download all shared files.



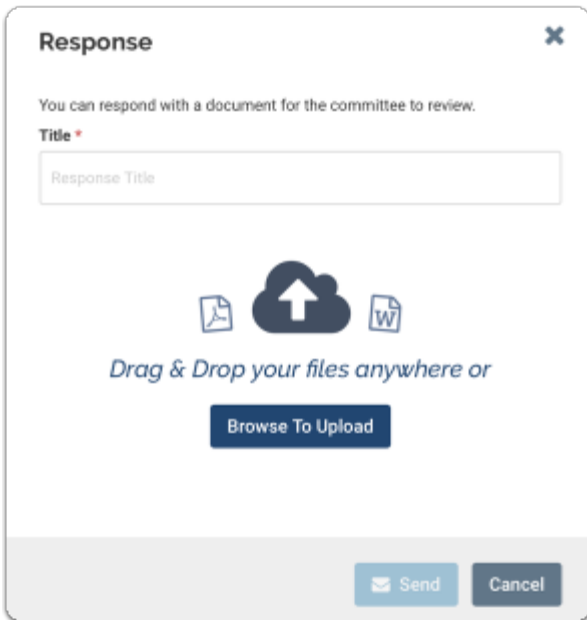
Click "Send Response" to respond to the file

If you are allowed to respond to the content of the file, 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 cannot respond to shared files after the due date.



Give your response a title and upload the document file




Your response will appear in the list of shared files

▼ Sent by Beverly Brown on Jan 21, 2019

Shared Files	Actions
Department Chairs Report	Copy to Dossier Download

Response
To learn more, read about how to [View and Respond to Files Shared with You by a Committee](#)

Shared	Details
Rebuttal to Chair's Report	Sent: Jan 20, 2019



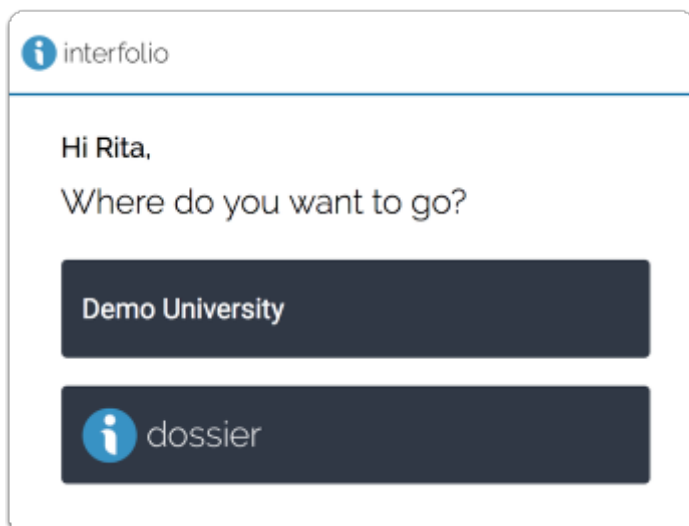
Using Collections From Your Dossier To Satisfy Packet Requirements

This article explains how to use the materials from a collection in the official packet for your review.

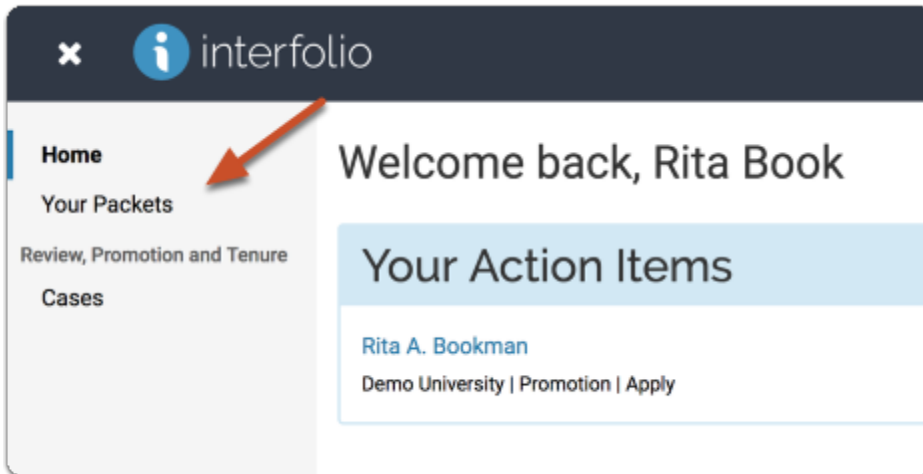
This is particularly handy if you have created a collection based on guidelines for an upcoming review, and are ready to transfer the materials in the collection to your official review packet.

See here for more information on "[Using Guidelines From Dossier to Prepare for Future Reviews.](#)"

Log in and navigate to your institutional account



Select to view your packets



Click the "Edit" button for the section to which you want to add your files

The screenshot shows the 'Candidate Documents' section. At the top, it displays 'Unit: Ethnomusicology' and 'Type: Promotion'. Below this, there are tabs for 'Overview', 'Packet', and 'Shared Committee Files'. A paragraph of text explains that the page will be updated as progress is made. A red arrow points to an 'Edit' button located to the right of the 'Candidate Documents' section.

Candidate Documents

Submitted

Type	# Required	# Added
CV	1 required	1
✓ Cover Letter	1 required	2
Research Statement	1 required	0
✓ Additional Documents	0 required	7
✓ Tenure Application Form Part II	1 required	1

Click "Add" next to the requirement



▼ Candidate Documents
Not Yet Submitted **Unlocked** Preview Submit 0 of 3 Required Files

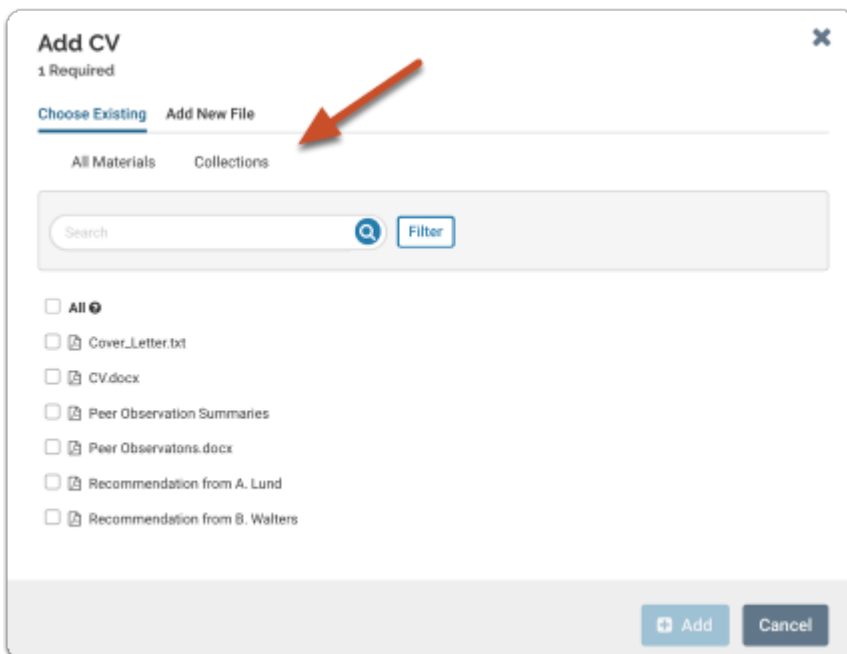
CV 1 required, 0 Added Add

No files have been added yet.

Cover Letter 1 required, 0 Added Add

No files have been added yet.

On the "Choose Existing" tab, click "Collections"



Add CV 1 Required ×

Choose Existing Add New File

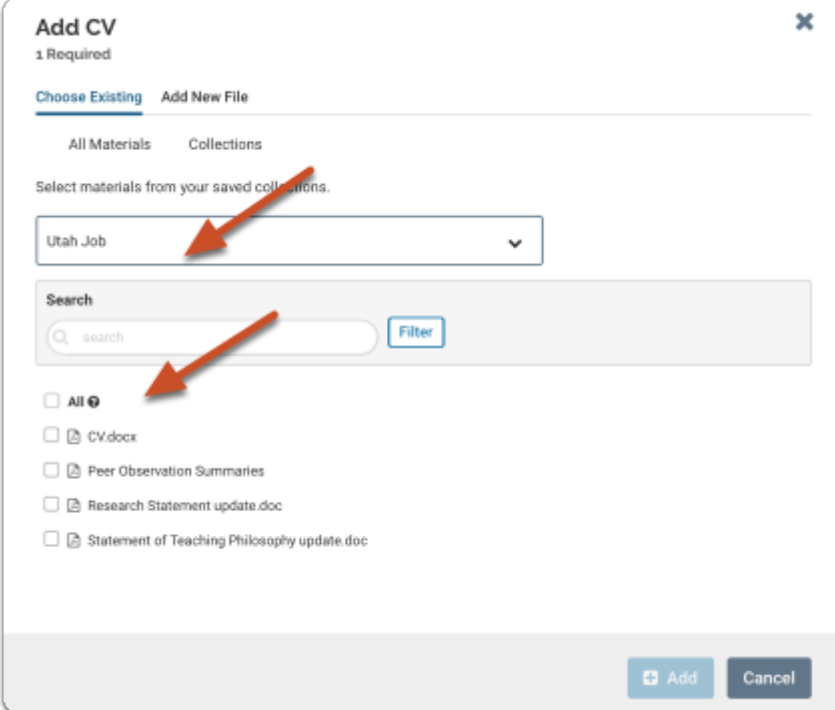
All Materials Collections

Search Filter

- All
- Cover_Letter.txt
- CV.docx
- Peer Observation Summaries
- Peer Observatons.docx
- Recommendation from A. Lund
- Recommendation from B. Walters

Add Cancel

Start typing the collection name, select a collection from the list of results, and select a file to add from the collection



The screenshot shows a dialog box titled "Add CV" with a close button (X) in the top right corner. Below the title, it says "1 Required". There are two tabs: "Choose Existing" (which is active) and "Add New File". Under the "Choose Existing" tab, there are two sub-tabs: "All Materials" and "Collections". Below these, it says "Select materials from your saved collections." There is a dropdown menu currently showing "Utah Job". Below the dropdown is a search bar with the text "search" and a "Filter" button. Below the search bar is a list of document types with checkboxes: "All" (checked), "CV.docx", "Peer Observation Summaries", "Research Statement update.doc", and "Statement of Teaching Philosophy update.doc". At the bottom right of the dialog box are two buttons: "Add" and "Cancel". Two red arrows point to the dropdown menu and the search bar.

- ⓘ Note that you can only select the type of document and number of documents that will satisfy the requirement you are trying to fill. The program will not allow you to add more documents than required or the wrong document type.

Add CV
1 Required

[Choose Existing](#) [Add New File](#)

All Materials Collections

Select materials from your saved collections.

Utah Job

Search [Filter](#)

All CV.docx Peer Observation Summaries Research Statement update.doc Statement of Teaching Philosophy update.doc

Title: CV.docx
Type: CV
Status: Received , Feb 24, 2016 at 12:
ID Number: AE561CFB60
Tags:

The materials from the collection will be added to your packet

Candidate Documents Not Yet Submitted Unlocked [Preview](#) [Submit](#) 1 of 3 Required Files

CV 1 required, 1 Added [Add](#)

Title	Details	Actions
CV.docx	Added Mar 18, 2016	Edit Remove

Using Guidelines In Dossier to Prepare for Future Reviews

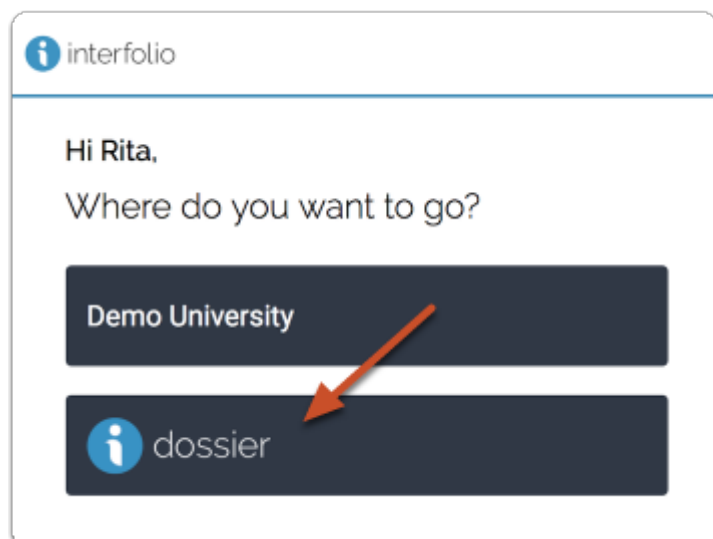
If you have access to Dossier through your institution, the institution may post guidelines in Dossier to guide you in assembling materials for particular review processes such as annual performance reviews, promotion reviews, etc. You can search for and save these guidelines, and reference them as a checklist as you prepare for future reviews.

When preparing for a review using the guidelines feature, you can automatically assemble collections of materials that meet the requirements of the review. When the time comes, you can easily transfer the materials you've assembled in that collection over to the official review packet.

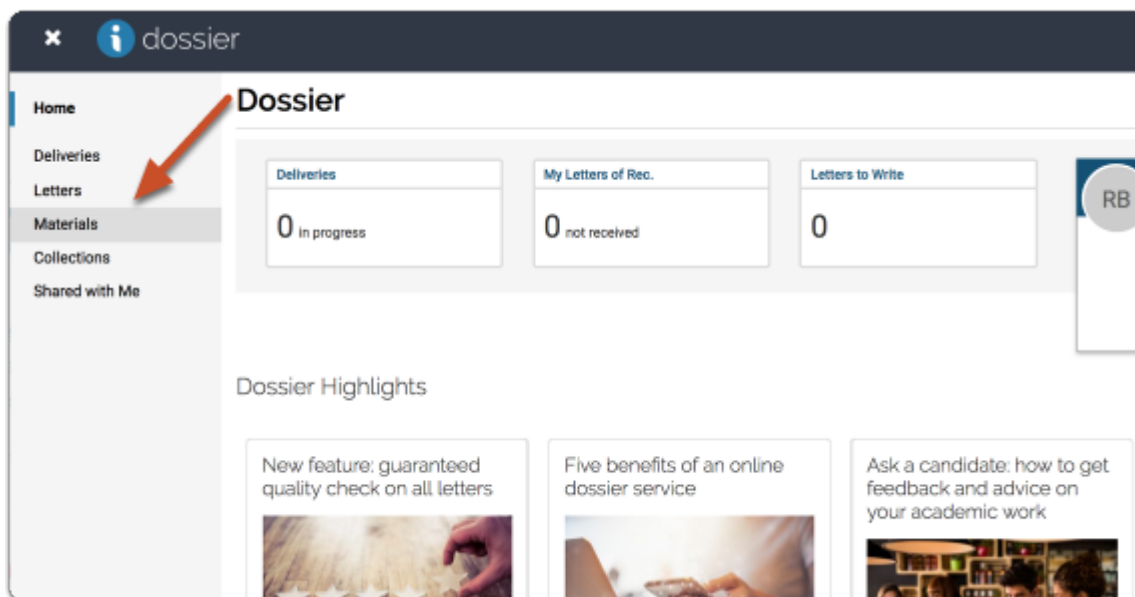
This article explains how to start using guidelines to prepare for your upcoming reviews.

! "Guidelines" are only available to users whose institution subscribes to the feature.

Log in to Interfolio and navigate to your Dossier account

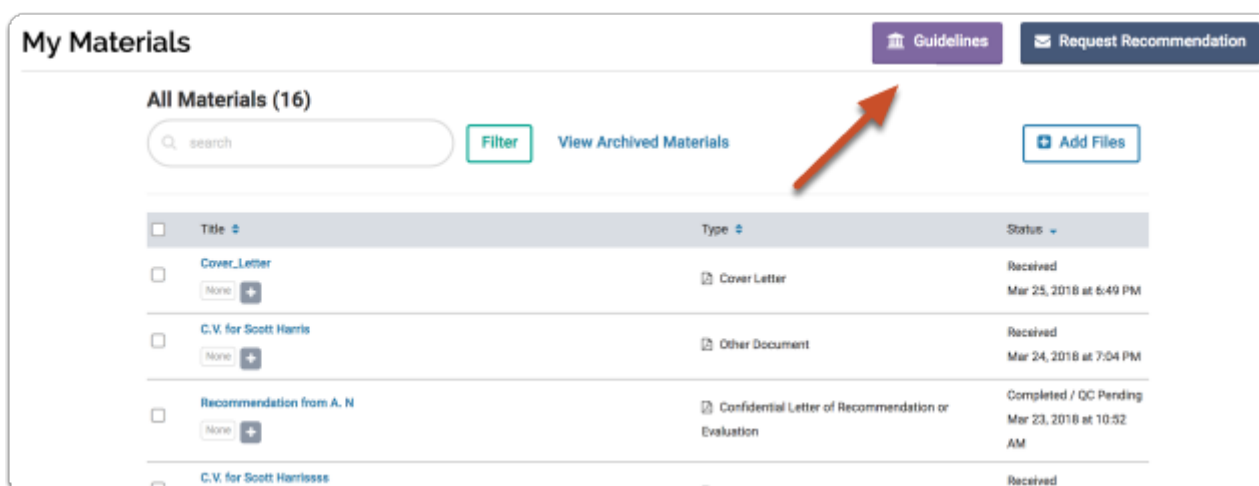


Navigate to the "Materials" section of your Dossier account



Click the "Guidelines" button at the top of the materials page

! The "Guidelines" button will only display if the feature is available at your institution. If it does not display, it is not available.



Search for guidelines

Select a unit from the dropdown menu

Guidelines

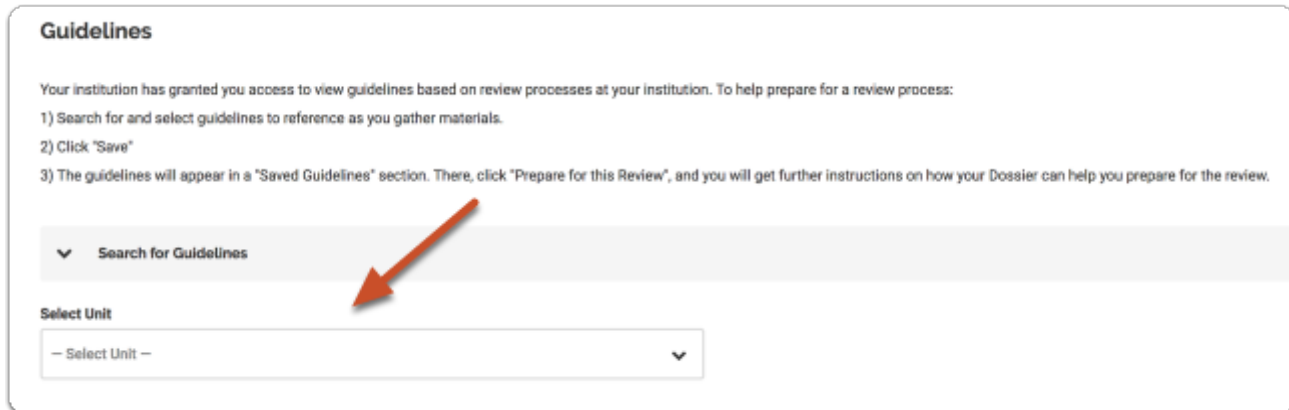
Your institution has granted you access to view guidelines based on review processes at your institution. To help prepare for a review process:

- 1) Search for and select guidelines to reference as you gather materials.
- 2) Click "Save"
- 3) The guidelines will appear in a "Saved Guidelines" section. There, click "Prepare for this Review", and you will get further instructions on how your Dossier can help you prepare for the review.

▼ Search for Guidelines

Select Unit

— Select Unit — ▼



You can search for guidelines within the selected unit using keywords

Guidelines

Your institution has granted you access to view guidelines based on review processes at your institution. To help prepare for a review process:

- 1) Search for and select guidelines to reference as you gather materials.
- 2) Click "Save"
- 3) The guidelines will appear in a "Saved Guidelines" section. There, click "Prepare for this Review", and you will get further instructions on how your Dossier can help you prepare for the review.

▼ Search for Guidelines

Select Unit

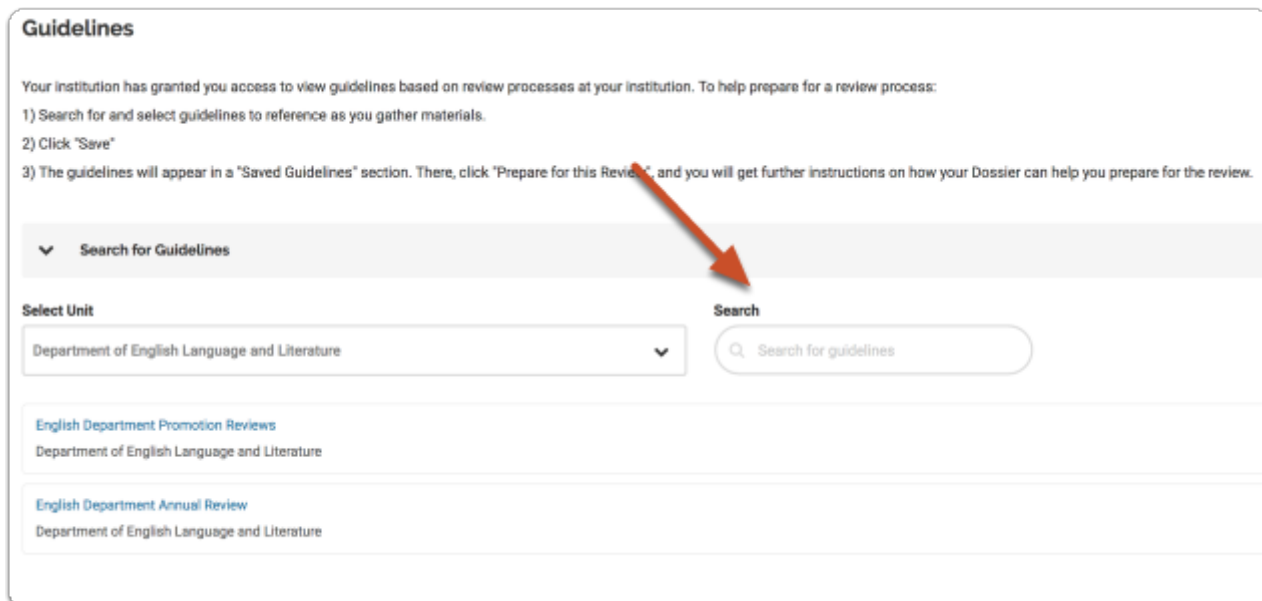
Department of English Language and Literature ▼

Search

Search for guidelines

English Department Promotion Reviews
Department of English Language and Literature

English Department Annual Review
Department of English Language and Literature



Preview guidelines:

Click the title to open a preview of the guideline

Select Unit

Department of English Language and Literature

[English Department Promotion Reviews](#)
Department of English Language and Literature

[English Department Annual Review](#)
Department of English Language and Literature

Any candidate instructions, document, and form requirements associated with the guideline will display

Previewing Guideline - English Department Promotion Reviews ✕

Unit
Department of English Language and Literature

Instructions
All decisions regarding promotion are based on established criteria outlined specifically in official promotion application forms.

▼ Candidate Documents

Document Requirements

CV	1 required
CV	
Research Statement	1 required
Statement of Service	1 required
Publications	1+ required

Form Requirements

Promotion Review Application	Preview
This application must be submitted to the President no later than June 1. All responses should refer to activities since your previous promotion or original appointment.	

[Save Guideline](#) Close

Save the guidelines you want to use

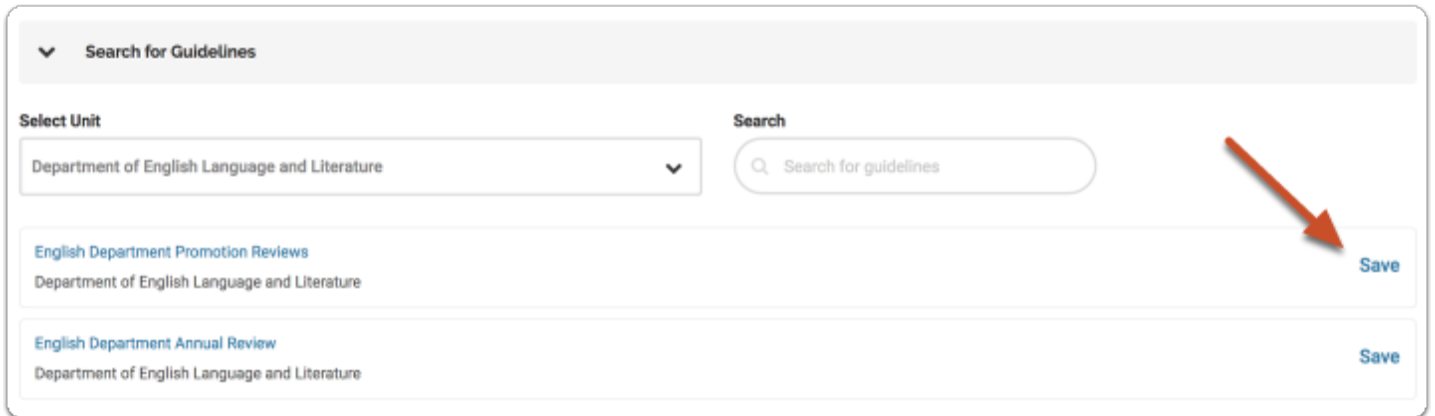
▼ Search for Guidelines

Select Unit
Department of English Language and Literature ▼

Search
Search for guidelines

English Department Promotion Reviews
Department of English Language and Literature [Save](#)

English Department Annual Review
Department of English Language and Literature [Save](#)



Saved guidelines will appear at the top of the "Guidelines" page, for quick reference

Guidelines ✕

Your institution has granted you access to view guidelines based on review processes at your institution. To help prepare for a review process:

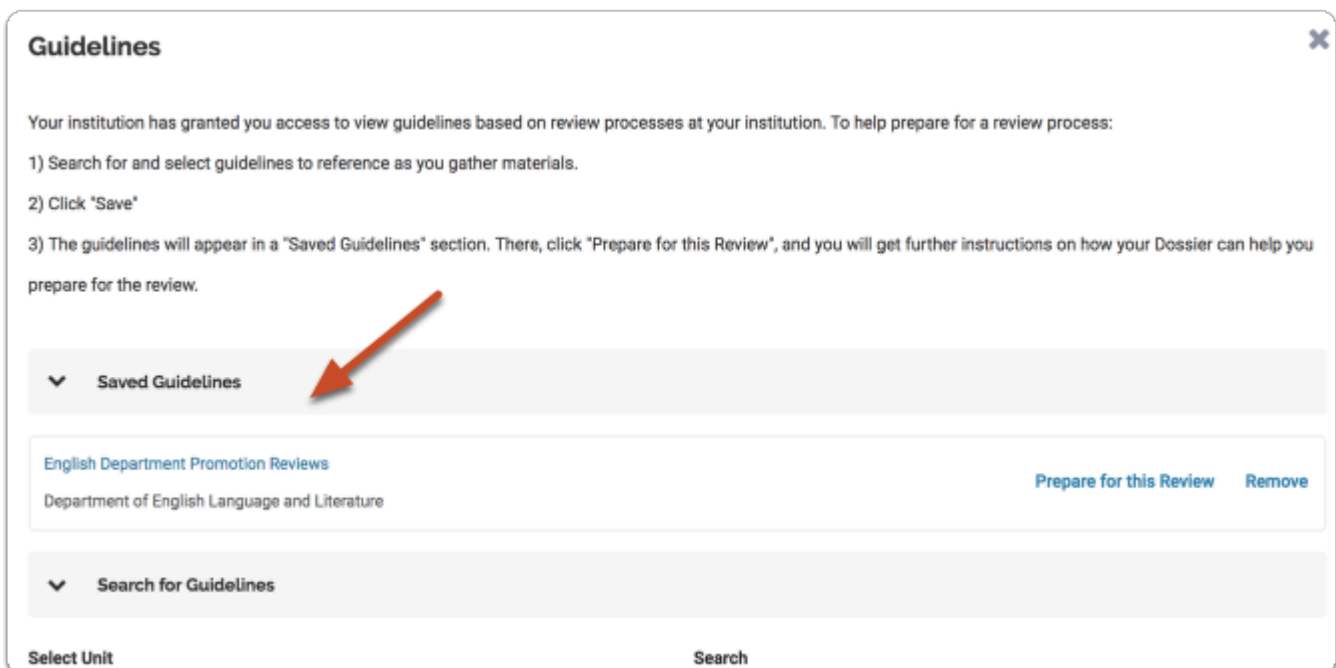
- 1) Search for and select guidelines to reference as you gather materials.
- 2) Click 'Save'
- 3) The guidelines will appear in a "Saved Guidelines" section. There, click "Prepare for this Review", and you will get further instructions on how your Dossier can help you prepare for the review.

▼ Saved Guidelines

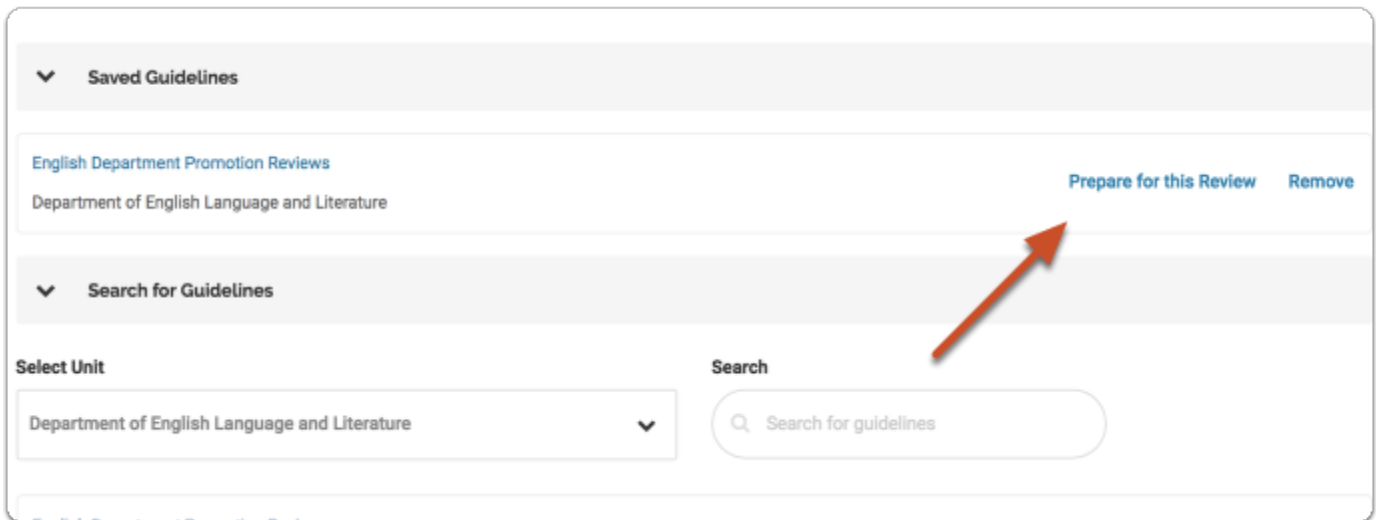
English Department Promotion Reviews
Department of English Language and Literature [Prepare for this Review](#) [Remove](#)

▼ Search for Guidelines

Select Unit Search



Click "Prepare for this review" to the right of the page



Enter a name to create a collection of materials for the review

Create a collection to help you prepare for the review. Once you create a collection, you can add materials while viewing guidelines for the review.

Prepare for Review ✕

Prepare for English Department Promotion Reviews / Department of English Language and Literature

To help you prepare for this review, create a collection. Once you create the collection, you can add materials for this review to the collection while viewing the guidelines for this review.

Collection Name

A page will appear where you can add materials to the collection while viewing the guidelines for the review

Materials > Collections >
English Dept. Promotion Review

Search
Enter keywords Filter Add Materials

You have not added any materials to this collection yet.
Add Materials

Preparing for your review

Here's how you can use Dossier to prepare for this review:

1. Add materials to this collection to meet the guidelines.
2. As you add materials, we suggest you tag the materials with the name of the requirement they fulfill.
3. When your review starts and you want to add materials to it, simply open this collection and filter by tag to find the materials for each requirement.

Guidelines
English Department Promotion Reviews
Department of English Language and Literature
[View instructions](#)

Candidate Documents

CV	1 required
CV	
Research Statement	1 required
Statement of Service	1 required
Publications	1+ required

Promotion Review Application
This application must be submitted to the President no later than June 1. All responses should refer to activities since your previous promotion or original appointment.
(This is a form that you will complete when your review begins.)

Click "View Instructions" to the right of the page to view instructions for review candidates (if any)

Guidelines

English Department Promotion Reviews
Department of English Language and Literature
[View Instructions](#)

Candidate Documents

CV	1 required
CV	
Research Statement	1 required
Publications	1+ required
Statement of Teaching Philosophy	1 required

This will display any instructions to candidates about assembling the review packet, and any other procedures, or policies at the

institution

English Department Annual Review ✕

Annual reviews are conducted through Interfolio, and are based on established criteria outlined specifically in your department handbook. By March 31, full-time faculty members submit an annual report on their activities. Tenured faculty review and evaluate each untenured assistant professor's annual report and accompanying documents. Peer reviewers also provide a candid evaluation of each faculty member's performance in the areas of teaching and service. Your online packet will contain all relevant materials needed to assess your progress.

[Done](#)

Add materials to the collection to meet the guidelines displayed on the right side of the screen

Creating a collection will open a page where you can view the guidelines for the review and add materials.

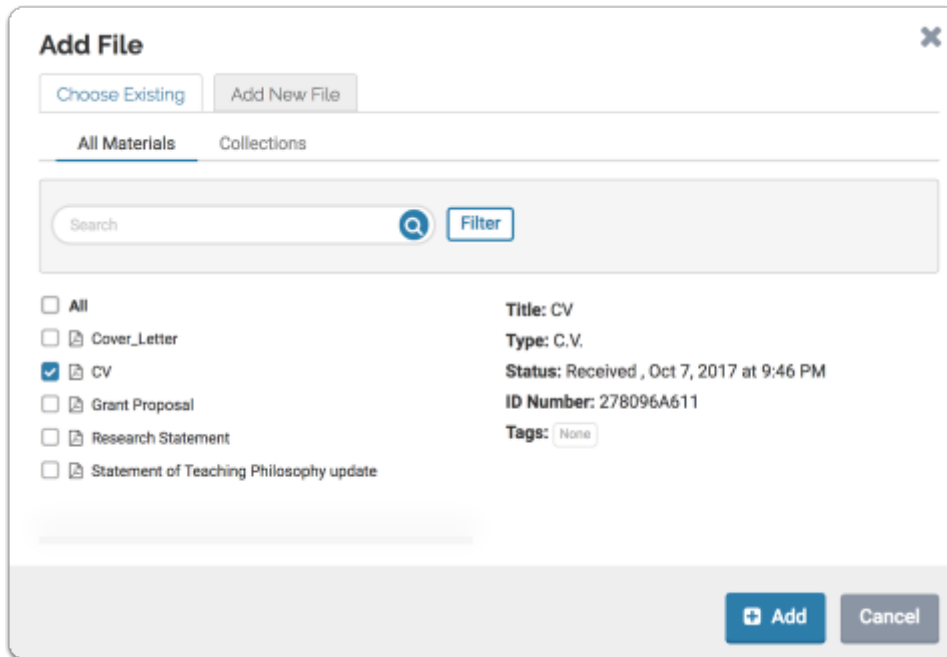
The screenshot shows the 'English Dept. Promotion Review' page. On the right side, there is a 'Guidelines' panel with a close button (✕). The guidelines include a list of 'Candidate Documents' with their required counts: CV (1 required), Research Statement (1 required), Statement of Service (1 required), and Publications (1+ required). Below this is a 'Promotion Review Application' section with instructions. In the main content area, there is a search bar, a 'Filter' button, and an 'Add Materials' button. A message states 'You have not added any materials to this collection yet.' Below this is a section titled 'Preparing for your review' with three numbered steps. Two red callout boxes with arrows point to the 'Add Materials' button and the 'Guidelines' panel.

Guidelines appear to the right

Click to add materials

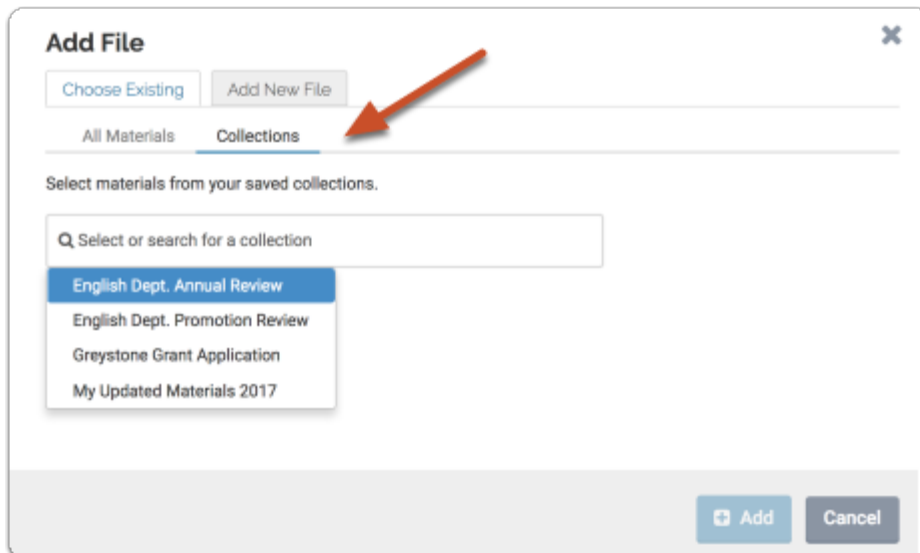
You can add materials already uploaded to your Dossier, or add

new files

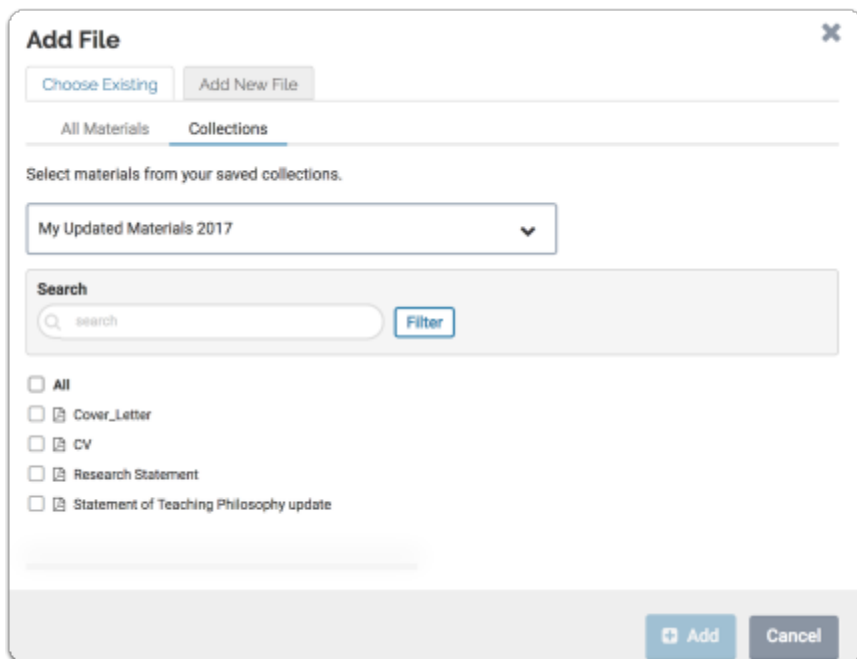


You can also add materials from a collection you've previously assembled

Open the collections tab and select a collection.

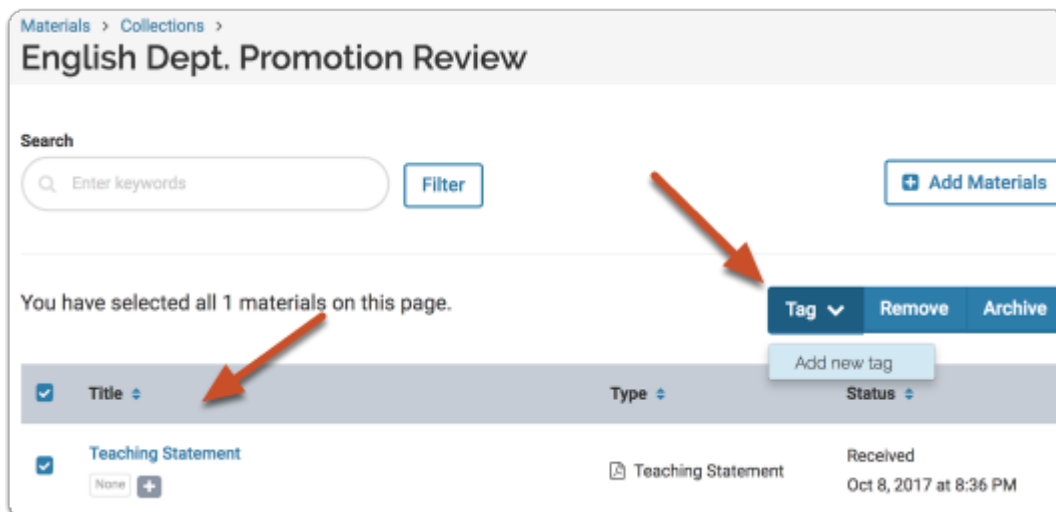


Add files from the collection to satisfy the guidelines for the review.

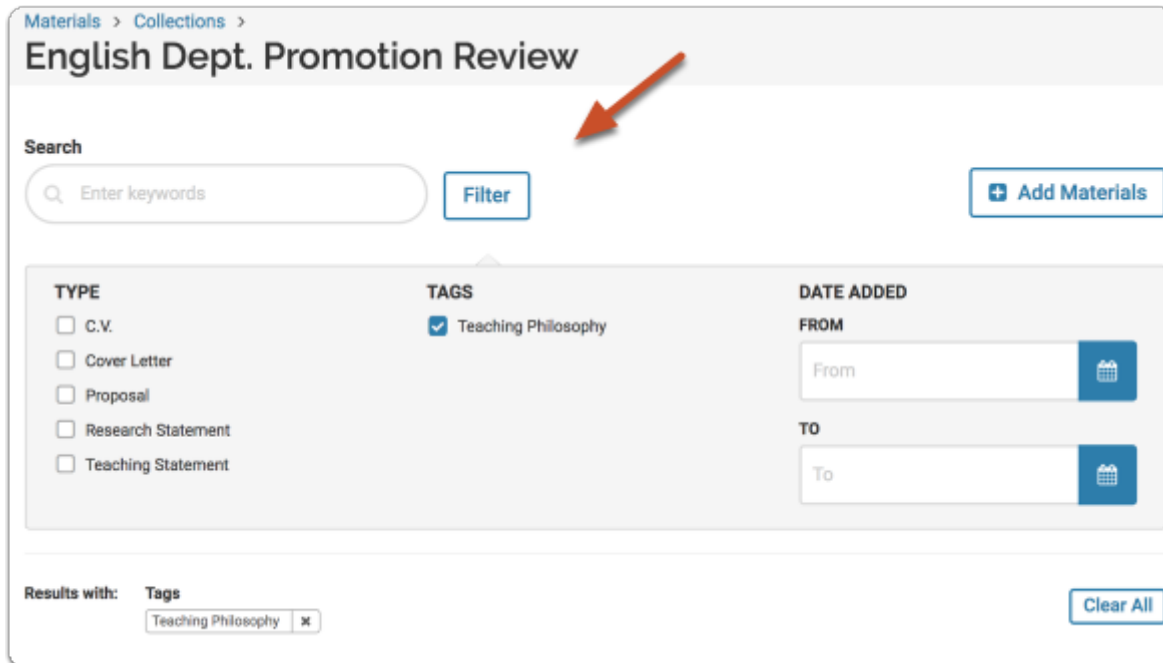


As you add materials, we suggest you tag them with the name of the guideline requirement they satisfy

To add a tag, select the document, click the "Tag" button, and enter your tag



When your review starts and you want to add materials, simply open this collection and filter by tag to find the materials for each requirement



Materials > Collections > English Dept. Promotion Review

Search: Enter keywords [Filter] [Add Materials]

TYPE

- C.V.
- Cover Letter
- Proposal
- Research Statement
- Teaching Statement

TAGS

- Teaching Philosophy

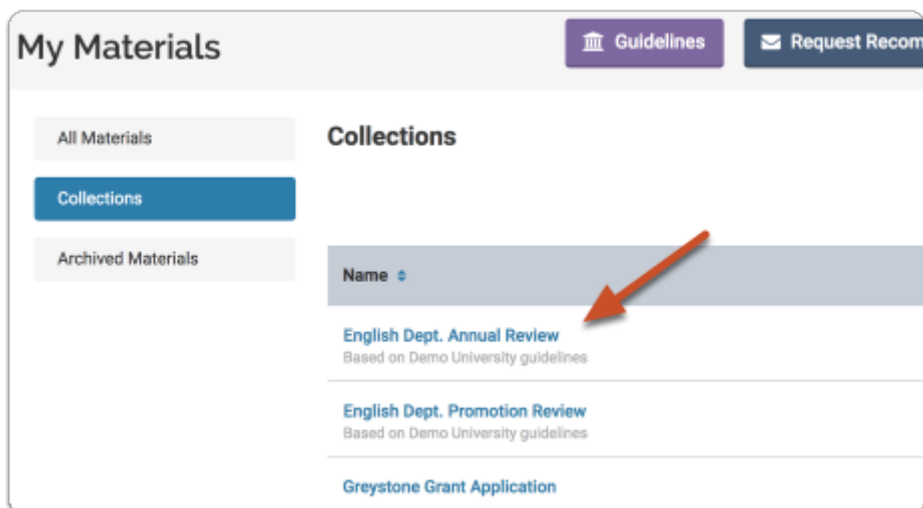
DATE ADDED

FROM: [From] [Calendar]

TO: [To] [Calendar]

Results with: Tags [Teaching Philosophy] [Clear All]

Collections you create based on guidelines will appear listed on the "Collections" tab of your Dossier materials page



My Materials [Guidelines] [Request Recom]

All Materials [Collections] Archived Materials

Collections

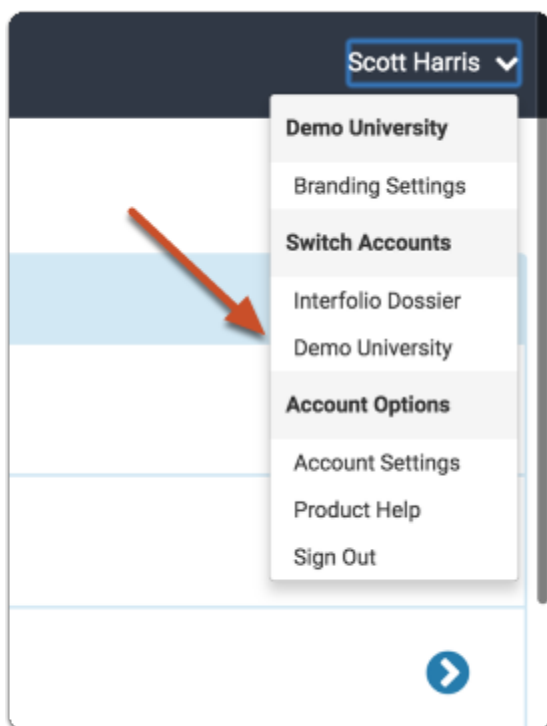
Name

- English Dept. Annual Review
Based on Demo University guidelines
- English Dept. Promotion Review
Based on Demo University guidelines
- Greystone Grant Application

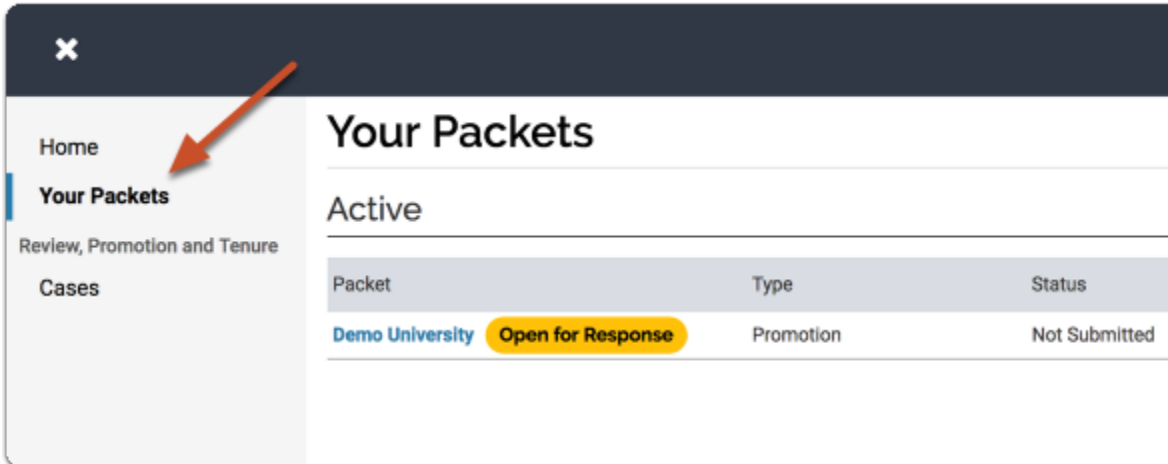
When it's time for your review, add materials from the guideline collection to the official review packet

Open your institutional account

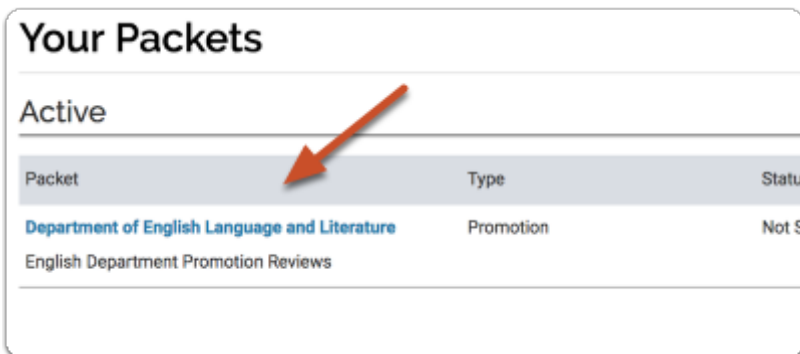
! You may need to open the account switcher in the right hand user menu and select to switch to your institutional account.



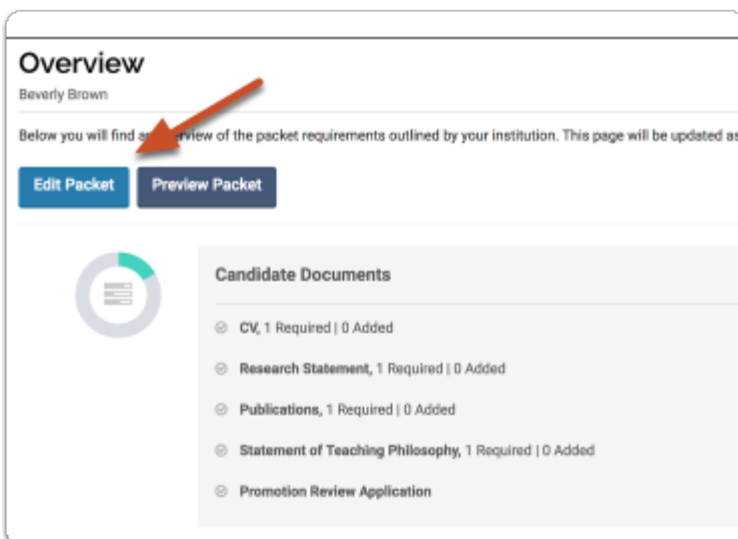
Select "Your packets" from the left hand navigation



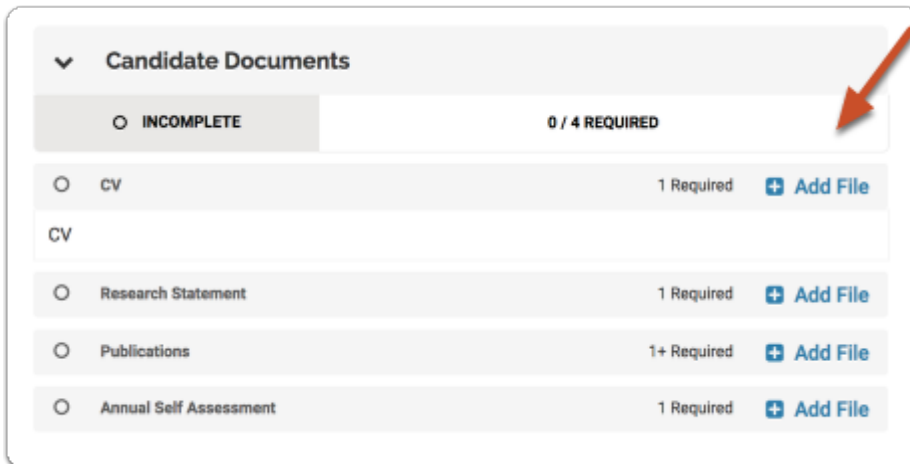
Open your packet



Click "Edit Packet"



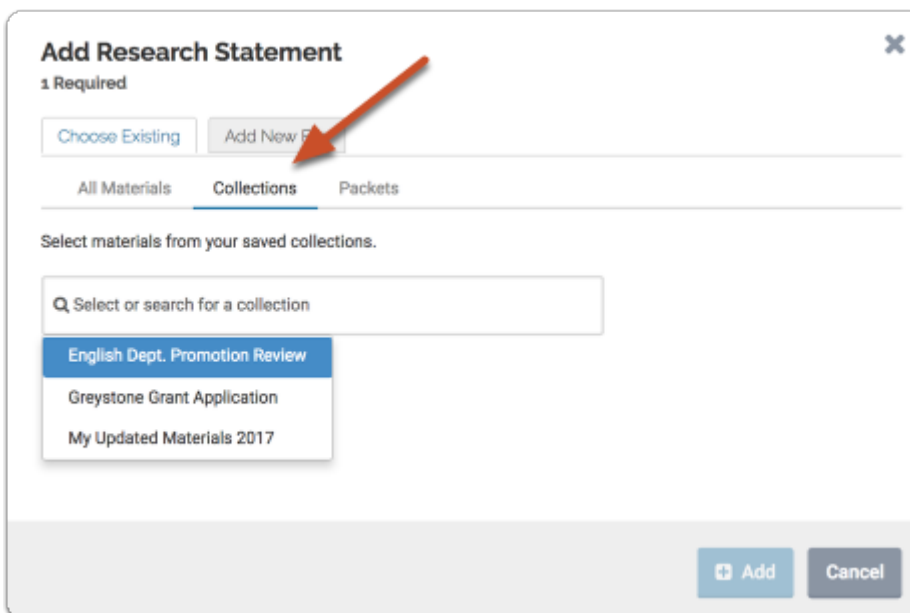
Click to add files



The screenshot shows a 'Candidate Documents' section with a dropdown arrow on the left. Below it, there is a progress bar indicating '0 / 4 REQUIRED'. A red arrow points to the right side of this bar. Below the progress bar, there is a list of documents, each with a radio button, a name, a requirement count, and an 'Add File' button:

Document Type	Requirement	Action
INCOMPLETE	0 / 4 REQUIRED	
CV	1 Required	+ Add File
Research Statement	1 Required	+ Add File
Publications	1+ Required	+ Add File
Annual Self Assessment	1 Required	+ Add File

Open the collections tab, and select the collection you created according to the guidelines



The screenshot shows a dialog box titled 'Add Research Statement' with a close button (X) in the top right corner. Below the title, it says '1 Required'. There are two buttons: 'Choose Existing' and 'Add New File'. A red arrow points to the 'Add New File' button. Below these buttons, there are three tabs: 'All Materials', 'Collections', and 'Packets'. The 'Collections' tab is selected and underlined. Below the tabs, there is a search bar with the text 'Select or search for a collection'. Below the search bar, there is a list of collections:

- English Dept. Promotion Review
- Greystone Grant Application
- My Updated Materials 2017

At the bottom right of the dialog box, there are two buttons: 'Add' and 'Cancel'.

Select the file to add

Add CV

1 Required

[Choose Existing](#) [Add New File](#)

All Materials **Collections** Packets

Select materials from your saved collections.

English Dept. Promotion Review

Search

search [Filter](#)

All CV Research Statement Statement of Teaching Philosophy update

Title: CV
Type: C.V.
Status: Received , Oct 7, 2017 at 9:46 PM
ID Number: 278096A611
Tags: None

[Add](#) [Cancel](#)

Rinse and repeat, and you will have your review packet done in no time!

Bene Therbrige

[Instructions](#)

Candidate Documents

INCOMPLETE 1 / 4 REQUIRED

CV 1 Required | 1 Added [Add File](#)

CV

CV Oct 7, 2017 [Edit](#) [Delete](#)

Research Statement 1 Required [Add File](#)

Publications 1+ Required [Add File](#)

Annual Self Assessment 1 Required [Add File](#)

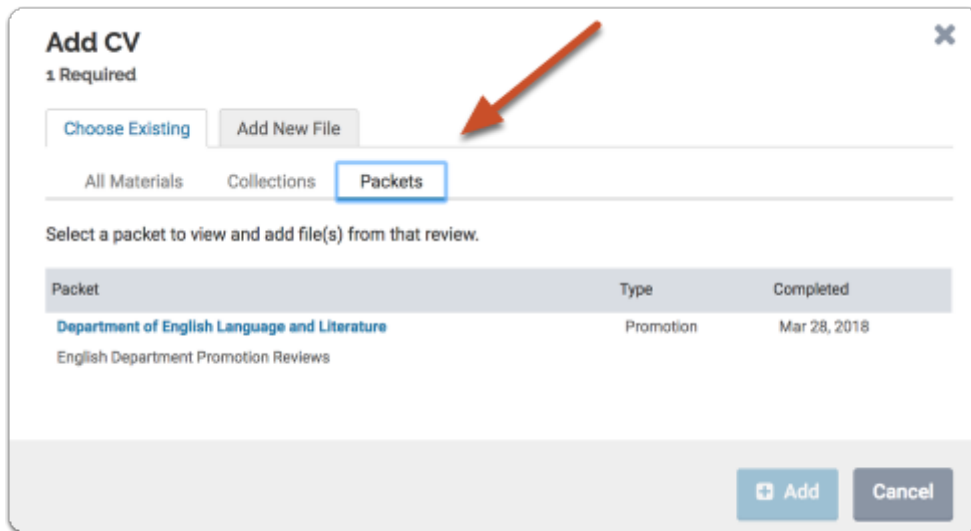
Progress

Candidate Documents

When you're ready to submit your packet, click "Review & Submit." All requirements must be met in order to submit a section. If your packet contains multiple sections, you can choose which sections you would like to submit at this time.

[Review & Submit](#)

You can also add files from previous packets



Add CV
1 Required

Choose Existing Add New File

All Materials Collections **Packets**

Select a packet to view and add file(s) from that review.

Packet	Type	Completed
Department of English Language and Literature English Department Promotion Reviews	Promotion	Mar 28, 2018

Add Cancel

Re-use Materials From Previous Packets in Current or Upcoming Reviews


Depending on your organization's subscription to Interfolio, some review candidates can import and re-use materials from past Interfolio Review, Promotion & Tenure packets when assembling a packet for a current or upcoming review.

So, if you are up for an important review (like tenure, or promotion to full professor), you can easily add materials you've previously submitted for routine reviews such as annual reviews etc. This can save you hours of tedious redundant work, and also cut down on potential errors when assembling your packet.

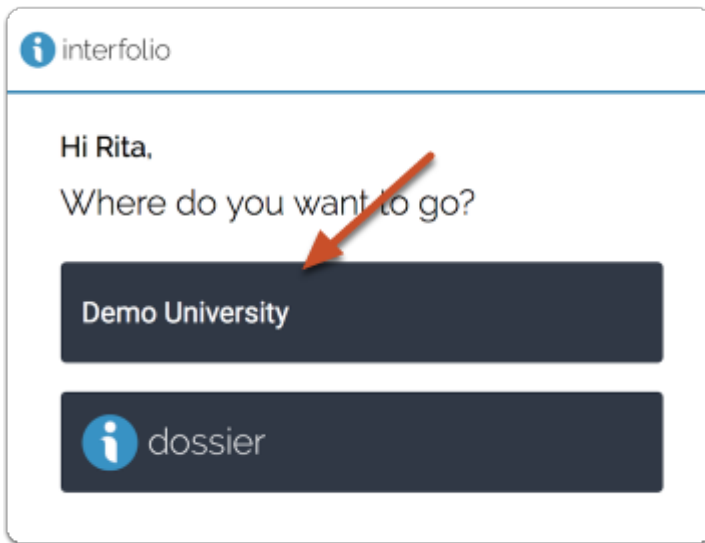
Administrators can also add materials from previous reviews:

We have also added the ability for authorized institutional users to pre-populate a candidate's case with suggested materials pulled from that candidate's past cases.

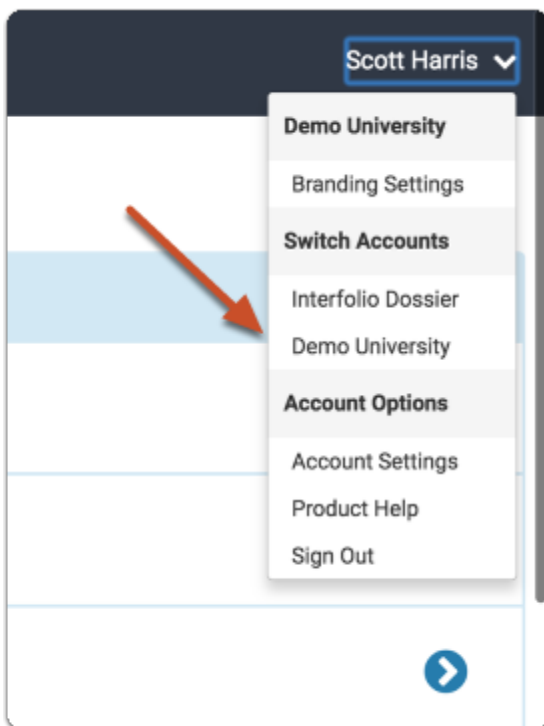
At the same time, the platform gives you, the candidate, the option to accept, edit, or remove those suggested materials.

 **Note:** This feature is currently limited to users who are provided a subscription to Interfolio by their institution through a Dossier Institution account.

Log in to Interfolio and navigate to your institutional account



! You may need to open the account switcher in the right hand user menu and select to switch to your institutional account.



Select "Your packets" from the left hand navigation

Home
Your Packets
Review, Promotion and Tenure
Cases

Your Packets

Active

Packet	Type	Status
Department of English Language and Literature Seminary Promotion Cases	Promotion	Not Submitted

Completed

Packet	Type	Responded
Historical Musicology Music Promotion Cases	Tenure	-

Open your packet

You will see a list of all packets with an indication of packet type, status, due date, or completion date.

Your Packets

Active

Packet	Type
Department of English Language and Literature Seminary Promotion Cases	Promotion

Completed

Packet	Type
Historical Musicology Music Promotion Cases	Tenure

Click "Edit" on the section where you want to add the file

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.](#)

Candidate Documents

Not Yet Submitted

Type	# Required	# Added
Additional Documents	0 required	0
CV	1 required	0
Personal Statement	1 required	0

Edit

Click "Add" next to the requirement for which you want to re-use previous packet materials

Overview Packet

Expand All Collapse All

Candidate Documents

Not Yet Submitted Unlocked

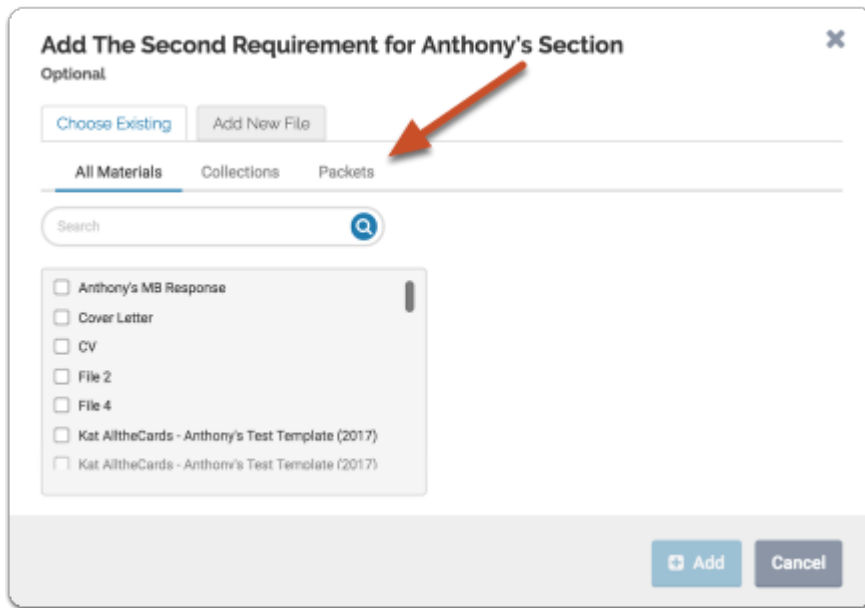
Submit 0 of 2 Required Files

CV 1 required, 0 Added

Add

No files have been added yet.

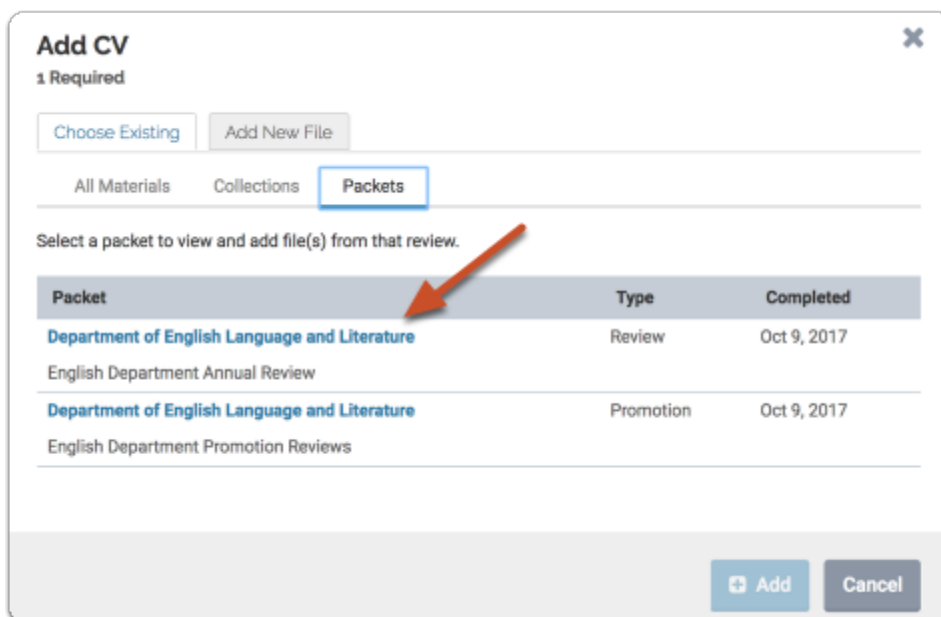
Click "Packets" on the "Choose Existing" tab



Select a packet from the list to view and add files from that review

If you have previously created a packet for a review, you will have the option to add materials from previous reviews to the new packet.

You will see a list of packets with packet type and date of completion displayed. Click the packet title to view and add files.



Select the files you want to add

All the materials you uploaded for the review will appear listed, as shown below.

Add CV ✕

1 Required

[Choose Existing](#) [Add New File](#)


[All Materials](#) [Collections](#) [Packets](#)

English Department Annual Review [Select a different review](#)






Department of English Language and Literature

Type: Review

Completed: Oct 9, 2017

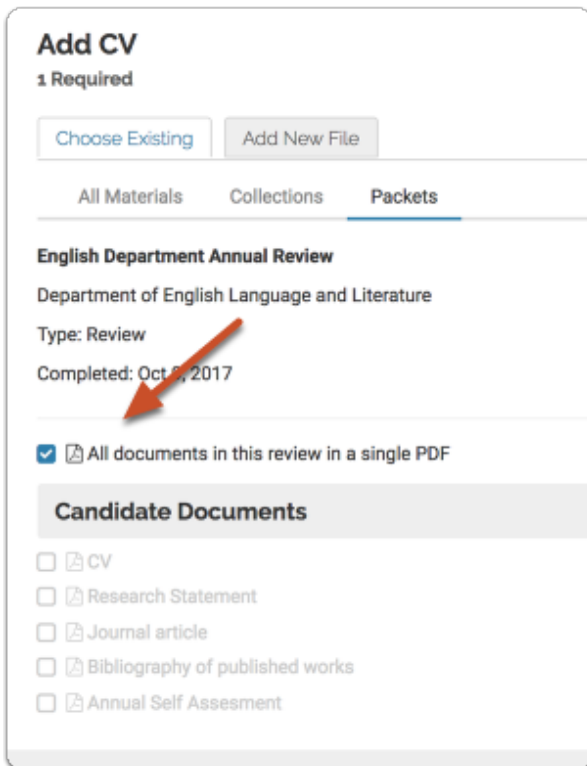
 All documents in this review in a single PDF

Candidate Documents

-  CV
-  Research Statement
-  Journal article
-  Bibliography of published works
-  Annual Self Assessment

[Add](#) [Cancel](#)

Check "All documents in this review in a single PDF" to add all files, or select the files you want to add to the new packet




Add CV
1 Required






[Choose Existing](#) [Add New File](#)

All Materials Collections **Packets**

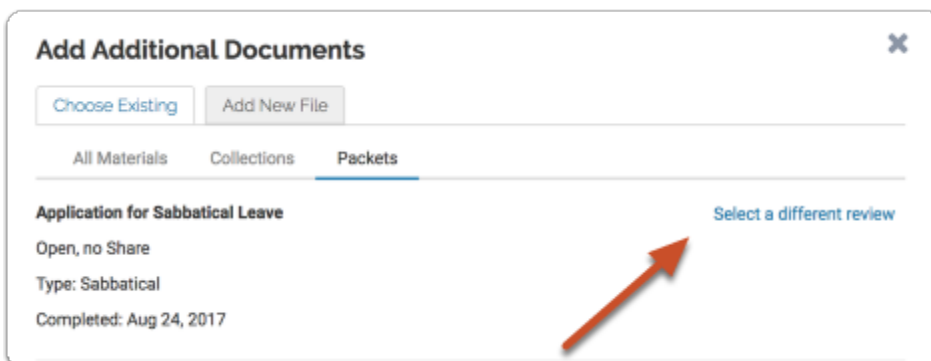
English Department Annual Review
Department of English Language and Literature
Type: Review
Completed: Oct 6, 2017

 All documents in this review in a single PDF

Candidate Documents

-  CV
-  Research Statement
-  Journal article
-  Bibliography of published works
-  Annual Self Assessment

If necessary, you can click "Select a different review" to reopen the list of packets for previous reviews



Add Additional Documents ✕

[Choose Existing](#) [Add New File](#)

All Materials Collections **Packets**

Application for Sabbatical Leave [Select a different review](#)
Open, no Share
Type: Sabbatical
Completed: Aug 24, 2017