FAU
COLLEGE OF SOCIAL WORK AND CRIMINAL JUSTICE
Florida Atlantic University

Interfolio
Frequently Asked Questions

1. What is Interfolio?

It is a holistic *product suite* that addresses the full academic cycle in a way that puts scholars' work at the center. It is a *secure online faculty information system* that allows you to upload, maintain and manage academic materials. This system simplifies the collection and organization of the documents specific to evaluations and other processes such as promotion and tenure and faculty activity reporting. It is electronically based and free to FAU faculty. In Interfolio, a candidate prepares a packet, which is the *collection of materials by which a candidate is being reviewed* (documents and other files). The packet is divided into sections which can be submitted independently of one another or submitted at one time. All materials submitted in the packet will be copied to the candidate's Dossier (a product feature included in Interfolio) for record keeping. *Cases* are created specific to a college template relative to the candidate's packet for submission such as review, promotion, and tenure, for example.

2. What is Dossier in Interfolio?

A product feature within Interfolio that allows users to collect and curate scholarly materials, request and receive confidential letters or recommendations, and prepare for evaluations. You can manage, store, prepare, and send letters, resumes, and other academic materials.

a. Dossier gives users the opportunity to collect and organize materials before they need to be used. The candidate does not need to wait until a Case has been opened by an administrator to start uploading files to Dossier and organizing their packet.
b. If you know you will be going up for RPT, SPE or applying for a sabbatical, for example, you may begin to collect and organize your files in Dossier following the university guidelines.
c. FAU does not have access to the contents, which belong to the individual.
d. Using Dossier is ***not*** mandatory.

3. How do I access Dossier?

a. Login in to Interfolio.com
b. Click on your name at the top right corner.
c. Select "Interfolio Dossier"

4. What are we using Interfolio for?
   While this is what we are currently using Interfolio for, there are plans to expand its use for other processes.
   a. Review, Promotion and Tenure (RPT)
   b. Sustained Performance Evaluation
   c. Sabbatical Applications
   d. Faculty 180

5. Is there a preferred search engine to use to access Interfolio?
   Yes. Please use Google Chrome.

6. How do I access Interfolio?
   a. Visit Interfolio.com.
   b. Select "Partner Institution"
   c. Florida Atlantic University
   d. Use FAU sign on credentials to login.

7. What is a "packet" in Interfolio.
   It is the collections of materials and documents that will be specific to the Case that will be opened on the candidate's behalf as it relates to the review for which they will be submitting the packet of materials for.

8. What is a Case in Interfolio?
   a. A Case is opened for a specific review and contains the candidate's packet of all materials collected for the candidate's review he/she will be submitting for. A Case is comprised of candidate and committee requirements.

9. Who opens a Case?
   a. A Case is opened for you in Interfolio by an administrator– for our college, someone from the Dean's Office.
   b. A Case may be opened, for one of these events: Review, Promotion and Tenure (RPT) and Sabbatical Applications.
   c. The Case will include sections and instructions for submitting your packet with all the required documents and forms.

10. How will candidates be notified that a Case has been opened on their behalf?
    a. Once the administrator opens a Case, an email via Interfolio will be sent notifying the candidate. The email will come from Interfolio's automated email system—it will not be sent from the administrator's FAU email account.

Spam email folders should be checked regularly if a candidate is waiting to receive notification of a case being opened for them.

11. How do I submit my packet for that Case?
    a. Login to Interfolio
    b. Go to Your "Packets" section.
    c. Click "edit packet".
    d. Scroll to bottom and click "review and submit."
    e. Review entire packet (or section by section) to make sure all required documents have been uploaded.
    f. Click "submit."
    g. You will see the confirmation page, stating the e-portfolio has been successfully submitted.

12. What happens if a candidate does not submit their packet for their Case?
    a. The status of the Case will be "With Candidate" status.

13. What happens next when a Case has been opened?
    a. If the candidate has uploaded files to Dossier for that event (RPT, SPE, Sabbatical) then they may log in to Dossier and submit their packet.
    b. The faculty member may opt to submit the entire packet if it is complete, or only certain sections may be submitted to be reviewed for completeness by the director of the school before submitting the entire packet. Please note, the entire packet must be submitted for review by the due date the College states in their timeline for that event.

14. What happens if the candidate realizes he/she needs to add documents to the packet after it has been submitted?
    a. The Case will be sent back to the candidate to add a document.
    b. All original documents must remain.
    c. A memo explaining what is different about the document being added.

15. Who reviews a Case?

    Each Case is associated to an event which has its own set of steps for a Case to be reviewed. In the event of RPT, the Case will follow these steps after the candidate has submitted their packet:

    a. Ready for Review (Director)
    b. School's P&T Committee Review
    c. College Level P&T Committee Review
    d. Dean's Review
    e. University P&T Committee Review
    f. Provost's Review
    g. President's Review

16. How is a Case moved to the next step or level of review?
    a. The Case will be moved forward in Interfolio by the person who currently has the Case. The person is either the director or the chair of a committee.

17. Can anyone move a Case forward?
    a. Only directors, committee chairs, deans, provost, move Cases forward. The faculty member for who the Case pertains to does not move it forward or backward.
    b. An administrator has the capability to move a Case, but they are not supposed to. In an extreme situation with proper documentation explaining why the administrator needs to move a Case forward, may do so.
    c. Interfolio is designed to maintain a fluid process without interruption and allows for certain activities that take place in a case to be tracked.

18. How are committee chairs and other reviewers notified about Cases?
    a. An automated Interfolio email with a link to login will be sent to the director or committee chair, or whoever is next in line to receive the Case for review (Dean, Provost, etc.).

19. What are the abilities of each of the different user roles in Review, Promotion and Tenure?

    A user's role determines their capabilities and permissions in RPT. These roles are:

    a. Committee Members: Have the most basic permissions within the system. They are assigned to a Case to:
        1. Review/download documents,
        2. Leave comments
        3. Complete required forms

       They cannot make any changes to the Case or upload documents.
    b. Committee Managers: Have all the abilities of committee members with a few added permissions, such as the ability to:
        1. Add documents (and fulfill document requirements).
        2. Move the Case forward or backward
        3. Email the candidate and committee members
        4. Record committee votes
        5. Add files to a Case
    c. Case Managers: Have the ability to:
        1. Create Cases
        2. Edit Cases within assigned unit
        3. Manage case-level settings and committees
        4. View Case details and packet materials
        5. View all closed cases at their level in the hierarchy

6. Case Managers cannot manage templates, view reports, or change account settings. Template Administrators and Unit Administrators have this ability.

d. Template Administrators: Have the ability to:
    1. Create and edit templates within assigned unit.

   Template Administrators cannot create cases, view reports, or manage any account settings.

e. Unit Administrators: Have the second highest level of access (Institutional Administrators have the highest access). These users have all the abilities of a Case Manager, plus the ability to:
    1. Create, manage, and monitor all Cases with the assigned unit.
    2. Accessing documents
    3. Emailing candidates and committees
    4. Moving a Case forward or backward
    5. Creating templates, forms, and Cases within assigned unit
    6. Control settings and permissions for users and committees within assigned unit.

20. Why can't the Case be moved forward even though the required documents have been uploaded by the committee?

    Documents may be uploaded on the Case Materials page, but the requirement must be marked as fulfilled on the Case Details page. If the requirement is not fulfilled on Case Details, the Case will not be able to move forward even if the necessary document was uploaded to Case Materials.

21. Why is the review committee unable to see documents uploaded by the candidate?

    The committee will only see documents in sections that have been submitted by the candidate. If the committee cannot see documents in the section/packet, it is likely that the candidate has not yet submitted. There are a couple of ways to confirm that this is the case.

    a. When looking at the Case list, the review step will be indicated beneath the candidate's name. If this says Case is with Candidate, this means that the candidate has not yet submitted any sections of their packet.
    b. Packet sections automatically lock after submission. If a candidate's case cannot be opened and there is a button that say Loc, then the section is unlocked. Unless a section has been manually unlocked post-submission, this indicates that the candidate has not yet submitted that section.
    c. Packet sections can be locked/unlocked for candidate editing by a Unit Administrator or Case Manager.

22. How and when are External Evaluations obtained for promotion and tenure?

Documents are added to the External Evaluations section using the Add File Button, or evaluations are requested through the External Evaluation section using the Request Evaluation button are uploaded as confidential documents that cannot be shared with the candidate, even when they are moved to another part of the packet.

It is possible however, to share non-confidential document, even when those documents have been moved into the External Evaluations Section.

a. External Evaluations are requested by the Director after the list of evaluators have been approved.
b. A request to solicit letters from evaluators can be done by the Director in the External Evaluations section clicking on Request Evaluation.
c. When sending out requests, the Director will be notified *only* of those external reviewers who have declined.
d. The Director will *not* receive an email from Interfolio of those who have accepted the request to submit a letter.
e. The Director will *not* be notified when the evaluator has uploaded their letter.

23. How are materials, such as committee review letters, shared with a Candidate?

Unit Administrators, Case Manager and Committee Managers (Chair) can share packet materials such as committee documents with the candidate and allow or disallow a candidate response or rebuttal to the shared material. This is useful when the candidate is given an opportunity to respond to a committee's decision, if applicable. When sharing case materials with the candidate, the candidate will get a notification that materials have been shared with them, and it will indicate if a response is allowed or required. They must log in to their account to view the shared files. It can be specified whether the candidate can submit a response to the shared files within the platform. There is also the option to let the candidate know the reason for sharing the file, and to se a deadline for a response.

a. When sharing materials with the candidate, ensure you are in the Case Materials tab, go the section where the file that you want to share is located, click on the checkmark box adjacent to the desired materials to be shared with the candidate.
b. Click the Shar button on the right-hand side of the blue toolbar above the Candidate Packet. Select With Candidate from the dropdown menu.
c. Compose a message to the candidate. It is recommended that you include a due date in your message otherwise the candidate will not see the due date until logging into their account.
d. Under the Share Files section, the files being shared will be listed.
e. Click the Add button to add more files, if applicable.
f. Click the Delete icon ("X") to remove shared files.
g. Click the Enable checkbox under File Response in the Details section on the right-hand side to allow the candidate to respond to the file.

h. If Enable is selected, the following fields will appear:
    - Message reason
    - Deadline: This is a hard deadline. The candidate will not be able to submit a response after the deadline set here.
i. Section for response: This will determine where the candidate response will appear once received. Responses to files shared with candidates can be set to post to any section when they come in.
    - No files will be directly attached to the email. The candidate will receive an email notification that files have been shared and will need to login to their account to view the shared files.
j. Click the Preview button to view message before sending.
k. Click Send when finished.
l. The candidate will receive an email message prompting them to log into their account and view the files.

24. What steps does Interfolio take to keep client data secure?

a. All users are authenticated via either Interfolio's username and password authentication or via SSO with their institution's Identity Provider.
b. At the server level, all administrative access is protected via multi-factor authentication. All traffic between Interfolio servers and the public internet is forced over HTTPS. Data is encrypted at rest and in transit.
c. Interfolio servers run a virtual private cloud. All web, application, and database servers are separated from the public Internet and have no public IP address. Private IP addresses are never disclosed to the Internet.

25. Does Interfolio offer account support for candidates, committee members and staff?

Anyone who has questions about an Interfolio product can contact their Scholar Services support team Monday through Friday by telephone at (877) 997-8807 from 9:00 AM to 6:00 PM EST

Terminology:

- Review, Promotion & Tenure (RPT): An Interfolio module used to facilitate the review process anytime a candidate submits materials for committee review.
- Cases: The lifecycle of the standardized review cycle, including candidate/committee requirements and associated documentation.
- Packet: The collection of materials uploaded by the candidate based on the requirements specified by the institution.
- Dossier: A tool for candidates to store and manage job, fellowship, and promotion or review documents in one place and subsequently upload to their packet.

- Committee: Groups of users that can review the candidate's Case at a give step of the review process.

Resources for Candidates:

- To learn more about Interfolio products: Dossier, Review, Promotion & Tenure (RPT), Faculty Activity Reporting (FAR) and more, visit: https://product-help.interfolio.com/

- For general information on Dossier click here: https://product-help.interfolio.com/en_US/about-dossier-accounts/dossier-quick-start-guide

- For more information on *A Candidate's Guide to Populating and Submitting a Packet using Interfolio for Review, Promotion and Tenure (RPT)* click here: https://product-help.interfolio.com/en_US/candidate/a-candidates-guide-to-interfolio-review-promotion-and-tenure

- Viewing and Responding to Files Shared by the Committee: https://product-help.interfolio.com/en_US/candidate/view-and-respond-to-files-shared-with-you-by-a-committee-rebuttal

- Reuse Materials from Previous Packets: https://product-help.interfolio.com/en_US/candidate/re-use-materials-in-current-or-upcoming-reviews