Interfolio Business Process Guide for Department/College Staff

Logging in to Interfolio

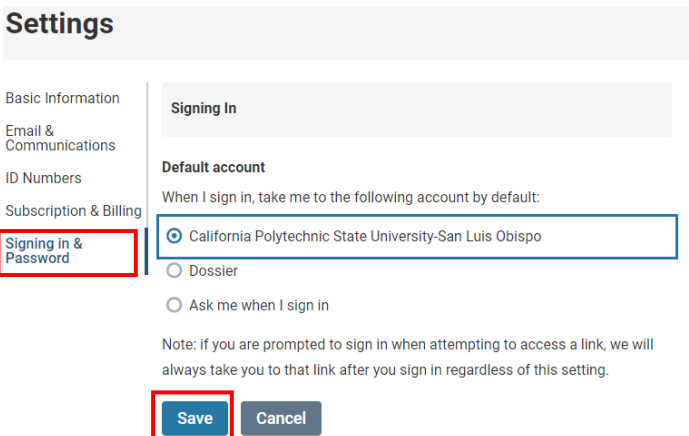| Instruction	Screenshot/Details
1) Login to the My Cal Poly Portal, and select "Interfolio" under "My Apps."	
2) When you login the first time you will be asked "Where do you want to go?" Select "Cal Poly" icon.	
3) To set "Cal Poly" as your default so you don't have to make a choice each time you login, select your name in the upper right-hand corner, then select "Account Settings."	
4) Select "Signing in & Password" from the left-hand menu, then select the radio button for "California Polytechnic State University-San Luis Obispo" as your default account, then select "Save."	

Setting the Department PRC for Each Candidate's Case

Instruction	Screenshot/Details

1) The committee called "COLLEGE-DEPT Department PRC" will be loaded by Academic Personnel with all tenured faculty in your department. Once DPRCs have been elected in by tenured and probationary faculty in your department, you will need to edit each candidate's DPRC in Interfolio.
 	
2) Open a candidate's case, select "Case Options" > "Edit Case."
	California Polytechnic State University-San Luis Obispo > Cases >
	
	Adam Beaker
	
	Send Case ⌄ Case Options ⌄
	   Edit Case
	Unit **Template** Email Candidate
	College of Science & Mathematics CSM-DEPT Promotion and Tenure Add Internal Section
	
	Case Materials Case Details View Activity Log
	     Close Case
	Search case materials by title
	
	[🔍] **Read Case**

3) Select "Case Review Steps" from the right-hand menu.	California Polytechnic State University-San Luis Obispo > Cases > Adam Beaker > **Case Summary** ‹ **Return to Case** Case Information Edit **Creating a Case** **Type** **Name** ① Case Information Promotion Adam Beaker **Unit** **Email** ② Candidate Requirements College of Science & Mathematics calpolytest+beaker@gmail.com ③ Internal Case Sections Internal Case Sections Edit ④ Case Review Steps Evaluation Reports and Rebuttal Statements ⑤ Case Summary

4) Find step 2 called "Department Peer Review Committee" and select "Edit."	California Polytechnic State University-San Luis Obispo > Cases > Adam Beaker >
	
	Case Review Steps 📍
	
	➕ **Add Step** **Additional Options** ⌄ **Creating a Case**
	
	① Case Information
	① WPAF Collection Period (Current Step) Edit | Delete ② Candidate Requirements
	    👥 CSM-DEPT Coordinator (2) ③ Internal Case Sections
	    ⊘ No Instructions ⊘ No Required Documents ④ Case Review Steps
	
	⑤ Case Summary
	② Department Peer Review Committee Edit | Delete
	    Due Date: Nov 20, 2020
	    👥 CSM-DEPT Department PRC (4)
	    ⊘ No Instructions ⊘ No Required Documents

5) On the "Edit Details" page, you will see the standing committee assigned to this step and a list of all of the tenured faculty in your department.

   a) For tenured faculty not serving on this candidate's DPRC, select the recuse symbol ⊘ next to their name. Once you recuse someone they will have a "Recused" icon next to their name.

   b) If you accidentally recuse the wrong person, simply select the plus symbol ➕ next to the recused person.

   c) You can also select the star symbol next to a committee member's name to make them a "committee manager" in Interfolio. This function can be used to identify the committee chair. However, we do not recommend using this function since the department staff are uploading and sharing the evaluation with candidates, and moving the case forward and backward, and unlocking/locking sections as necessary.

6) Once you are done making edits, your changes are automatically saved. You can easily return to your list of cases by selecting "Cases" at the top of the page and select the next candidate that you wish to edit the DPRC for.

Edit Details

Step Details (Step 2 of 13)

Step Name
Department Peer Review Committee

Due Date
Nov 20, 2020

Edit Step Details

7 people can administer the case at this step.

0 administrators are recused at this step.

Manage

Reviewers

Add Committee

⌄ **CSM-DEPT Department PRC**
Standing Committee (3)

Options ⌄

Manage Members   Instructions   Required Documents   Required Forms   Settings

👥 3 Members

JE	Jaime Escalante calpolytest+escalante@gmail.com	★ ⊘
MM	Maria Montessori calpolytest+montessori@gmail.com	☆ ⊘
NT	Nikola Tesla calpolytest+tesla@gmail.com	☆ ⊘
AB	Adam Beaker (Recused) calpolytest+beaker@gmail.com	☆ ➕

Add Members

Return to Case Review Steps

Note: As the "committee manager," the identified "starred" DPRC member can now move the case forward and backward, unlock and lock case sections, and share evaluations with the candidate. However, if you have different committee chairs for each candidate's committee then this feature is pointless because they become a committee manager on all cases even when they are selected from within a specific candidate's case. Also, we believe that sometimes committee managers accidentally unlock case sections when they should remain lock due to having less familiarity with the system.

Sending Case Forward from WPAF Collection Period to First Level of Review	
Instruction	**Screenshot/Details**
1) Once the candidate has submitted their case, the department coordinator will receive an email notification from Interfolio because the department coordinator is assigned to the first review step called the "WPAF Collection Period." The email will be from noreply@interfolio.com and the subject will be "A new case has been submitted." **Note:** The department coordinator will receive an email even if the candidate only submit one section of their case. This is why it is important to follow the next steps before automatically moving the case forward. **Note:** If the candidate submits early (prior to the WPAF due date), best practice is to hold off on moving the case forward until the day after the WPAF due date.	A new case has been submitted noreply@interfolio.com Fri 11/20/2020 2:03 PM To: Korrine Cordero <calpolytest+cordero@gmail.com>; Cassie A. Stevenson **CAL POLY** Adam Beaker's case is available for review. SIGN IN The candidate has submitted their case and it is now available for your committee to review. Powered by Interfolio | Support
2) Login to Interfolio, search for and open the candidate's case.	Cassie Stevenson ▾ **CAL POLY** California Polytechnic State University-San Luis Obispo › Home Review, Promotion and Tenure **Cases** **Create Case** ▾ Cases Search cases Templates adam beaker 🔍 Filter Administration Reports ☐ Users & Groups 1 of 1 cases Filtered By: Active Cases ✕ Name ▾ Type ⇕ Template Name ⇕ Status ⇕ ☐ **Adam Beaker** Promotion CSM-DEPT Promotion and Tenure ● Test Case College of Science & Mathematics Step 1 of 13: WPAF Collection Period

3) Once you are inside the candidate's case, select "Expand All" from the blue menu bar to be able to see the contents within each section.	California Polytechnic State University-San Luis Obispo > Cases > **Adam Beaker** [Send Case ▾] [Case Options ▾] **Unit** **Template** **Status** College of Science & Mathematics CSM-DEPT Promotion and Tenure ● Test Case change Case Materials Case Details Search case materials by title [ ] [🔍] [Read Case] ☑ [⊕ **Expand All**] [⊖ Collapse All] ✉ Share ⚙ Settings ≡ Move

4) Scroll down to the "Candidate Packet" area.
 	
  a) Quickly scroll through all of the sections and take note of any unlocked sections. Sections that are locked have this **Locked** icon to the right of the section name. Sections that are unlocked have this **Unlocked** icon to the right of the section name.
 	
  b) If you notice an unlocked section, check whether this section is "required" or "optional." Before moving the case forward, if there are required sections without documents, you should notify the candidate.
 	
  c) It is also a good idea to glance through the file names that have been inserted into each section and try to identify candidate uploading errors. For example, if you notice a document titled "CV" was uploaded under the "Professional Plan" section, then you may want to notify the candidate of this potential error before moving the case forward.
	Candidate Packet
	Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.
	
	⌄ Electronic Personnel Action File (ePAF) **Locked** ❓ [Unlock]
	The Electronic Personnel Action File (ePAF) is an electronic record of employment and personnel information that is maintained by the college dean or equivalent supervising administrator. Candidates are unable to add or delete materials to this section, but they should review this file for accuracy. If candidates discover any inaccuracies, they should notify their college dean or appropriate administrator before the deadline to submit the Working Personnel Action File.
	
	Additional Documents optional [Add File]
	No files have been submitted.
	
	⌄ Index of Materials **Locked** ❓ [Unlock]
	Index of Materials 1 required [Add File]
	
		Title	Details	Actions

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☐ Index 2019	Submitted by Adam Beaker Nov 20, 2020	Edit | ⌄ CV **Locked** ❓ [Unlock] Current CV 1 required [Add File] | Title	Details	Actions
---	---	---
☐ CV	Submitted by Adam Beaker Nov 20, 2020	Edit | ⌄ Summary Table of Grades Assigned **Unlocked** ❓ [Lock] Summary Table of Grades Assigned 1 required [Add File] No files have been submitted. ⌄ Summary Table of Student Evaluation Results **Locked** ❓ [Unlock] Summary Table of Student Evaluation Results 1 required [Add File] | Title	Details	Actions
---	---	---
☐ Summary Table of Student Evaluations- 2017-18	Submitted by Adam Beaker Nov 20, 2020	Edit	 Note: The "Electronic Personnel Action File (ePAF)" and "Student Evaluation Reports" sections should remain locked at all time. The candidates should not have access to edit the contents of these sections.

5) If the candidate submitted their packet early and would like to edit the contents of their submission, you may unlock sections for them only if they request to make edits prior to the WPAF due date.	
• To unlock a section prior to the WPAF due date, simply select the "Unlock" button next to the section names they wish to have access to edit.	
• Inform the candidate when the section has been unlocked. The section will automatically lock again when the candidate resubmits.	
Note: If the candidate would like to insert materials after the WPAF deadline, this must be approved by the College Peer Review Committee and must be limited to items that became accessible after the deadline.	
6) On the day after the WPAF due date, check the cases that were submitted for completeness.	Here is an example of an unlocked but optional section that should be locked before moving the case forward.
• If the only "unlocked" sections are for "optional" materials, then lock these sections by hitting the "Lock" button before moving the case forward.	
• If there are "unlocked" sections for "required materials, then contact the candidate outside of Interfolio to notify them that their WPAF is incomplete.	

7)	Ensure all of the sections are **Locked** before moving the case forward. Once all of the sections are locked, then you may forward the case to the first level of review by selecting "Send Case" > "Forward to _____."	California Polytechnic State University-San Luis Obispo > Cases > **Adam Beaker** **Send Case ∨** **Case Options ∨** Forward to Department Peer Review Committee **Unit** **Template** College of Science & Mathematics CSM-DEPT Promotion and Tenure ● Test Case change Case Materials Case Details Search case materials by title [🔍] **Read Case**
8)	The "Send Case Forward" window will appear where you may draft a notification to the level of review gaining access the WPAF.	**Send Case Forward** ✖ Great job! You're sending the case forward to the next step, Department Peer Review Committee. The following reviewers will lose access to the case: CSM-DEPT Coordinator | 2 members The following reviewers will gain access to the case: CSM-DEPT Department PRC | 4 members
	• Use the automated message or use Sample #1 from the "Email Template for Interfolio" guide that is available on [Academic Personnel's Interfolio page]().	☑ Send a message to the reviewers gaining access. If recipients respond to this message, their response will come directly to your email inbox. **Subject *** Case Ready for Review - Adam Beaker
	• I like to use the subject of "Case Ready for Review – CandidateFirstName CandidateLastName"	**Message *** 📋 📋 | **B** *I* *I_x* | ⠿ ⠿ ⇥ ⇤ | ⚭ ⚬ | 🖼 Ω Dear DPRC, This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in. Best, Cassie Stevenson
9)	When you are happy with your message to the reviewer(s), select "Continue" to forward the case and send the email notification.	body p 👁 **Preview** **Continue** **Cancel**

Setting up the AP109 Form

Instruction	Screenshot/Details
1) New forms have been uploaded to [Academic Personnel's forms page](#) under "Evaluations". There is now a page break just before the signatures causing signatures 1-25 to land on a separate page and 26-35 to land on yet another page. Note: The maximum number of recipients Adobe Sign allows at once is 25, so if you ever have a DPRC that has more than 25 members, you will need to route to members 1-25 and 26-## separately.	By signing below, I agree with the above evaluation and acknowledge my evaluation resulted from thorough review of the Personnel Action File (PAF), including student evaluations, and the Working Personnel Action File (WPAF). My signature also certifies that I did not copy, share or reproduce the documents and materials contained within the candidate's PAF or WPAF. 1 ___, Chair Date 14 ___ Date 2 ___ Date 15 ___ Date 3 ___ Date 16 ___ Date 4 ___ Date 17 ___ Date 5 ___ Date 18 ___ Date 6 ___ Date 19 ___ Date 7 ___ Date 20 ___ Date 8 ___ Date 21 ___ Date 9 ___ Date 22 ___ Date 10 ___ Date 23 ___ Date 11 ___ Date 24 ___ Date 12 ___ Date 25 ___ Date 13 ___ Date AP109 – DPRC (10/2020) Page 3 26 ___ Date 31 ___ Date 27 ___ Date 32 ___ Date 28 ___ Date 33 ___ Date 29 ___ Date 34 ___ Date 30 ___ Date 35 ___ Date

|	
2) In order for the form field template to work, the DPRC will need to use the new versions of the AP 109 forms. 3) Enter the DPRC member names into the form fields on the Word Document in the numbered ordered (top-left to bottom-left, and top-right to bottom-right).	By signing below, I agree with the above evaluation and acknowledge my evaluation resulted from thorough review of the Personnel Action File (PAF), including student evaluations, and the Working Personnel Action File (WPAF). My signature also certifies that I did not copy, share or reproduce the documents and materials contained within the candidate's PAF or WPAF. In the example above, Cassie Stevenson is participant 1 (chair), Lindsay Howell is participant 2, Melissa Bodin is participant 3 and Sharon Arnold is participant 4.

Route the Complete AP 109 using Adobe Sign "Field Templates"

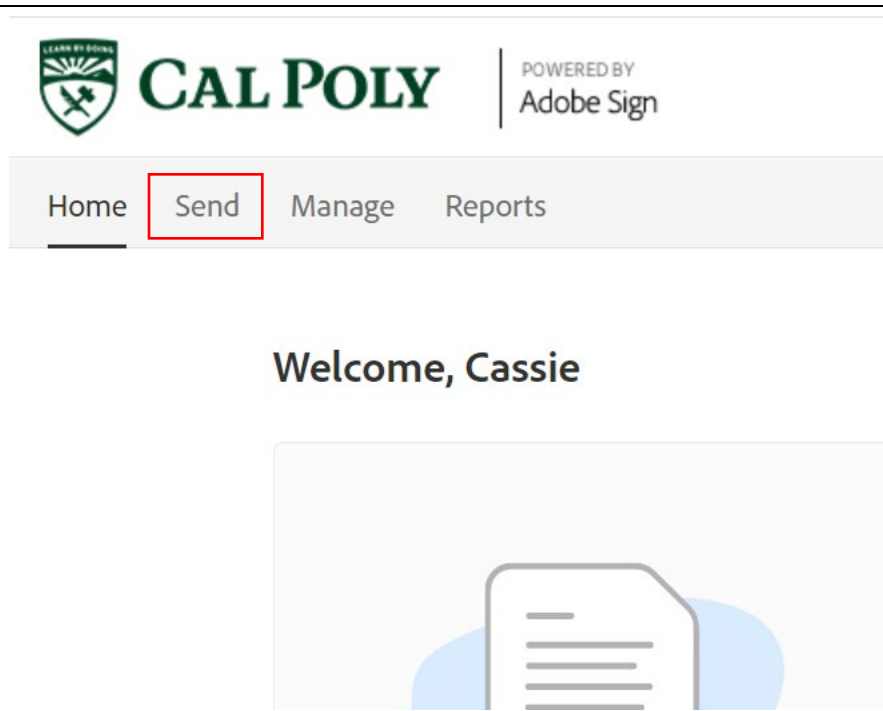| Instruction	Screenshot/Details
1) Once the DPRC returns the evaluation to you, check that the formatting of the document hasn't been messed up (e.g., the signatures are still breaking onto separate pages, second to last page is 1-25 and last page is 26-35). 2) Login to your Cal Poly Portal, select "Adobe Sign" under "My Apps."	
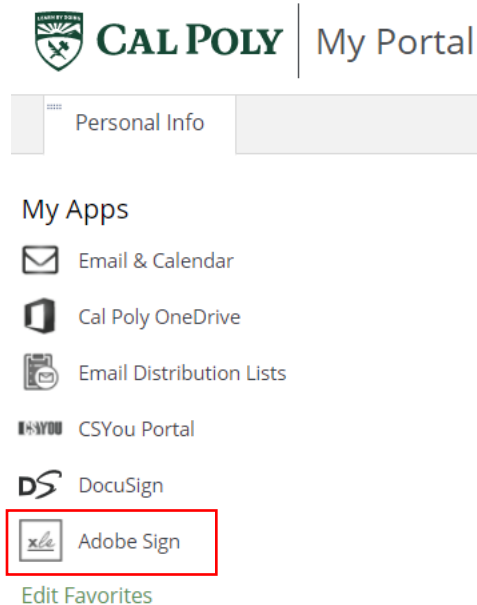
3) Once Adobe Sign opens, select "Send" from the top-menu bar.	**CAL POLY** POWERED BY Adobe Sign Home Send Manage Reports **Welcome, Cassie**	
4) On the next page, enter the DPRC member names in the same numbered order, which they appear on the AP 109 form. See example in next column. **5)** After you add the DPRC members as participants in the same order that they appear on the AP 109, you may toggle the switch to "Complete in Any Order". This will allow all the DPRC members to sign simultaneously. **Note:** When you change to "Complete in Any Order" the numbers on the left side go away.	Example AP 109: 1 Cassie Stevenson, Chair 2 Lindsay Howell 3 Melissa Bodin 4 Sharon Arnold Select "Complete in Any Order":	"Send" Adobe Sign Page: **Recipients** Complete in Order ⬤ Complete in Any Order 1 csteve03@calpoly.edu 2 lmhowell@calpoly.edu 3 mbodin@calpoly.edu 4 sarnold@calpoly.edu 5 Enter recipient email

	Recipients Complete in Order ⬤ Complete in Any Order ✒⌄ csteve03@calpoly.edu ✒⌄ lmhowell@calpoly.edu ✒⌄ mbodin@calpoly.edu ✒⌄ sarnold@calpoly.edu ✒⌄ Enter recipient email
6) Next add the completed AP 109 form under "Files" by either dragging and dropping or selecting the "Add Files" link. **7)** Adjust your "Completion Deadline" and "Message." **8)** Then select "Next" when you are ready.	**Message** AP109 DPRC - Tester McTesterson Please review and complete AP109 DPRC - Tester McTesterson. **Files** — Add Files ▤ AP109 DPRC - Tester McTesterson.docx ✕ Drag More Files Here **Options** ❓ ☑ Completion Deadline 90 days to complete this agreement. Agreement expires after Jan 11, 2021. ☐ Set Reminder Recipients' Language English: US ⌄ ☑ Preview & Add Signature Fields **Next**
9) On the next page, scroll down to where the signatures start. Then select "Field Templates" in the upper-left corner. **10)** Select the drop-down message and choose the appropriate shared template. • If you are gathering signatures 1-25, select "AP109 Committee Signature Page 1-25 (shared by Cassie Stevenson)". • If you are gathering signatures 26-35, select	Home Send Manage Reports Field Templates ⌄ ⬚ ⬚ ⬚ ⬚ ⬚ ⬚ ⬚ ⬚ ⬚ ☐ Relative to Page Navigate to... ⌄ 🗂 50 By signing below, I agree with the above evaluation and acknowledge my evaluation resulted from thorough revie Personnel Action File (PAF), including student evaluations, and the Working Personnel Action File (WPAF). My si also certifies that I did not copy, share or reproduce the documents and materials contained within the candidat or WPAF. 1 Cassie Stevenson, Chair _____ Date ___ 14 _____ Date 2 Lindsay Howell _____ Date ___ 15 _____ Date

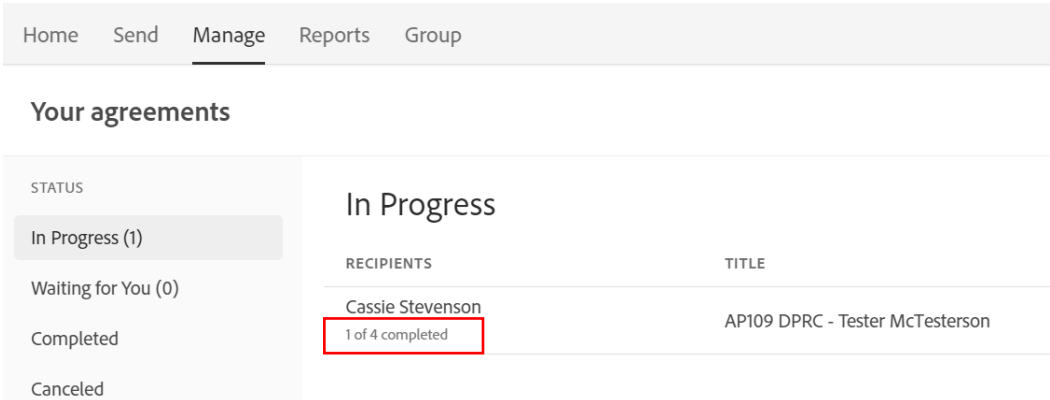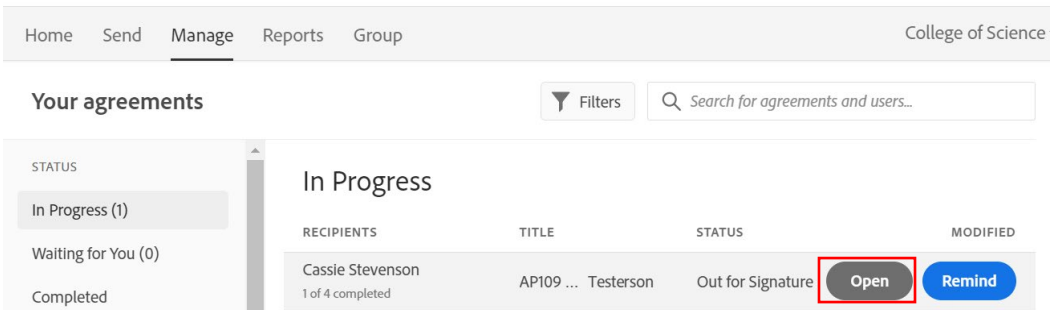|	
"AP109 Committee Signature Page 26-35 (shared by Cassie Stevenson)".	
11) Then select the page number the signatures appear on, and choose "Apply."	
12) Now the signature field and date field for each DPRC member should automatically populate on their respective lines. Verify that each recipient's fields are appearing above their name by selecting a name under "Recipients" and confirming that the signature fields that are highlighted yellow appear above that person's name on the form.	**When Cassie Stevenson is selected the highlighted cells are correct:** **When Lindsay Howell is selected the highlighted cells are correct:**
13) When you are ready to route for signature select "Send."	
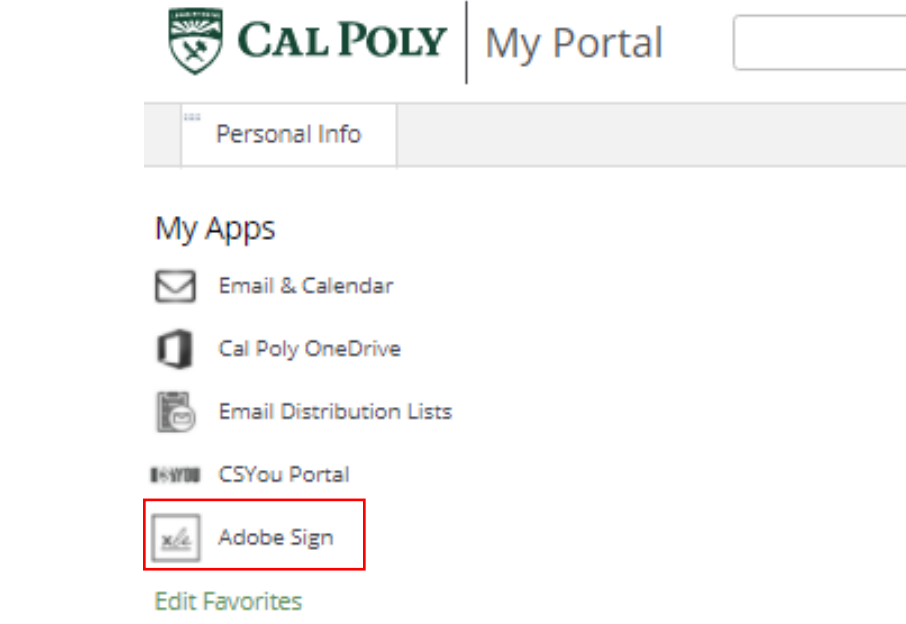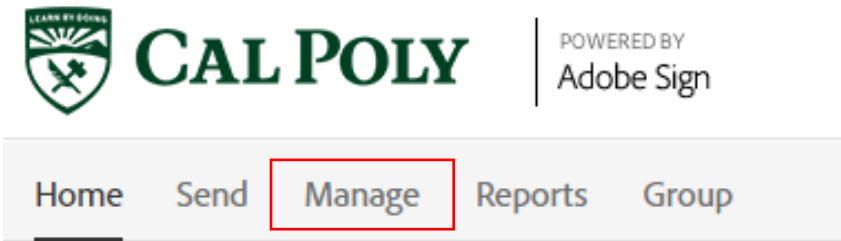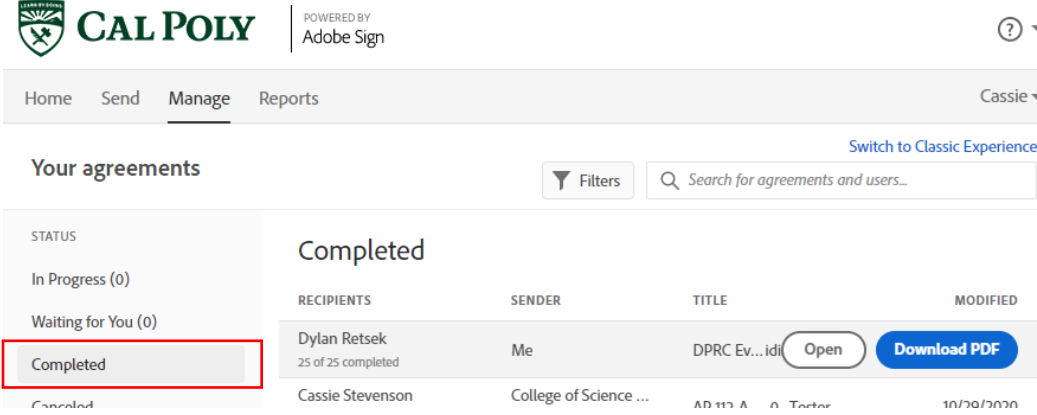
Monitor Signatures from "Manage" Tab	
Instruction	**Screenshot/Details**
1) If you need to monitor who has signed, you can see that by going to the "Manage" tab and looking at the number of total signers that have signed so far.	Home Send Manage Reports Group **Your agreements** STATUS In Progress (1) Waiting for You (0) Completed Canceled **In Progress** RECIPIENTS — TITLE Cassie Stevenson — AP109 DPRC - Tester McTesterson 1 of 4 completed
2) If you select "Open," next to the AP 109 form that you routed and then you can see which recipients have signed and/or viewed the form. **Note:** • Lindsay Howell shows as "Signer viewed," which means she has opened the agreement but hasn't signed yet. • Melissa Bodin shows as "Signed" with a green checkmark meaning she has signed. • Cassie Stevenson and Sharon Arnold show as "Signature requested," meaning they have not viewed or signed but they were sent a notice.	Home Send Manage Reports Group College of Science **Your agreements** Filters Search for agreements and users... STATUS In Progress (1) Waiting for You (0) Completed **In Progress** RECIPIENTS TITLE STATUS MODIFIED Cassie Stevenson AP109 ... Testerson Out for Signature Open Remind 1 of 4 completed **4 Recipients (1 Completed)** ● Cassie Stevenson Signature requested on Oct 13, 2020 ● Lindsay Howell Signer viewed on Oct 13, 2020 ● Melissa Bodin ✓ Signed on Oct 13, 2020 ● Sharon Arnold Signature requested on Oct 13, 2020

Removing Security/Encryption from Adobe Signed Document	
Instruction	**Screenshot/Details**
1) Once your AP 109 has all the signatures and is ready to be uploaded into Interfolio. You must download it Adobe Sign. Select the "Adobe Sign" link from under "My Apps" in your Cal Poly Portal.	
2) Once Adobe Sign is open, select "Manage".	
3) Then select "Completed" on the left-hand menu bar. 4) Hover over the completely signed evaluation/AP 109 and select "Download PDF."	
5) On a Mac, open your Finder and select	**Mac**

"Downloads." Then find the document you need to unsecure. On a Windows computer, open your file explorer window and select "Downloads." Then find the document you need to unsecure. Right click the document and select "Open with" then select "Google Chrome." We want to force the document to open in the Google Chrome web browser instead of opening in Adobe Acrobat or Preview.	 **Windows**
6) Once the secured PDF is open in Google Chrome, the steps are the same for both a Mac and Windows computer user. Select the printer icon in the upper right-hand corner on the dark grey/black menu bar that appears when you hover your mouse there.	
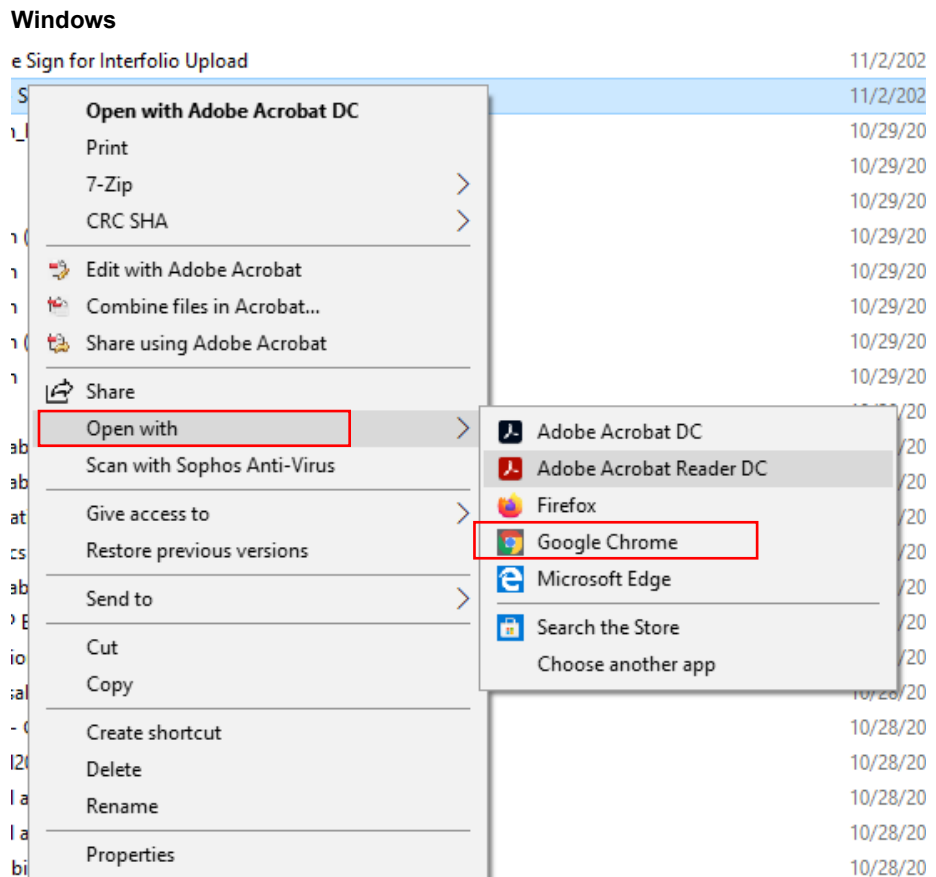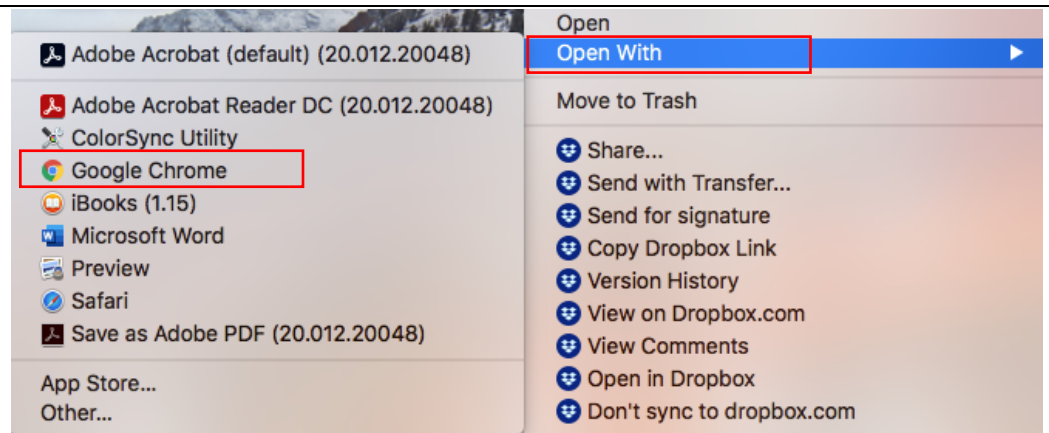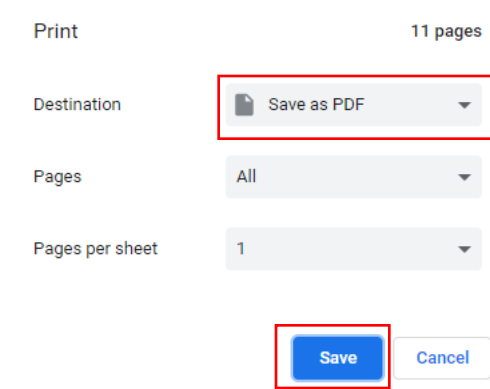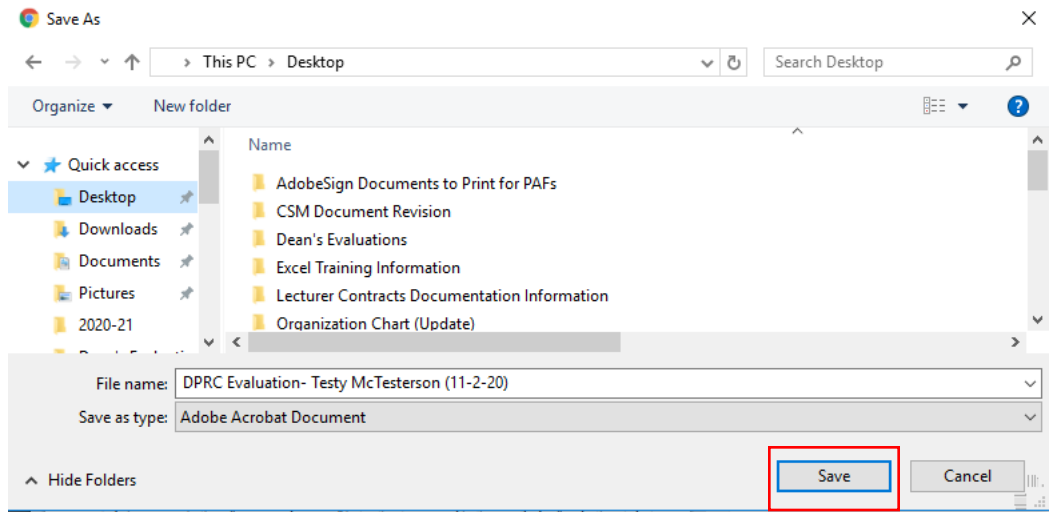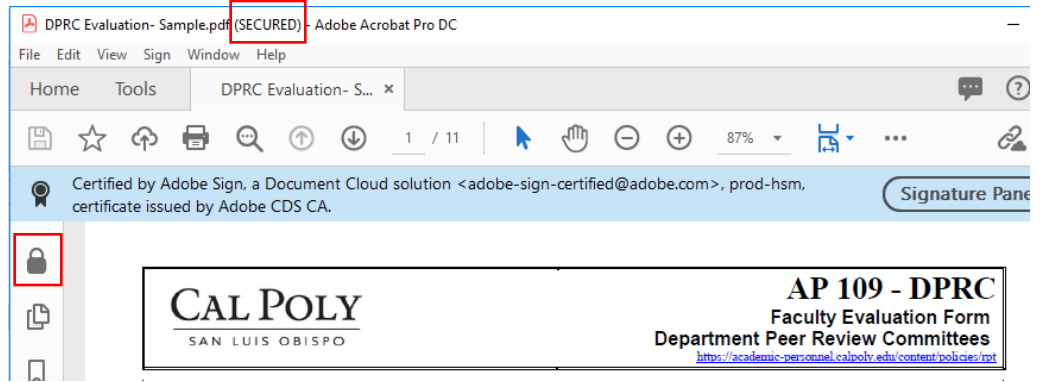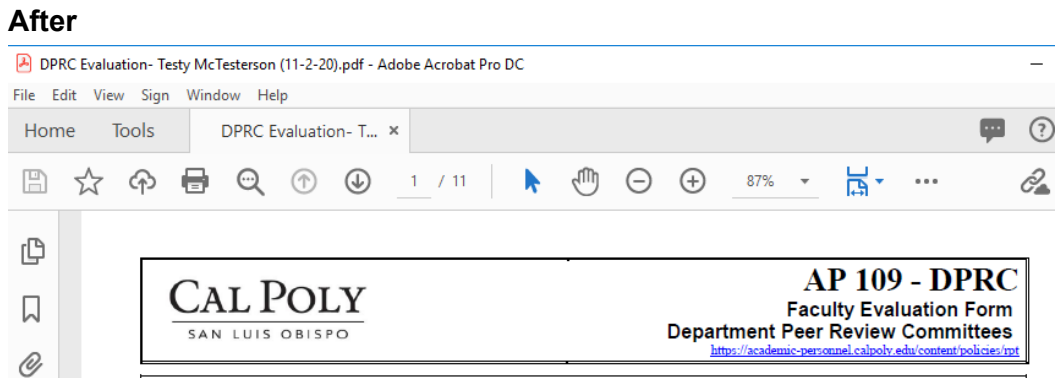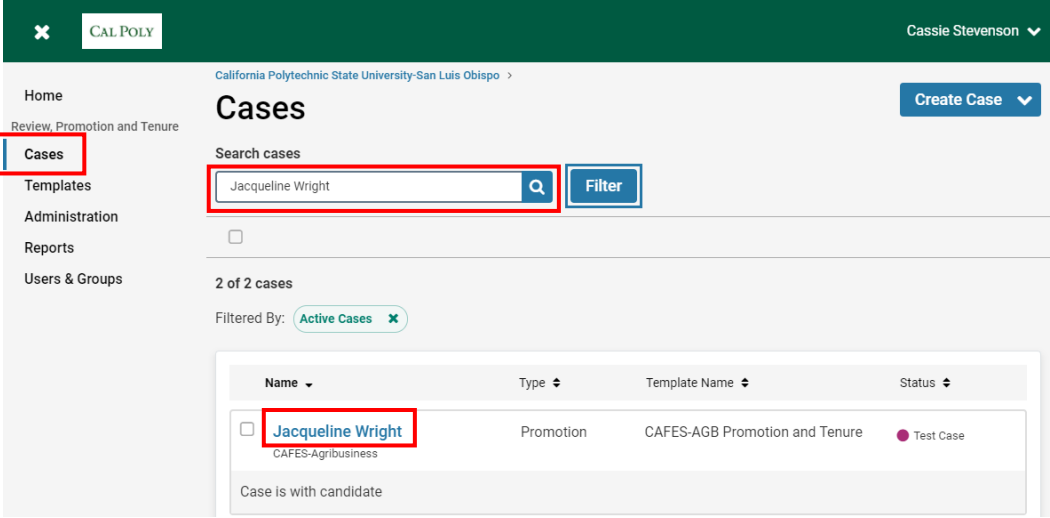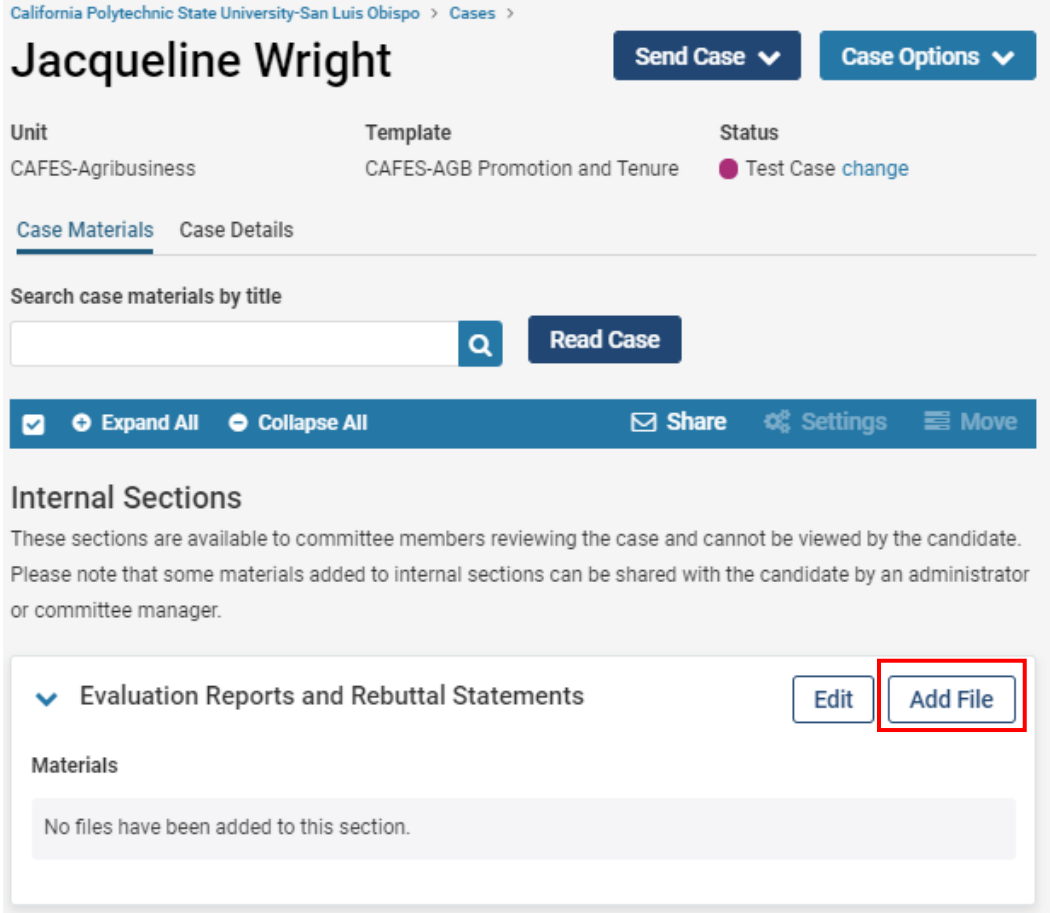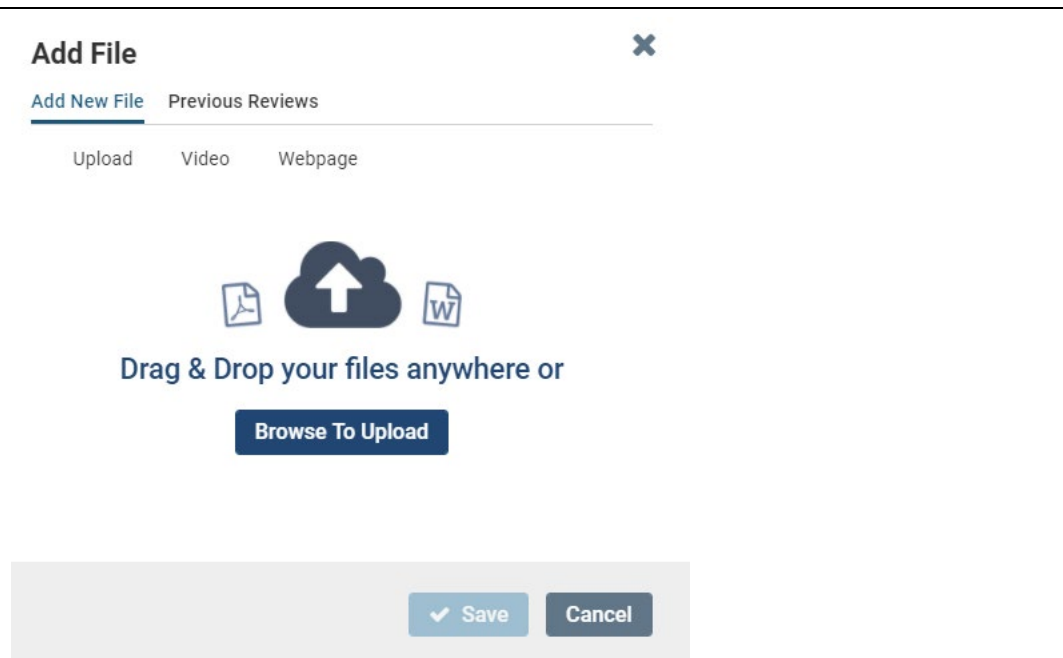
7) The print window will appear, select "Save as PDF" as the "Destination". Then click "Save."	**Print** 11 pages Destination Save as PDF Pages All Pages per sheet 1 **Save** Cancel

8) Next choose the location where you wish the "unsecured" PDF to be saved, name the document appropriately and select "Save."	Save As
	This PC > Desktop
	Organize ▾ New folder
	Quick access
	   Desktop
	   Downloads
	   Documents
	   Pictures
	   2020-21
	Name
	   AdobeSign Documents to Print for PAFs
	   CSM Document Revision
	   Dean's Evaluations
	   Excel Training Information
	   Lecturer Contracts Documentation Information
	   Organization Chart (Update)
	File name: DPRC Evaluation- Testy McTesterson (11-2-20)
	Save as type: Adobe Acrobat Document
	Hide Folders Save Cancel

9) Now when you open this document, there is no longer a lock symbol and it doesn't have "(SECURED)" as part of the PDF name.	**Before** DPRC Evaluation- Sample.pdf (SECURED) - Adobe Acrobat Pro DC File Edit View Sign Window Help Home Tools DPRC Evaluation- S... ✕ 1 / 11 87% Certified by Adobe Sign, a Document Cloud solution <adobe-sign-certified@adobe.com>, prod-hsm, certificate issued by Adobe CDS CA. Signature Pane **CAL POLY** SAN LUIS OBISPO **AP 109 - DPRC** Faculty Evaluation Form Department Peer Review Committees https://academic-personnel.calpoly.edu/content/policies/rpt **After** DPRC Evaluation- Testy McTesterson (11-2-20).pdf - Adobe Acrobat Pro DC File Edit View Sign Window Help Home Tools DPRC Evaluation- T... ✕ 1 / 11 87% **CAL POLY** SAN LUIS OBISPO **AP 109 - DPRC** Faculty Evaluation Form Department Peer Review Committees https://academic-personnel.calpoly.edu/content/policies/rpt

Uploading Evaluation Reports (AP 109 Form) and Setting the Rebuttal Period	
Instruction	**Screenshot/Details**
When the reviewing body (e.g., DPRC, Chair, CPRC, Dean) has reviewed the case and prepared their evaluation, they should notify you, and provide you with a copy of their evaluation (AP 109 form). You should review the AP 109 form to ensure that it is filled out correctly (e.g., evaluation type checkbox is accurate, vote is recorded, correct committee members are listed on the signature page). You will route the evaluation for signature using Adobe Sign (for DPRC and CPRC signatures use this guide). Then once all of the signatures are gathered, you will unsecure the PDF by using this guide.	
1) Sign in to your My Cal Poly Portal > My Apps > "Interfolio" and be sure to select "CAL POLY." 2) From the Interfolio home page, select "Cases" from the left-hand menu. 3) Find the candidate's case by looking through the list of cases on this page, or by typing their name into the "Search cases" box. 4) Open the candidate's case by selecting their name (blue link).	
5) Under the internal section called "Evaluation Reports and Rebuttal Statements," select "Add File."	

6) A window will pop-up, be sure "Add New File" is selected at the top, then either "Drag & Drop" the evaluation or "Browse to Upload" it from your computer.	**Add File** ✖ Add New File Previous Reviews Upload Video Webpage 📄 ☁️⬆️ 📄 **Drag & Drop your files anywhere or** **Browse To Upload** ✔ Save Cancel
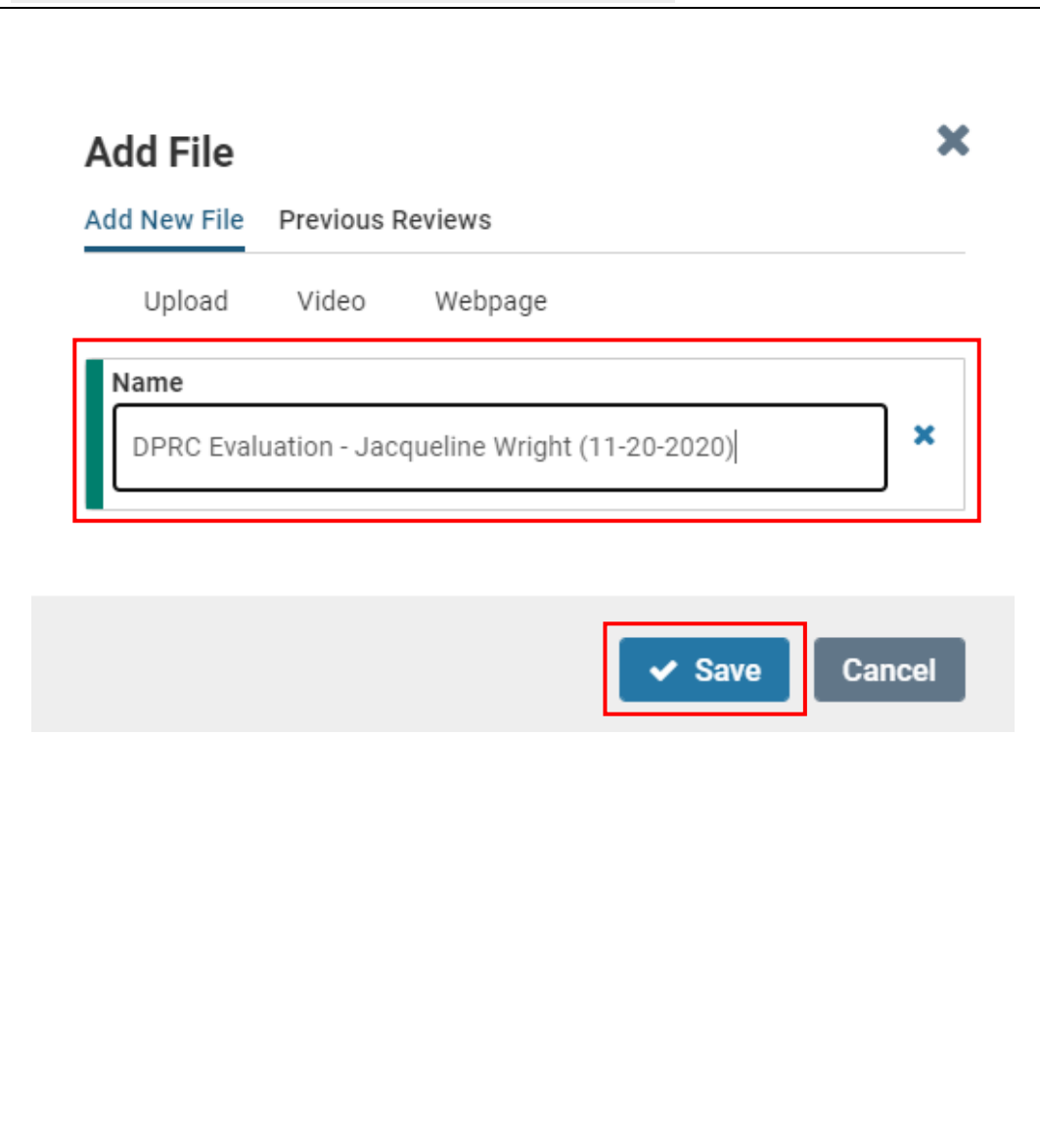
7) The name field will populate with the same name the file had on your computer. However, you will have the opportunity to change the name. It is helpful to use a consistent naming convention that includes the review level descriptor, the candidate name, and the date the file was uploaded and shared in Interfolio. See examples below.
 	
  a) DPRC Evaluation - Firstname Lastname (MM-DD-YYYY)
 	
  b) DC Evaluation - Firstname Lastname (MM-DD-YYYY)
 	
  c) DH Evaluation - Firstname Lastname (MM-DD-YYYY)
 	
  d) CPRC Evaluation - Firstname Lastname (MM-DD-YYYY)
 	
  e) Dean Evaluation - Firstname Lastname (MM-DD-YYYY)
 	
8) After you change the name of your file, then select "✓Save."
	Add File ✖
	
	Add New File Previous Reviews
	
	Upload Video Webpage
	
	Name
	
	DPRC Evaluation - Jacqueline Wright (11-20-2020) ✖
	
	✔ Save Cancel

9) Once the file has uploaded and appears as a blue link within the "Evaluation Reports and Rebuttal Statements" section, select the check box to the left of the evaluation. **10)** Then a menu bar will appear, select "☒ Share" > "With Candidate."	
11) Another window will open called "Message to Candidate". **12)** To enable the candidate to submit a rebuttal, select the check box next to "Enable" under "File Response." Once you select "Enable," more fields will appear.	

13) To the right you will find how you should complete all the fields on this page.

14) Select "Send" to share the evaluation with the candidate and open the rebuttal period.

Message to Candidate   ✕

To
Jacqueline Wright (jwrigh20@calpoly.edu)

Subject *

Evaluation from DPRC

Message *

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Please login to Interfolio, open your packet, and select "Shared Committee Files" to find the evaluation from the DPRC.

You have the right to submit a rebuttal statement to this evaluation within 10 calendar days, which is November 30 by 9:00 pm PST. **If you do not wish to submit a rebuttal statement to this evaluation, you may waive the 10-day rebuttal period by replying to this email stating such.** If you upload a rebuttal via Interfolio, please notify me after you have done so by replying to this email.

If you need help finding the evaluation or uploading your rebuttal, please use this help document: https://content-calpoly-edu.s3.amazonaws.com/academic-personnel/1/PDF/SubmittingRebuttalUsingInterfolio.pdf

Thanks,

Cassie Stevenson

body p

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

| DPRC Evaluation - Jacqueline Wright (11-20-2020) | ✕ |

👁 Preview   **✉ Send**   **Cancel**

Details

Direct email reply:
csteve03@calpoly.edu

File Response:
☑ Enable
When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

Message Reason

Rebuttal to DPRC

Deadline ❔

Nov 30, 2020   📅   ❔

Section for Response *

Evaluation Reports and Rel   ⌄

- **To:** The candidate's name and email address will auto-populate.
- **Subject:** "Evaluation from (insert REVIEWING BODY descriptor)"
  Examples: Evaluation from DPRC, Evaluation from DH/DC, Evaluation from CPRC, Evaluation from Dean
- **Message:** Use Sample #2 from the "Email Template for Interfolio" guide that is available on [Academic Personnel's Interfolio page](). You will need to add the reviewing body descriptor to the end of the first sentence, and update the rebuttal deadline date in the second sentence.
  Note: When counting ten calendar days, start counting the day after the date the evaluation is provided to the candidate, and if the tenth calendar day lands on a weekend or holiday, then the rebuttal deadline is moved to the next business day.
- **Shared Files:** The evaluation document you selected to share will be listed under "Share Files."
- **Direct Email Reply:** Under "direct email reply," your email address will display.
- **Message Reason:** "Rebuttal to (insert REVIEWING BODY descriptor)"
  Examples: Rebuttal to DPRC, Rebuttal to DH/DC, Rebuttal to CPRC, Rebuttal to Dean
- **Deadline:** Select the rebuttal period deadline from the calendar. Please note this sets a hard deadline, and candidates will not be able to submit their rebuttals via Interfolio past 9:00 pm on the date you select. The date listed in your "Message" should match the date you select as the "Deadline."
- **Section for Response:** Use the drop-down menu to select "Evaluation Reports and Rebuttal Statements."

15) After you share the evaluation with the candidate. Select "Send Case" > "Forward to Rebuttal Period for _____."

California Polytechnic State University-San Luis Obispo > Cases >

Jacqueline Wright

Send Case ⌄   **Case Options** ⌄

Forward to
Rebuttal Period for Department PRC Evaluation

Backwards to
WPAF Collection Period

Unit
CAFES-Agribusiness

Te...
CA...
Te...

Case change

Case Materials   Case Details

Search case materials by title

🔍   **Read Case**

Examples:

- If you just shared the DPRC evaluation with the candidate, then you should be moving the case forward to "Rebuttal Period for Department PRC Evaluation."
- If you just shared the Department Head/Chair evaluation, then you should be moving the case forward to "Rebuttal Period for DH/DC Evaluation."

Monitoring the Rebuttal Period

Scenario	Details
When a candidate's case is in a step called "Rebuttal Period for _____" step, that case will appear under the Interfolio "Home" page for the appropriate department/college staff member. After you share an evaluation, you will be expected to monitor the rebuttal period for that case. The case will not move forward to the next level of review automatically, so you will need to monitor the rebuttal period. Below are possible scenarios.	
Scenario 1: Candidate doesn't notify you of that they waive, but they also do not upload a rebuttal by the tenth day.	If there is no response/rebuttal by the day after the deadline, click "Send Case">"Forward to _____" at the top of the page. Use automated email message, or use Sample #1 from the "Email Template for Interfolio" guide that is available on [Academic Personnel's Interfolio page](#).
Scenario 2: Candidate replies to your email where you shared the evaluation stating they wish to waive their 10-day rebuttal period.	If a candidate replies to your email notification stating that they have no response/rebuttal and would like to waive their 10-day rebuttal period, you may move the case forward to the next level of review early. You do not need to wait the entire ten days. Use automated email message, or use Sample #1 from the "Email Template for Interfolio" guide that is available on [Academic Personnel's Interfolio page](#).
Scenario 3: Candidate uploads a rebuttal into Interfolio.	If the candidate uploads a rebuttal into Interfolio, you will receive an email notification from "California Polytechnic State University-San Luis Obispo noreply@interfolio.com" and the subject of the email will be "Response to shared file." See below for example. When a candidate submits a rebuttal, follow the instructions provided in the "Handling Candidate Rebuttals" step to provide the appropriate reviewing body access to see the rebuttal within Interfolio and to notify the reviewing body that the candidate submitted a rebuttal.

| Add the Reviewing Body to the Rebuttal Period Workflow Step in Interfolio |

Instruction	Screenshot/Details
1) Login to Interfolio **2)** Select the case you need to modify and click the candidate's name to open it.	California Polytechnic State University-San Luis Obispo > **Case List** **Create Case** ⌄ 🔍 adam beaker **Filter** **Clear Filters** **Unit** **Type** **Active or Closed?** All Units ⌄ All Types ⌄ Active ⌄ ☑ Include Child Units **1 of 1 cases** ☐ **Name** ⌄ Type ⇕ Template Name ⇕ Status ⇕ ☐ **Adam Beaker** Other CAFES-EIM Periodic Evaluation of Full-Time Temporary Faculty (FWS) **Test Case** CAFES-Experience Industry Mgm **Step 1 of 8:** WPAF Collection Period

3) Select "Case Options" and "Edit Case" in the upper right-hand corner.	California Polytechnic State University-San Luis Obispo > Cases >
	Adam Beaker **Send Case** ⌄ **Case Options** ⌄
	   Edit Case
	Unit **Template** Email Candidate
	CAFES-Experience Industry Mgm CAFES-EIM Periodic Evaluation of Full- Add Internal Section
	   Time Temporary Faculty (FWS) View Activity Log
	
	Case Materials Case Details

4) Select "Case Review Steps".	California Polytechnic State University-San Luis Obispo > Cases > Adam Beaker > **Case Summary** **< Return to Case** **Case Information** Edit **Type** **Name** Other Adam Beaker **Unit** **Email** CAFES-Experience Industry Mgm calpolytest+beaker@gmail.com **Candidate Requirements** Edit **Packet Due** Jan 14, 2020 **Creating a Case** ① Case Information ② Candidate Requirements ③ Internal Case Sections ④ Case Review Steps ⑤ Case Summary

5) On the next page, select the "Edit" link next to the "Rebuttal Period for _____" workflow step. It should be the step labeled "Current Step" and shaded green. **Examples:** - For the Department Peer Review Committee this step is called <mark>"Rebuttal Period for Department PRC Evaluation"</mark>. - For the Department Chair this step is called <mark>"Rebuttal Period for DC Evaluation"</mark>. - For the College Peer Review Committee this step is called <mark>"Rebuttal Period for College PRC Evaluation"</mark>.	**2** Department Peer Review Committee Due Date: Feb 7, 2020 Edit | Delete 👥 CAFES-EIM Department PRC (4) ⊖ No Instructions ⊖ No Required Documents **3** Rebuttal Period for Department PRC Evaluation (Current Step) Due Date: Feb 18, 2020 Edit | Delete 👥 CAFES-EIM Coordinator (1) ⊖ No Instructions ⊖ No Required Documents
6) Select "+ Add Committee". **Note:** You will notice that your "COLLEGE-DEPT Coordinator" committee is already assigned to the "Rebuttal Period for _____" step. In order for the reviewing body to be able to the rebuttal that was submitted, you need to add the respective committee to the "Rebuttal Period for _____" step.	California Polytechnic State University-San Luis Obispo > Cases > Adam Beaker > Case Review Steps > **Edit Details** **Step Details** (Step 3 of 8) **Step Name** Rebuttal Period for Department PRC Evaluation **Due Date** Feb 18, 2020 **Edit Step Details** **10** people can administer the case at this step. **0** administrators are recused at this step. Manage **Reviewers** ➕ Add Committee ⌄ **CAFES-EIM Coordinator** Options ⌄ Standing Committee (1)

7) Add the committee (e.g., DPRC or Department Head/Chair) for the level of review the rebuttal was submitted in response to, by selecting "Standing Committee". From the drop-down menu select the committee that the rebuttal was submitted in response to:

- COLLEGE-DEPT Department PRC (e.g., CAFES-EIM Department PRC or CSM-MATH Department PRC)
- COLLEGE-DEPT Department Chair (e.g., CLA-ART Department Chair or CSM-MATH Department Chair)

Note: Be sure to not select the standing committees that have "DEPT" in the name, these are college level committees used for testing purposes only.

8) Then select "+ Add".

Add Committee ✖

Who is reviewing the case at this step?

🔘 Standing Committee   ⚪ Ad Hoc Committee   ⚪ Individual User

Standing committees are created at the unit level (i.e. university, school, college etc.) and can be reused for cases in that unit.

Standing committee name
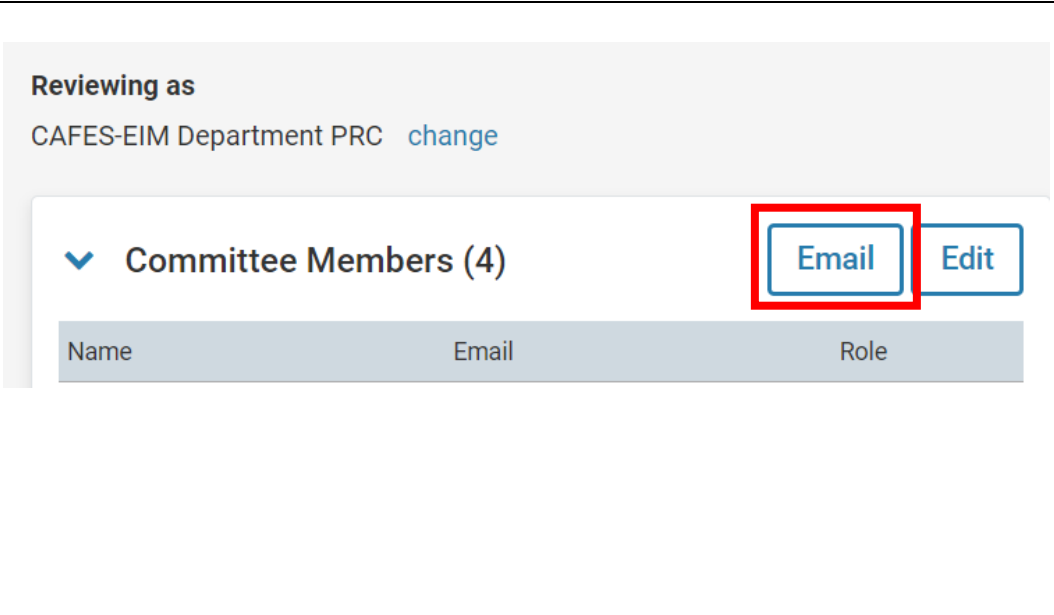
👥 | CAFES-EIM Department PRC in CAFES-Experience Industry Mgm ⌄ |
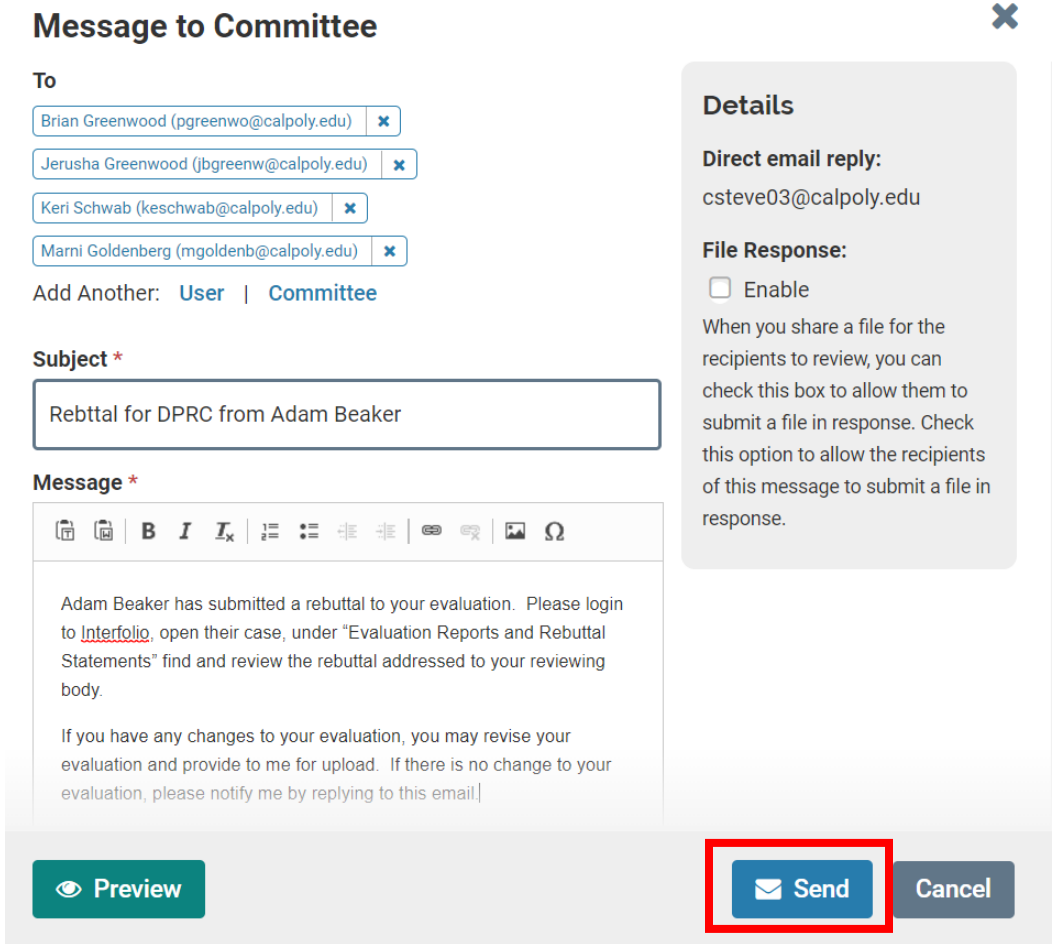
➕ **Add**   **Cancel**

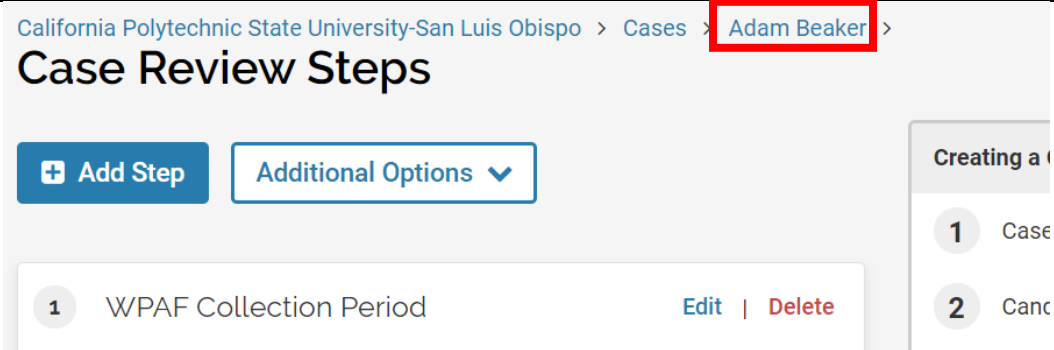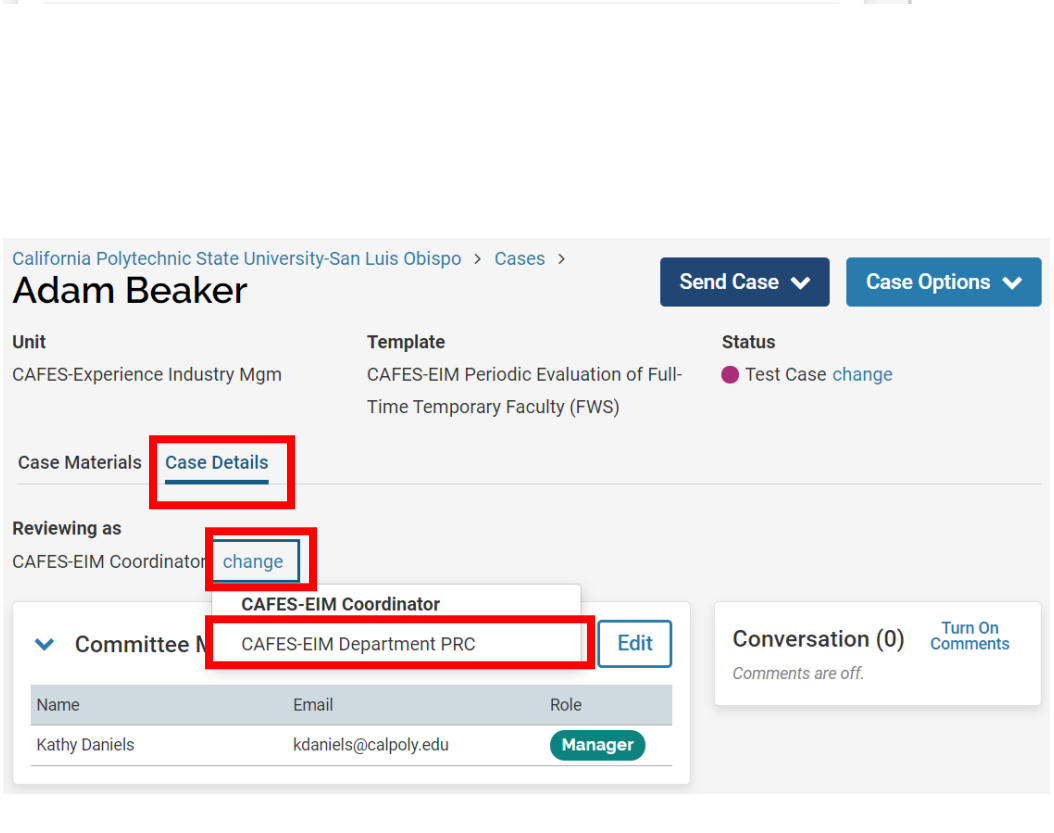| How to Email Reviewing Body about the Rebuttal within Interfolio	
Instruction	**Screenshot/Details**

1) After you add the correct reviewing body committee to the "Rebuttal Period for _____ (Current Step)", you should email the committee and let them know that a rebuttal has been submitted.
 	
2) Return to the candidates main page by selecting their name at the top.
 	
3) Then select "Case Details".
 	
4) You will then need to select "change" and from the drop-down menu select the committee you added to the rebuttal period step.
 	
Now the appropriate committee members should populate on this page.
	California Polytechnic State University-San Luis Obispo > Cases > Adam Beaker >
	Case Review Steps
	
	🞢 Add Step Additional Options ⌄
	
	Creating a (
	1 Case
	2 Canc
	
	1 WPAF Collection Period Edit | Delete
	
	California Polytechnic State University-San Luis Obispo > Cases >
	Adam Beaker Send Case ⌄ Case Options ⌄
	Unit Template Status
	CAFES-Experience Industry Mgm CAFES-EIM Periodic Evaluation of Full- ● Test Case change
	                          Time Temporary Faculty (FWS)
	
	Case Materials Case Details
	
	Reviewing as
	CAFES-EIM Coordinator change
	                CAFES-EIM Coordinator
	⌄ Committee M CAFES-EIM Department PRC Edit Conversation (0) Turn On Comments
	                                                       Comments are off.
	Name Email Role
	Kathy Daniels kdaniels@calpoly.edu Manager

5) Select the "Email".	**Reviewing as** CAFES-EIM Department PRC change ⌄ Committee Members (4) Email Edit Name Email Role

6)	Use the "Sample #3: Response/Rebuttal Notification to Reviewing Body" email template that can be found on the Academic Personnel website: https://academic-personnel.calpoly.edu/interfolio	**Sample #3: Response/Rebuttal Notification to Reviewing Body** TO: Reviewing Body (this will auto-populate) FROM: Department Coordinator (this will auto-populate) SUBJECT: Response/Rebuttal for (REVIEWING BODY) from (CANDIDATE NAME) <u>(CANDIDATE NAME)</u> has submitted a rebuttal to your evaluation. Please login to Interfolio, open their case, under "Evaluation Reports and Rebuttal Statements" find and review the rebuttal addressed to your reviewing body. If you have any changes to your evaluation, you may revise your evaluation and provide to me for upload. If there is no change to your evaluation, please notify me by replying to this email.
7)	Copy and paste the subject and message fields, then select "Send".	**Message to Committee** ✖ **To** Brian Greenwood (pgreenwo@calpoly.edu) ✖ Jerusha Greenwood (jbgreenw@calpoly.edu) ✖ Keri Schwab (keschwab@calpoly.edu) ✖ Marni Goldenberg (mgoldenb@calpoly.edu) ✖ Add Another: User | Committee **Subject** * Rebttal for DPRC from Adam Beaker **Message** * Adam Beaker has submitted a rebuttal to your evaluation. Please login to Interfolio, open their case, under "Evaluation Reports and Rebuttal Statements" find and review the rebuttal addressed to your reviewing body. If you have any changes to your evaluation, you may revise your evaluation and provide to me for upload. If there is no change to your evaluation, please notify me by replying to this email. 👁 **Preview** ✉ **Send** Cancel **Details** **Direct email reply:** csteve03@calpoly.edu **File Response:** ☐ Enable When you share a file for the recipients to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipients of this message to submit a file in response.

After Reviewing Body Reviews the Rebuttal

Scenario	Details
After the reviewing body reviews the rebuttal from a candidate, they will need to decide whether their evaluation should be changed as a result of the rebuttal. Below are possible scenarios that can result after a rebuttal.	
Scenario 1: Reviewing body makes **minor** editorial change to their evaluation (AP 109).	1. Route the revised evaluation for signatures. 2. Delete the old evaluation and upload the new evaluation (AP 109). 3. Share new evaluation with candidate for another 10-day rebuttal period. 4. Use automated email message, or use Sample #5 from the "Email Template for Interfolio" guide that is available on [Academic Personnel's Interfolio page](#). 5. The candidate will have three options that are described in Sample #5.
Scenario 2: Reviewing body makes **major** changes to their evaluation (AP 109).	1. Route the revised evaluation for signatures. 2. Delete the old evaluation and upload the new evaluation (AP 109). 3. Share new evaluation with candidate for another 10-day rebuttal period. 4. Use automated email message, or use Sample #5 from the "Email Template for Interfolio" guide that is available on [Academic Personnel's Interfolio page](#). 5. The candidate will have three options that are described in Sample #5.
Scenario 3: Reviewing body makes no changes to their original evaluation (AP 109).	1. Notify the candidate that the reviewing body has reviewed their rebuttal but does not wish to make any changes to their original evaluation using Sample #4 from the "Email Template for Interfolio guide that is available on [Academic Personnel's Interfolio page](#). 2. Forward the case to the next reviewing body with a message similar to Sample #1 from the "Email Template for Interfolio guide that is available on [Academic Personnel's Interfolio page](#).

Email Templates for Interfolio

Sample #1: Case Ready for Review

To:	Reviewing Body (this will auto-populate)
From:	Department Coordinator (this will auto-populate)
Subject:	Case Ready for Review
Message:	Please login to Interfolio, to view the cases in your queue. Your evaluation report or AP 109 is due to the candidate by **DATE**. Please remember to use the latest version of the AP 109, which is available for download under on Academic Personnel's Forms webpage: https://academic-personnel.calpoly.edu/content/forms

Sample #2: Evaluation Notification to Candidate

To:	Candidate (this will auto-populate)
From:	Department Coordinator (this will auto-populate)
Subject:	Evaluation from **REVIEWING BODY**
Message:	Please login to Interfolio, open your packet, and select "Shared Committee Files" to find the evaluation from the **REVIEWING BODY**. You have the right to submit a rebuttal statement to this evaluation within 10 calendar days, which is **DATE** by 9:00 pm PST. **If you do not wish to submit a rebuttal statement to this evaluation, you may waive the 10-day rebuttal period by replying to this email stating such.** If you upload a rebuttal via Interfolio, please notify me after you have done so by replying to this email. If you need help finding the evaluation or uploading your rebuttal, please use this help document: https://product-help.interfolio.com/en_US/candidate/view-and-respond-to-files-shared-with-you-by-a-committee-rebuttal

Sample #3: Response/Rebuttal Notification to Reviewing Body

To:	Reviewing Body (this will auto-populate)
From:	Department Coordinator (this will auto-populate)
Subject:	Response/Rebuttal from **CANDIDATE NAME** to **REVIEWING BODY**
Message:	**CANDIDATE NAME** has submitted a rebuttal to your evaluation. Please login to Interfolio, open their case, then look under "Evaluation Reports and Rebuttal Statements" find and review the rebuttal addressed to your reviewing body. **If you have any changes to your evaluation, you may revise your evaluation and provide to me for upload. If there is no change to your evaluation, please notify me by replying to this email.**

Sample #4: No Changes to Original Evaluation

To:	Candidate (this will auto-populate)
From:	Department Coordinator (this will auto-populate)
Subject:	Notification from **REVIEWING BODY**
Message:	The **REVIEWING BODY** has received and reviewed your rebuttal and they will not be changing their evaluation. Therefore, your rebuttal will accompany the original evaluation to the next level of review.

Sample #5: Revised Evaluation Notification to Candidate	
To:	Candidate (this will auto-populate)
From:	Department Coordinator (this will auto-populate)
Subject:	Revised Evaluation from **REVIEWING BODY**
Message:	In response to your rebuttal, the **REVIEWING BODY** has revised their evaluation. Please login to Interfolio, open your packet, and select "Shared Committee Files" to find the revised **REVIEWING BODY** evaluation. The original evaluation will be removed. At each level of review only one evaluation and one rebuttal will move forward. **Below are your options and please confirm which option you are choosing by responding to this email:** 1. Keep your original rebuttal, thus waiving your new rebuttal period. If you do not wish to submit a revised rebuttal statement to this evaluation, you may waive the 10-day rebuttal period by replying to this email stating such. 2. Submit a new rebuttal to this revised evaluation within 10 calendar days, which is **DATE** by 9:00 pm PST. If you upload a new rebuttal via Interfolio, your original rebuttal statement will be removed. If you need help finding the evaluation or uploading your rebuttal, please use this help document: https://product-help.interfolio.com/en_US/candidate/view-and-respond-to-files-shared-with-you-by-a-committee-rebuttal 3. Remove your original rebuttal statement, thus no rebuttal would move forward with the revised evaluation.

Sample #6: Second Response/Rebuttal Notification to Reviewing Body	
To:	Reviewing Body (this will auto-populate)
From:	Department Coordinator (this will auto-populate)
Subject:	Response/Rebuttal from **CANDIDATE NAME** to **REVIEWING BODY**
Message:	**CANDIDATE NAME** has submitted a second rebuttal to your evaluation. Please login to Interfolio, open their case, then look under "Evaluation Reports and Rebuttal Statements" find and review the rebuttal addressed to your reviewing body. If you have any changes to your evaluation, you may revise your evaluation and provide to me for upload. If there is no change to your evaluation, please inform the candidate of your non-action, and then notify me by replying to this email.