

Winthrop University

Interfolio Review, Promotion and Tenure Committee User Guide

Winthrop University utilizes the Interfolio Review, Promotion and Tenure module for submission and review of dossiers for faculty evaluation. The system is designed to move dossiers through a workflow that aligns with Winthrop’s institutional tenure and promotion policies. This document assists committees in accessing and evaluating portfolios.

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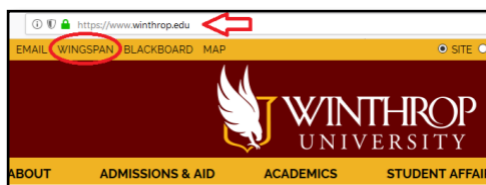
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The Dean’s offices within each College has at least one designee, the Interfolio P&T administrator, who will be responsible for creating cases for P&T candidates, adding faculty reviewers, and managing committee assignments. The following guide assumes that access to the user has been granted. Please consult the Interfolio P&T administrator if access issues occur.	3
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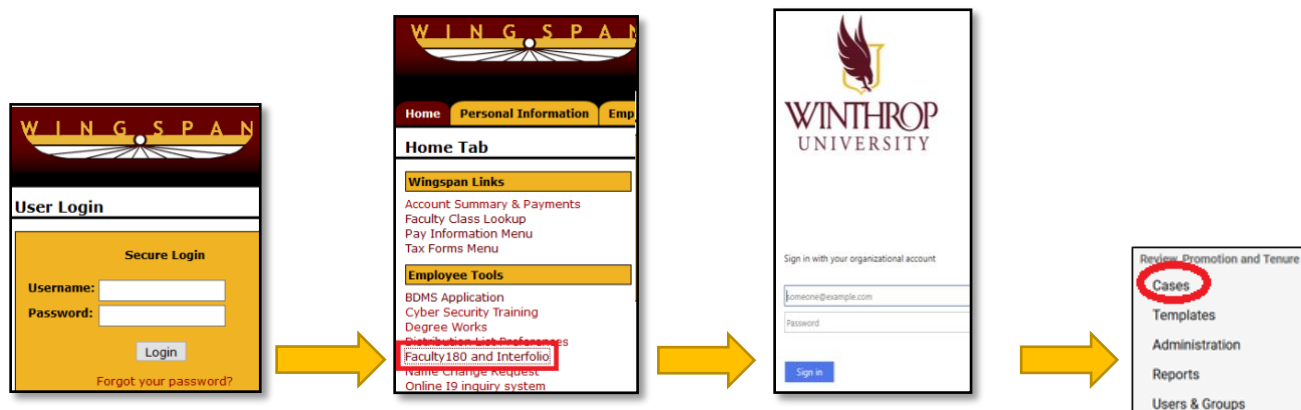
User Access

Logging in to Interfolio Review, Promotion and Tenure

1. Users first login to Wingspan with their University log-in information.



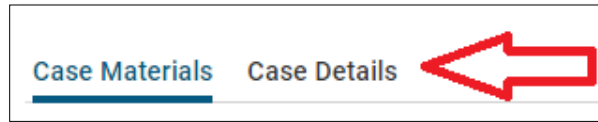
2. Select the **Faculty 180 and Interfolio** link from the **Employee Tools** menu. This will take you to the Winthrop portal, where you will provide your University sign-in information.
3. Once logged in all users should see the Review, Promotion and Tenure menu on the left. Click **Cases** to access the system



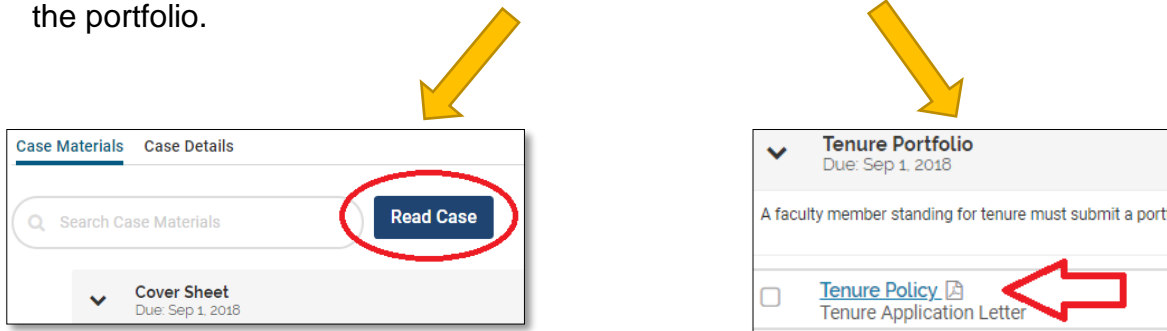
Reviewing the Case

Candidate's Case Page

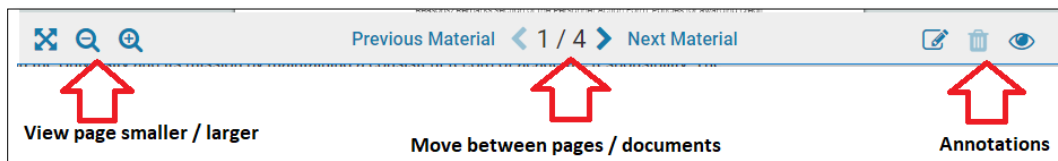
1. Within the case, view candidate materials by selecting the candidate's name.
2. The **Case Materials** tab includes the portfolio, external evaluation, and committee review documents.



3. Reviewing committees can either read the entire case or click on individual files within the portfolio.



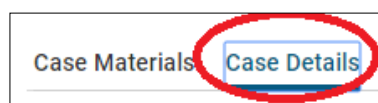
Clicking the various hyperlinks will open the documents in the document viewer. At the bottom of the screen, options exist to assist in reading the materials.



Uploading committee report(s)

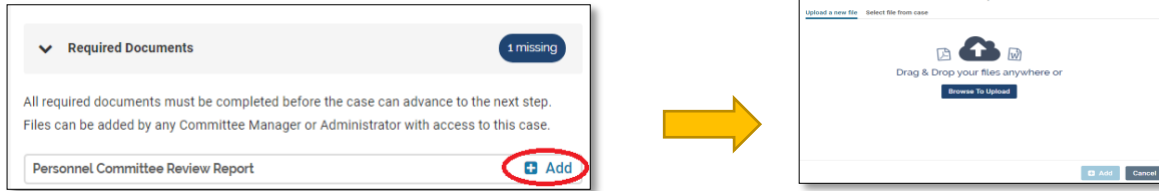
Note: Committee Chairpersons are responsible for uploading the committee's report(s) including a recommendation and a tally of the committee's vote. When applicable, the chair should upload a letter of dissent. To upload the report:

1. Click on the **Case Details** tab.

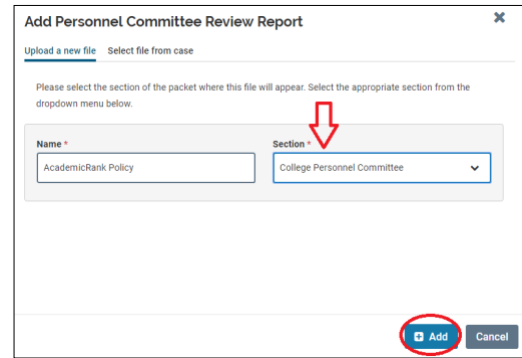


2. Scroll down to the **Required Documents** section and Click **Add**.

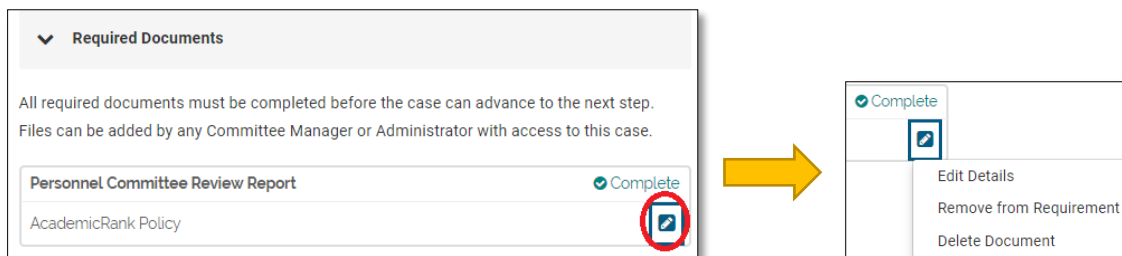
3. Click **Browse to Upload** and select the report (containing signatures of committee members) to upload.



4. Select the section in the case to place the file. The file should be uploaded in the section corresponding with the current workflow step. The file name can also be updated if necessary. Then click **“Add”**.



5. Once the file is upload, if it needs to be deleted click on the pencil beside the document name and select **“Delete Document”** from the list of options.



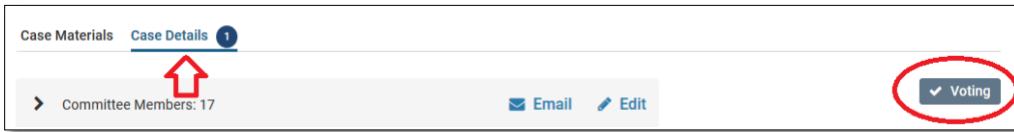
6. If a candidate is applying for tenure and promotion concurrently, two committee reports must be uploaded. Thus, the system will require **2** documents in order to move the case forward.

Reminder: When the decision of the committee is not unanimous, the report should indicate the areas of disagreement. If a single report cannot adequately represent the evaluation of committee members, a minority report must be submitted along with the primary report. All committee members must sign either the primary report or minority report.

Tallying Committee Votes

Note: Voting takes place as part of the review committee meeting and is tallied by the committee chairperson who enters the result in Interfolio.

1. To add votes , click the **Voting** button at the top of the select the **Case Details** page



- Record the tally of votes for all appropriate actions.
- Click **Save**.

Committee Votes For Test - RPT Review Committee3

Date: Sep 11, 2018

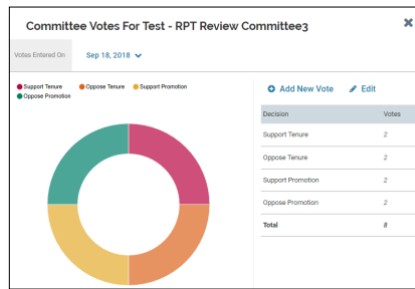
Capitalized letter month numeric day, four letter year (i.e. Dec 17, 1903)

Decision	Votes
Support Tenure	2
Oppose Tenure	2
Support Promotion	2
Oppose Promotion	2

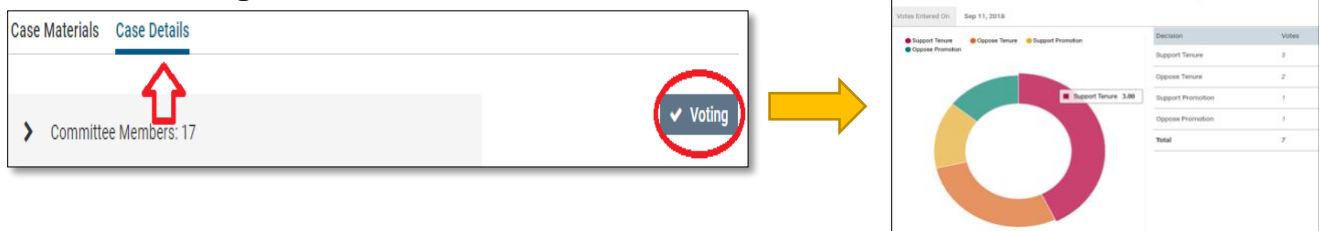
Notes

Buttons: Delete, Save, Cancel

- Review the votes to confirm they were entered correctly and click the X to close the window.

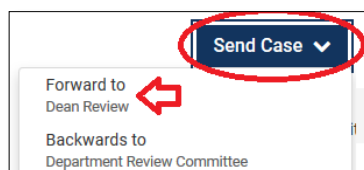


Committee members can view vote tallies for their committee. To do so, click the **Case Details** and select **Voting**.



Sending the Case to the Next Reviewing Body

- Click **Send Case** from the top of the page near the reviewer's profile. Then chose **Forward to**



2. Uncheck the box **Send a message to the reviewers gaining access**. Click **Continue** to send the case to the next review step.

Send Case Forward

Great job! You're sending the case forward to the next step, Dean Review. The following reviewers will lose access to the case:

Test - RPT Review Committee | 17 members

The following reviewers will gain access to the case:

Dean Review | 0 members

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 for Big Stuff

Message *

Dear committee members,
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.

body p

[Preview](#) [Continue](#) [Cancel](#)

3. The required documents must be added before the case can be moved to the next step in the workflow. If the required document(s) have not been uploaded the following message will appear.

Send Case Forward

There are unsatisfied document requirements for this case that must be uploaded by an administrator or committee manager before the case can be sent forward.

[View Requirements](#) [Close](#)

Candidate Portfolio Protections

Once a faculty member submits their case, the sections in the case become locked so that no material may be deleted from the portfolio. At any stage of the review process, no material may be added to the portfolio by the candidate without prior approval of all prior review bodies.

To have the candidate's case unlocked for such additions, the Department or unit committee must notify the respective Department Chair (for the Departmental Committee) or Dean (for the unit committee). The Department Chair will then email the candidate, copying the Vice Provost for Faculty Affairs (sumtert@winthrop.edu) and Business Applications Analyst (millerjh@winthrop.edu) specifying the materials to be added, the specific sections of the portfolio requiring updates, and the due date for those changes. Upon receiving the email, Jessica Miller will unlock the specified sections. Once the candidate has completed updating the documents they will need to submit their case. The new and/or revised documents may only be added to the portfolio with the approval of all prior review bodies.

Interfolio Training Materials and Assistance

Winthrop Support:

For all inquiries at the Institutional level, contact:

Takita Sumter, sumtert@winthrop.edu ; x3063	University procedures and requirements, templates and best practices within Interfolio
Jessica Miller, millerjh@winthrop.edu ; x3104	Case/search start-up, technical support of the Interfolio tools,

Interfolio Product Support:

Monday – Friday, 8 a.m. – 5 p.m. Central time

Website: <http://product-help.interfolio.com/>

Email: help@interfolio.com; (877) 997-8807

Interfolio T&P Aids

Training Resources are below for quick reference. These will assist the campus community with submitting and reviewing cases via Interfolio.

For Candidates

[Best Practices and Resources for Candidates \(Videos\)](#)

[Candidate's Guide to Interfolio: Review, Promotion, and Tenure \("RPT"\)](#)

[The Candidate Experience of an Interfolio: Review, Promotion, and Tenure Review](#)

[Best Practices for Naming Packet Materials and Using Bookmarks to Organize Your Packet](#)

[Add Links to Webpages and YouTube and Vimeo Videos to your Packet](#)

[Using Collections from your Dossier to Satisfy Packet Requirements](#)

[Re-using Materials from Previous Packets in Current or Upcoming Reviews](#)

[Deleting Materials from Your Candidate Packet](#)

For Reviewers

[View and Manage Your Case List](#)

[View Case Materials and Information About Your Committee](#)

[Read and Evaluate Case Packet Materials Using the Materials Viewer](#)

[Make Notes on Case Packet Materials and Export Your Annotations](#)

For Admins

[Create a Case](#)

[Create Multiple Cases](#)

[Move a Case Forward or Backward](#)

[Apply a Status to a Case](#)

[Close, Reopen, or Delete a Case](#)

[Add Committees or Individuals to a Case Review Step](#)

[Internal Case Sections: Add Case Sections that Only Committee Members and Other Reviewers Can See](#)

[For External Evaluators: A Guide to Providing Requested Evaluations in Interfolio: Review Promotion, and Tenure](#)