Interfolio PTR
User Guide

For Faculty
(Interfolio Role: Users)
Accessing Interfolio

Interfolio Job Aid: Sign in to Interfolio with SSO or a Partner Institution
1. Navigate to https://account.interfolio.com/login
2. Select “Sign in with Partner Institution”
3. Search for **University of Connecticut**. Select Sign In.
4. Login with your UConn NetID and password.
5. Select the **UConn** icon to navigate to the Promotion, Tenure, and Reappointment module. Select **Dossier** to navigate to the Dossier module.

You will be able to access either module from your profile in the upper right-hand corner of the homepage.
Manage Materials in Dossier

Interfolio Job Aid: Dossier Quick Start Guide

All users have access to the Dossier module to organize case materials. Faculty can upload materials and organize materials into collections for future reviews. Faculty Dossier accounts never expire, and your uploaded materials will always be available to you at any time, even if you are no longer with UConn.
Upload materials to Dossier

1. From the Dossier module, click **Materials** in the left-hand navigation bar.

2. Click **Add Files** on the My Materials page.
3. Drag and drop or browse to upload materials. Materials can be uploaded, or linked to video or webpages.
4. If desired, select the type of material for each file you are uploading. This will help you categorize documents.

5. Give your files names that will make them easy to find in your Dossier.

6. Click **Add**.

7. The uploaded material will appear in your Dossier.

**Rename file**

**Categorize files by type (i.e. CV, Presentation, Website, Teaching Portfolio, etc.)**
Create Collections of your Materials in Dossier

1. From the Dossier module, click **Collections** in the left-hand navigation bar.

2. Click **Add Collection** on the My Materials page.
3. Name your collection. For example, to compile materials for an upcoming review, you could name your collection “AY22-23 P&T Review”. Click Add.
4. Click the name of your collection to begin adding materials.

5. Click **Add Materials** from the collection summary page.

6. **Choose Existing** to add materials from your Dossier, or **Add New File** from your computer. Newly-added materials to a Collection will automatically be added to your Materials.

7. Click **Add**.
Populate your Case

Interfolio Job Aid: Candidate’s Guide to Interfolio Review, Promotion, and Tenure

Interfolio Webinar: Preparing Your Candidate Packet
Notification your Case has been Created

1. Follow departmental procedures to notify the department head of your intent to be reviewed for a PTR action in the forthcoming cycle.

2. Your department will create a case in Interfolio. You will be notified that your case is ready via email by noreply@interfolio.com.

3. Select View Case in the notification email.

Navigate to Interfolio to view case requirements
4. Log into the Interfolio PTR module (See Accessing Interfolio job aid).

5. From the case notification email, you will be routed directly to your packet.

From the PTR module homepage, you can click the link to **Your Packets** from the left-hand navigation bar, or use the link in **My Tasks** and select the packet you want to work on.
View Packet Requirements

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

9. Click **View Instructions** in the upper right-hand corner to read instructions for assembling and submitting your packet.

Scroll through the Overview tab to view all required submissions

Review instructions for completing each section of the dossier
10. Your packet is divided into 2 sections: **External Letters of Recommendation** and **Candidate Dossier**.

The *External Letters of Recommendation* section contains a list of materials you will need to upload to support the solicitation of external evaluations on your behalf. Please note that this section of the packet has a different deadline from the final submission of materials.

The *Candidate Dossier* section contains a list of materials you will need to upload by the submission deadline of August 23, including the PTR form and supporting materials.
11. Navigate to the **Packet** tab to begin uploading and completing requirements.

12. Upload a CV, Major Publications or Creative Work, and a list of faculty-recommended external reviewers and contact information in the External Letters of Recommendation section by the due date.

   a. Next to each requirement, click **Add**.
b. **Choose Existing** materials from your Dossier, or **Add New File** from your computer. 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 when reviewing your documents.

c. Click **Add**.

d. If you need to edit or replace a document, click **Edit** next to the title of the document in the Packet tab.

You can edit the title of the file or click **Replace** to choose a new file to replace it.
13. When all requirements in the *External Letters of Recommendation* section are complete, submit the section by clicking **Submit** next to the section title.

Select **Preview** to preview the file as reviewers will see it. This section of your packet will be routed to the Department Head, who will utilize materials to solicit external evaluations.

Once a section is submitted, it is locked for future edits, so ensure that you are satisfied with the submission. Click **Yes** on the popup to proceed or **No** to make further edits.

14. After you have successfully submitted your packet, you will see a green confirmation notice appear in the lower left corner of the browser indicating that the section was successfully submitted. This message disappears after a few seconds.

If you would like to see if a section has been submitted in the future, click on **Packet** and notice that under the section name, “Submitted” appears. It will also appear on the **Overview** tab under Candidate Materials.
14. Prior to the August 23 deadline, navigate to the **Packet** tab to complete the Candidate Dossier section.

15. Upload the PTR Form, summary of courses taught and Student Evaluation of Teaching, Other Teaching Evidence, COVID-19 Impact Statement, Supporting Materials, Appointment Letter and Previous Correspondence in the Candidate Dossier section by the due date.

a. Next to each requirement, click **Add**.
b. Choose Existing materials from your Dossier, or Add New File from your computer. 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 when reviewing your documents.

c. Click Add.

d. If you need to edit or replace a document, click Edit next to the title of the document. You can edit the title of the file or click Replace to choose a new file to replace it.
14. Complete the **Statement By the Candidate form** to certify the validity of materials by the due date.
   a. Select **Fill Out Form** next to the Section Six: Statement by the Candidate form.
   b. Complete required form fields.
   c. Click **Save Responses**.
   d. Click **Return to Packet**.

15. Complete the **Cover Page form** to summarize the nature of your case by the due date. Consult your department head to confirm information before submitting.
   a. Select **Fill out Form** next to the Cover Page form.
   b. Complete required form fields.
   c. Click **Save Responses**.
   d. Click **Return to Packet**.
16. When all requirements in the Candidate Dossier section are complete, submit the section by clicking **Submit** next to the section title.

Select **Preview** to preview the file as reviewers will see it. This section of your packet will be routed to the departmental review stage.

Once a section is submitted, it is locked for future edits, so ensure that you are satisfied with the submission. Click **Yes** on the popup to proceed or **No** to make further edits.

17. After you have successfully submitted your packet, you will see a green confirmation notice appear in the lower left corner of the browser indicating that the section was successfully submitted. This message disappears after a few seconds.

If you would like to see if a section has been submitted in the future, click on **Packet** and notice that under the section name, “Submitted” appears. It will also appear on the **Overview** tab under Candidate Materials.
Adding Additional Evidence to your Case after Submission

Should you acquire additional substantial evidence to be added to your active case after you have submitted for review and your case is locked to you, please contact your departmental Interfolio administrator, who can appropriately route and upload revisions to your case in line with the current and previous stages of review.