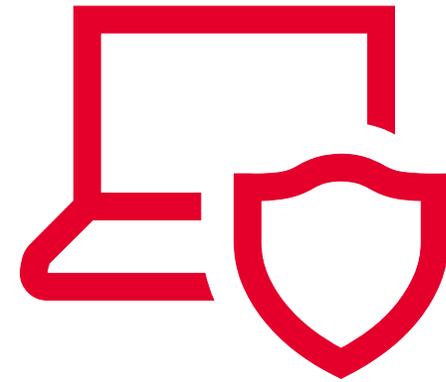


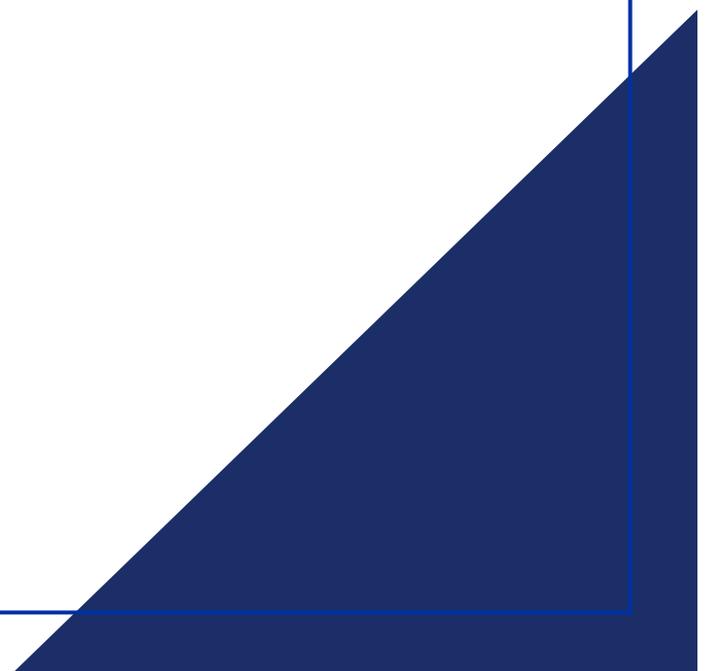
Interfolio PTR User Guide

For Reviewers (Deans, Department Heads, Review Committees)
(Interfolio Role: Users, Committee Managers, Committee Members)



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”

interfolio

Sign In

Sign in with email

Email *

Password *

Sign In

[Forgot your password?](#)

Other Sign In Options

[Sign in with Partner Institution](#)

[Sign in with Google](#)

Don't have an account?
Use Interfolio's suites of services to simplify your academic life.
[Create an account](#)

3. Search for **University of Connecticut**. Select Sign In.



Sign in through your institution

If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.



Sign In

[Sign in with an Interfolio account >](#)

4. Login with your UConn NetID and password.

NetID Single Sign On

On your way to...
shibboleth.uconn.edu

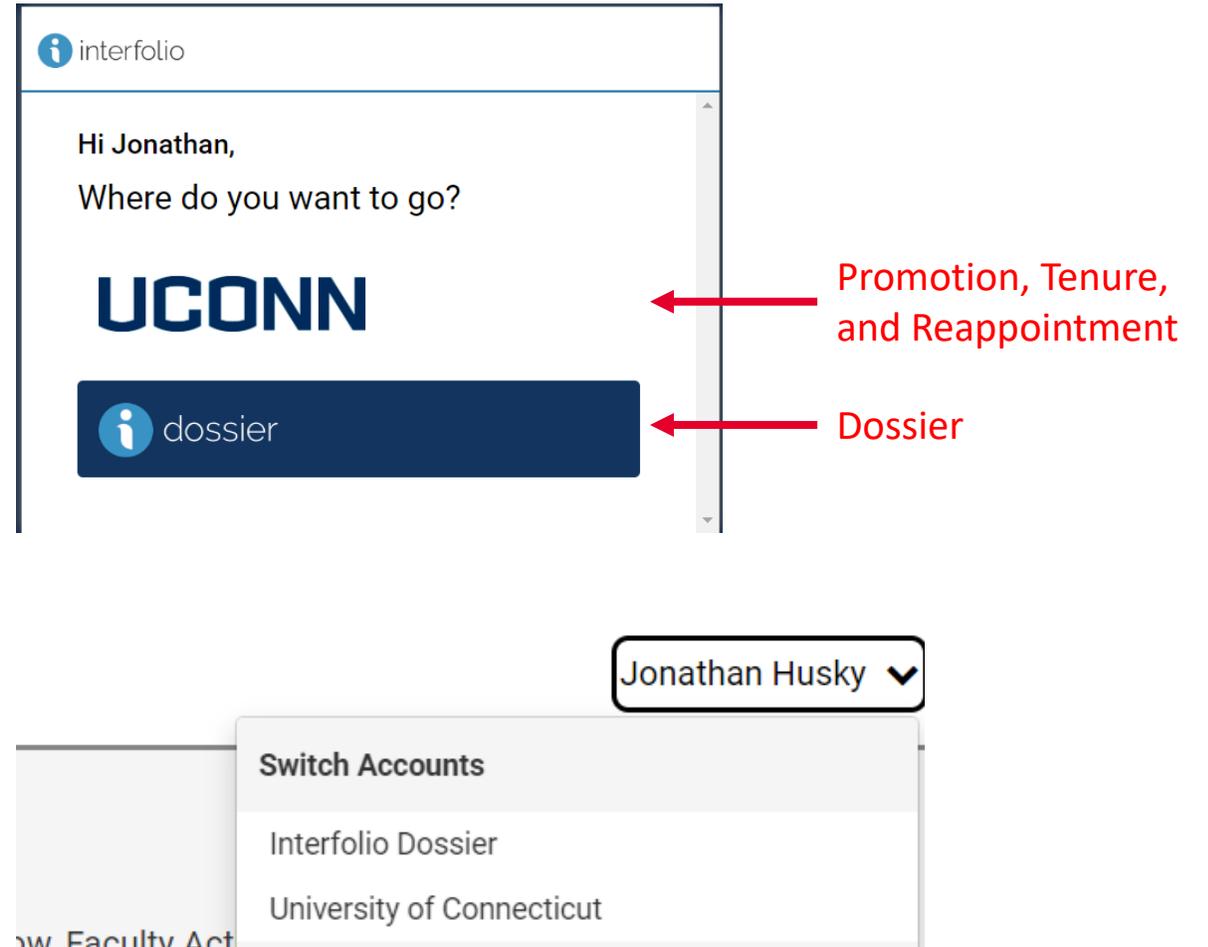
Login

UConn Single Sign On serves as your login to many University computing and networking services.

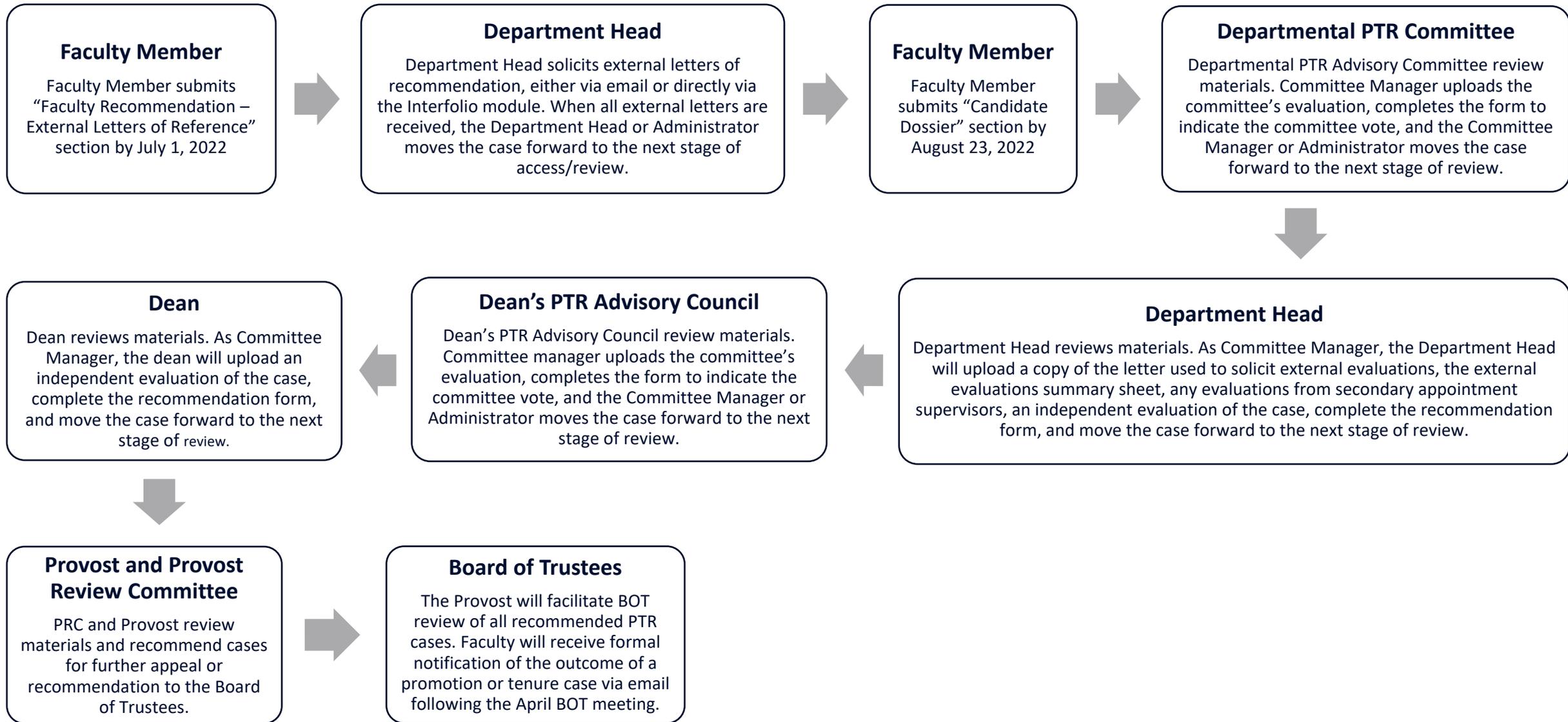
[Forgot password?](#)

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.



Example Review Workflow for Promotion and Tenure Case



Interfolio Job Aid: User Roles in Interfolio Review, Promotion, & Tenure

Committee Members -- A user must be added to a committee by an Administrator in order to view a candidate's packet on the particular cases they have access to. Committee Members will lose access when "recused" from a case at a particular workflow step by the Committee Manager or Administrator. Committee Members will lose access to a case when it has been moved forward to the next stage of review.

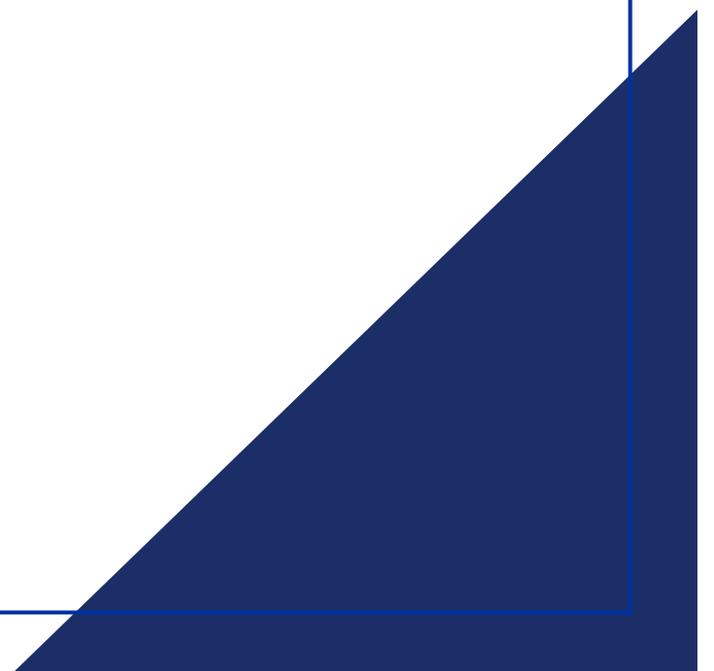
Committee Managers -- Possess all of the capabilities of Committee Members, plus a few more. Most noticeably, Committee Managers have the power to move a case either backward or forward after a committee has finished reviewing. In addition, Committee Managers have communication powers within the system; they can e-mail both the candidate and committee members from within the product and can complete committee submission requirements. An Administrator must designate a user as a Committee Manager in order for them to serve in this role. Committee managers will lose access to a case when it has been moved forward to the next stage of review.

Administrators -- In addition to being able to access documents, e-mail candidates, and committees, and move a case forward or backward, Administrators are the only users who can create cases for the units to which they have access. Administrators can also create standing committees. Administrators can exist at any organizational level in RPT and have the ability to perform administrative functions for all units within their administrative hierarchy. For example, an Administrator at a school/college level will have access to settings, cases, and committees only at or beneath the school/college level, such as departments. Administrators will lose such access only when "recused" from a case at a particular workflow step. Administrators at the departmental and school/college level will lose access to a case when it moves beyond a level they have access to administer.

Accessing and Reviewing Assigned Cases

Interfolio Job Aid: Committee Member's Guide to
Interfolio Review, Promotion, and Tenure

Interfolio Job Aid: Reviewing Cases



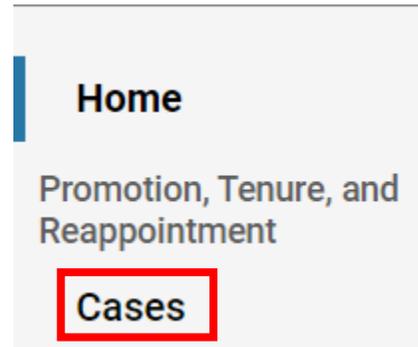
View Your Case List

All cases assigned to a level of the workflow that you have access to will be available in your case list. All assigned cases can be accessed from the Interfolio homepage under My Tasks or from the Case List.

1. From the Interfolio homepage select **Cases** under the Promotion, Tenure, and Reappointment lefthand navigation bar.

You will see a list of cases that are available to you. You can filter this list by unit, case type, and status using the headings.

2. Click the name of the candidate to view case materials. This will open the Case Summary Page.



Cases

Search cases

1 of 1 cases

Navigating the Case Summary Page

Clicking on the name of the candidate will direct you to the Case Summary Page, where you can access materials and forms available to reviewers, and view materials submitted by a candidate.

The case page is a tabbed interface, **Case Materials** and **Case Details**.

3. The case will open on the Case Materials tab. Navigate to the **Case Details** tab and read the *Instructions* and *Required Items* for the stage of review.

Instructions will include necessary information on what is expected of reviewers at this stage and *Required Items* confirms materials the review stage is expected to attach to the request.

Jonathan Husky Send Case Case Options

Unit
Animal Science

Template
SCHOOL_DEPT_Promotion and Tenure

Status
Select Status

Case Materials **Case Details**

Reviewing as
Test Head

Instructions

The Department Head will utilize the list of recommended reviewers provided by the faculty member, adding recommendations from the head and departmental advisory committee, to solicit external letters of recommendation.

Navigate to the External Letters of Recommendation section of the dossier and follow the instructions in the Reviewer Job Aid. [\[link\]](#)

The Department Head should utilize the [Tenure-Track External Letter Request Template](#) and provide the faculty member's provided materials.

At a later stage, the Department Head will update the [External Letters of Reference Summary](#) based on received letters to the Department Head Recommendation section.

At this stage, the department head should also notify any secondary appointment supervisors of the candidate's intention to be reviewed for promotion and tenure in the coming PTR cycle to provide ample time to provide an evaluation.

The department head should send the case forward to the departmental review committee at any time after external letters of recommendation have been received. The faculty member will complete the Candidate Dossier section by August 23 and the active review step will gain access to provided materials for review.

4. After reading the instructions, navigate to the **Case Materials** tab.

The Case Materials tab includes *Internal Sections* and the *Candidate Packet*.

Jonathan Husky

Unit

Animal Science

[Case Materials](#)

[Case Details](#)

Internal Sections are case sections available to committee members reviewing the case and cannot be viewed by the candidate. Here you will find materials you may need as part of your review such as previous committee evaluations and external evaluations.

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

External Evaluations Request Evaluation Add File

Materials

| Title | Details | Actions |
|---|------------------------------------|----------------------|
| <input type="checkbox"/> Evaluation from Test Evaluator | Requested Jul 22, 2022 | Edit |
| <input type="checkbox"/> TEST_External Eval_Husky, Jonathan | Added by Test Head Jul 22, 2022 | Edit |

> Departmental Promotion, Tenure, and Reappointment Advisory Committee Recommendation Edit Add File

> Joint and Secondary Appointment Supervisor Recommendation Edit Add File

> Department Head Recommendation Edit Add File

> Dean's Advisory Council Recommendation Edit Add File

> Dean Recommendation Edit Add File

> Provost Recommendation Edit Add File

Candidate Packet contains materials added to the case by the candidate and any required forms completed by the candidate. The Candidate Packet is broken up into two sections with two separate deadlines: **Faculty Recommendation – External Letters of Recommendation** and **Candidate Dossier**.

1. Faculty Recommendation – External Letters of Recommendation – Faculty will upload necessary materials to aid the department in soliciting external evaluations. This should be submitted in the summer in advance of the final submission of the dossier.

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.

External Letters of Recommendation Locked

Due: Jul 1, 2022

[Unlock](#)

Both the faculty member and the Department Head and/or the Departmental Promotion, Tenure, and Reappointment (PTR) Advisory Committee, should each create a list of five or more names of potential external reviewers. The Department Head will request at least half of the total number of letters from names on the faculty member list. The remaining letters should be requested from the Department Head and/or the Departmental Promotion, Tenure, and Reappointment (PTR) Advisory Committee list.

Reference letters should be obtained from tenured faculty, or scholars of equivalent stature, in the faculty member's field outside of the university who can speak to his or her professional contribution to scholarship and/or creative accomplishments. It is important to solicit an impartial evaluation of the faculty member's contributions to the field. These external letters should not be from close acquaintances, former mentors, or frequent collaborators.

The candidate must provide:

- Complete curriculum vita;
- Any major publications or creative works to be shared with external evaluators;
- Name, Title, Institution, and contact information for external reviewers recommended by the faculty member. The department head and departmental PTR advisory committee may supplement this list.

Curriculum Vitae 1 required

[Add File](#)

| Title | Details | Actions |
|--|---|----------------------|
| <input type="checkbox"/> TEST_CV_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

Major Publications or Creative Work 1+ required

[Add File](#)

| Title | Details | Actions |
|---|---|----------------------|
| <input type="checkbox"/> TEST_Major Pubs or Creative Work_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

External Letters of Reference - Faculty Recommendations 1 required

[Add File](#)

| Title | Details | Actions |
|--|---|----------------------|
| <input type="checkbox"/> TEST_External Reviewers, Faculty Recs_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

2. Candidate Dossier – Faculty will formally submit the PTR form and supporting documents to the department by the deadline of August 23.

▼ **Candidate Dossier** Locked Unlock
Due: Aug 23, 2022

It is the responsibility of the faculty member wishing to be considered for promotion, tenure, and/or reappointment to complete the Promotion, Tenure, and Reappointment (PTR) form or PR form and submit this to the Department Head along with any supporting documentation he or she chooses to include or as may be required by the school/college and departmental procedures. These documents become the faculty member's dossier. The faculty member's Promotion, Tenure, and Reappointment (PTR) File consists of his or her dossier plus all other written materials accumulated as part of the Promotion, Tenure, and Reappointment (PTR) process.

PTR Form 1 required Add File

| Title | Details | Actions |
|--|---|---------|
| <input type="checkbox"/> TEST_PTR Form_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

Section One: B. Courses Taught and C. Evaluation of Teaching 1+ required Add File

| Title | Details | Actions |
|--|---|---------|
| <input type="checkbox"/> TEST_1B Courses Taught and Teaching Evals_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

COVID-19 Impact Statement up to 1 optional Add File

| Title | Details | Actions |
|---|---|---------|
| <input type="checkbox"/> TEST_COVID-19 Impact Statement_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

Supporting Materials optional Add File

| Title | Details | Actions |
|--|---|---------|
| <input type="checkbox"/> TEST_Other Supporting Materials_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

Appointment Letter 1 required Add File

| Title | Details | Actions |
|--|---|---------|
| <input type="checkbox"/> TEST_Appointment Letter_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

Curriculum Vitae (optional) up to 1 optional Add File

| Title | Details | Actions |
|--|---|---------|
| <input type="checkbox"/> TEST_CV_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

Previous Correspondence optional Add File

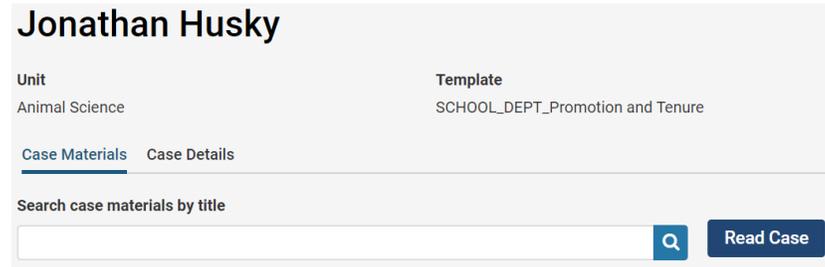
No files have been submitted.

Read and Evaluate Case Materials

Reviewers can either open individual documents from the Case Materials tab or read the case in document reader.

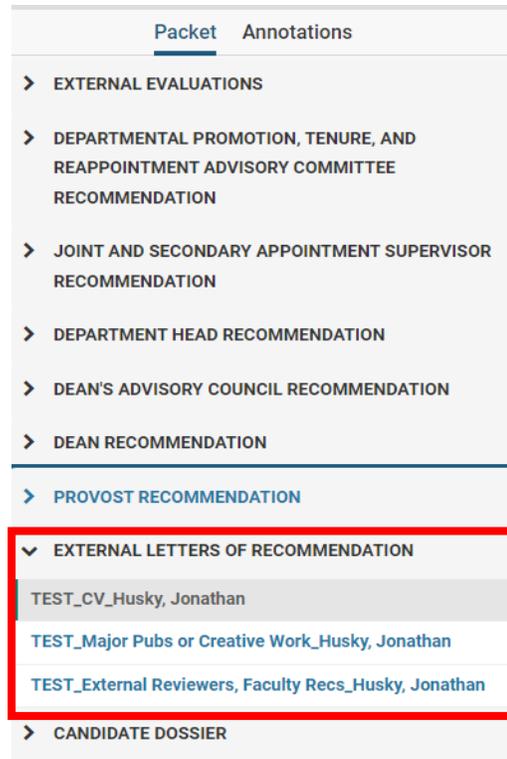
View the Entire Case in Document Reader

1. From the Case Materials tab, select **Read Case**.



The screenshot shows the top section of a case page for Jonathan Husky. It includes the name 'Jonathan Husky' at the top. Below the name, there are two columns: 'Unit' with the value 'Animal Science' and 'Template' with the value 'SCHOOL_DEPT_Promotion and Tenure'. There are two tabs: 'Case Materials' (which is selected and underlined) and 'Case Details'. Below the tabs is a search bar with the placeholder text 'Search case materials by title' and a magnifying glass icon. To the right of the search bar is a dark blue button labeled 'Read Case'.

2. Navigate through the packet to view materials submitted in each section of the dossier, both materials submitted by previous levels of review and the candidate's original submission.



The screenshot shows the 'Packet' tab of the dossier. It contains a list of sections, each with a right-pointing chevron icon. The sections are: 'EXTERNAL EVALUATIONS', 'DEPARTMENTAL PROMOTION, TENURE, AND REAPPOINTMENT ADVISORY COMMITTEE RECOMMENDATION', 'JOINT AND SECONDARY APPOINTMENT SUPERVISOR RECOMMENDATION', 'DEPARTMENT HEAD RECOMMENDATION', 'DEAN'S ADVISORY COUNCIL RECOMMENDATION', 'DEAN RECOMMENDATION', 'PROVOST RECOMMENDATION', 'EXTERNAL LETTERS OF RECOMMENDATION', and 'CANDIDATE DOSSIER'. The 'EXTERNAL LETTERS OF RECOMMENDATION' section is expanded, showing three items: 'TEST_CV_Husky, Jonathan', 'TEST_Major Pubs or Creative Work_Husky, Jonathan', and 'TEST_External Reviewers, Faculty Recs_Husky, Jonathan'. A red box highlights this expanded section, and a red arrow points from the text on the right towards it.

Materials uploaded by the candidate will be available in PDF view mode.

View Individual Case Materials from the Candidate Materials Tab

1. Scroll to the **Candidate Packet** section and review the materials provided by the faculty member by selecting the hyperlink for each file.

This will open the individual document in document reader.

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.

External Letters of Recommendation **Locked** Due: Jul 1, 2022 [Unlock](#)

Both the faculty member and the Department Head and/or the Departmental Promotion, Tenure, and Reappointment (PTR) Advisory Committee, should each create a list of five or more names of potential external reviewers. The Department Head will request at least half of the total number of letters from names on the faculty member list. The remaining letters should be requested from the Department Head and/or the Departmental Promotion, Tenure, and Reappointment (PTR) Advisory Committee list.

Reference letters should be obtained from tenured faculty, or scholars of equivalent stature, in the faculty member's field outside of the university who can speak to his or her professional contribution to scholarship and/or creative accomplishments. It is important to solicit an impartial evaluation of the faculty member's contributions to the field. These external letters should not be from close acquaintances, former mentors, or frequent collaborators.

The candidate must provide:

- Complete curriculum vita;
- Any major publications or creative works to be shared with external evaluators;
- Name, Title, Institution, and contact information for external reviewers recommended by the faculty member. The department head and departmental PTR advisory committee may supplement this list.

Curriculum Vitae 1 required [Add File](#)

| Title | Details | Actions |
|--|---|----------------------|
| <input type="checkbox"/> TEST_CV_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

Major Publications or Creative Work 1+ required [Add File](#)

| Title | Details | Actions |
|---|---|----------------------|
| <input type="checkbox"/> TEST_Major Pubs or Creative Work_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

External Letters of Reference - Faculty Recommendations 1 required [Add File](#)

| Title | Details | Actions |
|--|---|----------------------|
| <input type="checkbox"/> TEST_External Reviewers, Faculty Recs_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

← Select each file to view.

Requesting External Evaluations

Interfolio Job Aid: Requesting External Evaluations

There are two ways to add external evaluations to a case – Committee Managers and Administrators can upload an evaluation from their computer to a candidate's case, or, Committee Managers and Administrators can request evaluations through the Interfolio program.

Create a New External Evaluation Request

Interfolio Job Aid: Request and External Evaluation through an RPT Case/Add an External Evaluation to the Case of a Candidate

Administrators and Committee managers can add or request evaluations from scholars. External evaluations can be uploaded by an Administrator or Committee manager OR evaluations can be requested from one or more external evaluators through the Interfolio PTR module and the evaluator will receive an email with instructions to upload the evaluation directly to Interfolio.

Request an External Evaluation through the External Evaluations section in Interfolio PTR module

1. From the Interfolio homepage or the **Cases** tab under the Promotion, Tenure, and Reappointment lefthand navigation, open the case by selecting the employee's name.

Cases

Search cases

1 of 1 cases

| Name | Type | Template Name | Status |
|--|-------|----------------------------------|--------|
| <input type="checkbox"/> Jonathan Husky Animal Science | Other | SCHOOL_DEPT_Promotion and Tenure | |

Step 1 of 8: Solicitation of External Letters of Review (Department Head) | Sep 6, 2022

2. The case will open on the **Case Materials** tab. Navigate to the **Case Details** tab and read the Instructions.

Jonathan Husky

Send Case ▾ Case Options ▾

| | | |
|-------------------------------|---|--------------------------------|
| Unit Animal Science | Template SCHOOL_DEPT_Promotion and Tenure | Status Select Status |
|-------------------------------|---|--------------------------------|

Case Materials **Case Details**

Reviewing as
Test Head

▾ **Instructions**

The Department Head will utilize the list of recommended reviewers provided by the faculty member, adding recommendations from the head and departmental advisory committee, to solicit external letters of recommendation.

Navigate to the External Letters of Recommendation section of the dossier and follow the instructions in the Reviewer Job Aid. [\[link\]](#)

The Department Head should utilize the [Tenure-Track External Letter Request Template](#) and provide the faculty member's provided materials.

At a later stage, the Department Head will update the [External Letters of Reference Summary](#) based on received letters to the Department Head Recommendation section.

At this stage, the department head should also notify any secondary appointment supervisors of the candidate's intention to be reviewed for promotion and tenure in the coming PTR cycle to provide ample time to provide an evaluation.

The department head should send the case forward to the departmental review committee at any time after external letters of recommendation have been received. The faculty member will complete the Candidate Dossier section by August 23 and the active review step will gain access to provided materials for review.

3. After reading the instructions, navigate to the **Case Materials** tab.

Jonathan Husky

Unit

Animal Science

Case Materials

Case Details

4. Scroll to the **Candidate Packet** section and review the materials provided by the faculty member in the **Faculty Recommendation – External Letters of Recommendation** section.

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.

External Letters of Recommendation Locked

Due: Jul 1, 2022

 [Unlock](#)

Both the faculty member and the Department Head and/or the Departmental Promotion, Tenure, and Reappointment (PTR) Advisory Committee, should each create a list of five or more names of potential external reviewers. The Department Head will request at least half of the total number of letters from names on the faculty member list. The remaining letters should be requested from the Department Head and/or the Departmental Promotion, Tenure, and Reappointment (PTR) Advisory Committee list.

Reference letters should be obtained from tenured faculty, or scholars of equivalent stature, in the faculty member's field outside of the university who can speak to his or her professional contribution to scholarship and/or creative accomplishments. It is important to solicit an impartial evaluation of the faculty member's contributions to the field. These external letters should not be from close acquaintances, former mentors, or frequent collaborators.

The candidate must provide:

- Complete curriculum vita;
- Any major publications or creative works to be shared with external evaluators;
- Name, Title, Institution, and contact information for external reviewers recommended by the faculty member. The department head and departmental PTR advisory committee may supplement this list.

Curriculum Vitae 1 required

[Add File](#)

| Title | Details | Actions |
|--|---|----------------------|
| <input type="checkbox"/> TEST_CV_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

← Select each file to view.

Major Publications or Creative Work 1+ required

[Add File](#)

| Title | Details | Actions |
|---|---|----------------------|
| <input type="checkbox"/> TEST_Major Pubs or Creative Work_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

External Letters of Reference - Faculty Recommendations 1 required

[Add File](#)

| Title | Details | Actions |
|--|---|----------------------|
| <input type="checkbox"/> TEST_External Reviewers, Faculty Recs_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

Alternatively, select **Read Case** at the top of the Case Summary in the Case Materials tab to view all previously submitted materials in review mode.

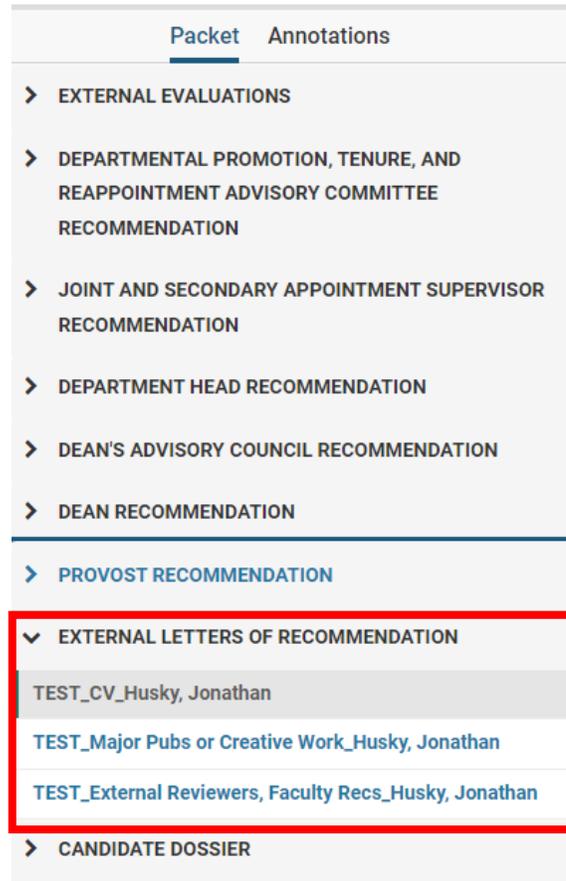
Navigate through the packet to view materials submitted in the **Faculty Recommendations – External Letters of Recommendation** section of the dossier.



Case Materials Case Details

Search case materials by title

Read Case



Packet Annotations

- > EXTERNAL EVALUATIONS
- > DEPARTMENTAL PROMOTION, TENURE, AND REAPPOINTMENT ADVISORY COMMITTEE RECOMMENDATION
- > JOINT AND SECONDARY APPOINTMENT SUPERVISOR RECOMMENDATION
- > DEPARTMENT HEAD RECOMMENDATION
- > DEAN'S ADVISORY COUNCIL RECOMMENDATION
- > DEAN RECOMMENDATION
- > PROVOST RECOMMENDATION
- ▼ EXTERNAL LETTERS OF RECOMMENDATION
 - TEST_CV_Husky, Jonathan
 - TEST_Major Pubs or Creative Work_Husky, Jonathan
 - TEST_External Reviewers, Faculty Recs_Husky, Jonathan
- > CANDIDATE DOSSIER

Materials uploaded by the candidate will be available in PDF view mode.

5. After compiling a list of external reviewers, inclusive of the faculty member's recommendations and the department head and/or departmental PTR committee's recommendations, navigate to the **Internal Sections** section in the **Case Materials** tab to the External Evaluations dropdown.

Select **Request Evaluation**.

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

External Evaluations

Request Evaluation

Add File

Materials

No files have been added to this section.

6. Enter the name and email of the external evaluators on the Request External Evaluation page.

Note that you can click **Add Another Evaluator** to request letters from multiple evaluators at the same time.

External Evaluator Information

| | | |
|---|--|--|
| First Name * | Last Name * | Email Address * |
| <input type="text" value="First Name"/> | <input type="text" value="Last Name"/> | <input type="text" value="Email Address"/> |

[+ Add Another Evaluator](#)

7. Enter an email message to the evaluator. Your request can include a personal message to the evaluator and set the From Name and Reply-to addresses, as appropriate.

Message to Evaluator
Use this message to request an evaluation of the candidate. Your request can include a personal message to the evaluator and documents to aid the evaluator in their review. Once completed, evaluators submit their reviews through Interfolio's secure delivery system.

From Name
Department Head Name

Reply-to
dept_head_email@uconn.edu

Subject
Request for External Evaluation

Message

Dear Professor [Evaluator]:

8. Attach files to the request email.
Click **Add Files** in the Files section of the request form. Select files from the list of files added to the case by the candidate.

Files

Files you add here can be downloaded by the recipient when they accept the invitation to provide an evaluation.

There are no files included in this request.

+ Add Files

Add to Evaluation Request ✕

Search

Name

- TEST_CV_Husky, Jonathan
- TEST_Major Pubs or Creative Work_Husky, Jonathan
- TEST_External Reviewers, Faculty Recs_Husky, Jonathan
- TEST_PTR Form_Husky, Jonathan
- TEST_1B Courses Taught and Teaching Evals_Husky, Jonathan
- TEST_COVID-19 Impact Statement_Husky, Jonathan
- TEST_Other Supporting Materials_Husky, Jonathan
- TEST_Appointment Letter_Husky, Jonathan
- TEST_CV_Husky, Jonathan

+ Add Files Cancel

Materials uploaded to the case by the faculty member will be available here and can be shared with external evaluators.

9. Set response settings.

- a. Indicate the hard deadline after which the recipient will not be able to submit an evaluation. An Administrator or Committee Manager can still manually upload an evaluation after this date.
- b. Indicate whether or not the evaluator can submit additional files.
- c. Choose who can access the request and the evaluation once uploaded. The default access level is Administrators & Entire Committee. Alternative options are Administrators & Committee Managers or Administrators Only.

10. Click **Send Request**. The request, its status, and the evaluation once uploaded will appear in the **External Evaluations** section.

Response Settings

Deadline

The recipient will not be able to submit an evaluation after the deadline date.

Mmm d, yyyy



Can the evaluator submit additional files? *

Indicate whether or not you want to allow the evaluator to submit additional supporting materials, such as a CV, along with the requested file?



Yes, allow the evaluator to submit additional files.



No

Access *

Choose who has access to this document.

Administrators & Entire Committee



Send Request

Cancel

11. Navigate to the **Case Summary** in the **Case Materials** tab at any time to view the status of the request.

External Evaluators may be directed to the [Interfolio Job Aid: Guide to Providing Requested Evaluations in Interfolio Review, Promotion and Tenure.](#)

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

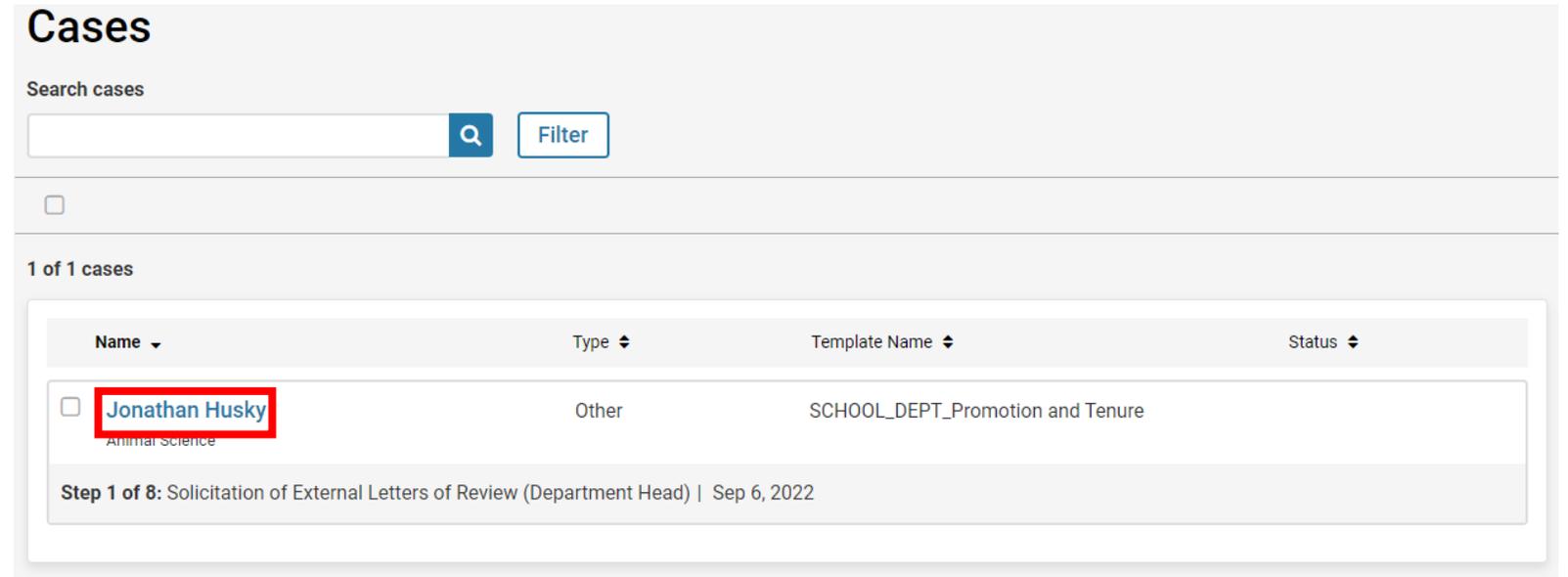
External Evaluations [Request Evaluation](#) [Add File](#)

Materials

| Title | Details | Actions |
|---|---------------------------|----------------------|
| <input type="checkbox"/> Evaluation from Test Evaluator | Requested Jul 22, 2022 | Edit |

Manually Upload an External Evaluation

1. From the Interfolio homepage or the **Cases** tab under the Promotion, Tenure, and Reappointment lefthand navigation, open the case by selecting the employee's name.



Cases

Search cases

1 of 1 cases

| Name | Type | Template Name | Status |
|--|-------|----------------------------------|--------|
| <input type="checkbox"/> Jonathan Husky <small>Animal Science</small> | Other | SCHOOL_DEPT_Promotion and Tenure | |

Step 1 of 8: Solicitation of External Letters of Review (Department Head) | Sep 6, 2022

2. The case will open on the **Case Materials** tab. Navigate to the **Case Details** tab and read the Instructions.

Jonathan Husky

Send Case ▾ **Case Options** ▾

| Unit | Template | Status |
|----------------|----------------------------------|---------------|
| Animal Science | SCHOOL_DEPT_Promotion and Tenure | Select Status |

Case Materials **Case Details**

Reviewing as
Test Head

▾ **Instructions**

The Department Head will utilize the list of recommended reviewers provided by the faculty member, adding recommendations from the head and departmental advisory committee, to solicit external letters of recommendation.

Navigate to the External Letters of Recommendation section of the dossier and follow the instructions in the Reviewer Job Aid. [\[link\]](#)

The Department Head should utilize the [Tenure-Track External Letter Request Template](#) and provide the faculty member's provided materials.

At a later stage, the Department Head will update the [External Letters of Reference Summary](#) based on received letters to the Department Head Recommendation section.

At this stage, the department head should also notify any secondary appointment supervisors of the candidate's intention to be reviewed for promotion and tenure in the coming PTR cycle to provide ample time to provide an evaluation.

The department head should send the case forward to the departmental review committee at any time after external letters of recommendation have been received. The faculty member will complete the Candidate Dossier section by August 23 and the active review step will gain access to provided materials for review.

3. After reading the instructions, navigate to the **Case Materials** tab.

Jonathan Husky

Unit

Animal Science

Case Materials

Case Details

4. Scroll to the **Candidate Packet** section and review the materials provided by the faculty member in the **Faculty Recommendation – External Letters of Recommendation** section.

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.

External Letters of Recommendation Locked

Due: Jul 1, 2022

 [Unlock](#)

Both the faculty member and the Department Head and/or the Departmental Promotion, Tenure, and Reappointment (PTR) Advisory Committee, should each create a list of five or more names of potential external reviewers. The Department Head will request at least half of the total number of letters from names on the faculty member list. The remaining letters should be requested from the Department Head and/or the Departmental Promotion, Tenure, and Reappointment (PTR) Advisory Committee list.

Reference letters should be obtained from tenured faculty, or scholars of equivalent stature, in the faculty member's field outside of the university who can speak to his or her professional contribution to scholarship and/or creative accomplishments. It is important to solicit an impartial evaluation of the faculty member's contributions to the field. These external letters should not be from close acquaintances, former mentors, or frequent collaborators.

The candidate must provide:

- Complete curriculum vita;
- Any major publications or creative works to be shared with external evaluators;
- Name, Title, Institution, and contact information for external reviewers recommended by the faculty member. The department head and departmental PTR advisory committee may supplement this list.

Curriculum Vitae 1 required

[Add File](#)

| Title | Details | Actions |
|--|---|----------------------|
| <input type="checkbox"/> TEST_CV_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

← Select each file to view.

Major Publications or Creative Work 1+ required

[Add File](#)

| Title | Details | Actions |
|---|---|----------------------|
| <input type="checkbox"/> TEST_Major Pubs or Creative Work_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

External Letters of Reference - Faculty Recommendations 1 required

[Add File](#)

| Title | Details | Actions |
|--|---|----------------------|
| <input type="checkbox"/> TEST_External Reviewers, Faculty Recs_Husky, Jonathan | Submitted by Jonathan Husky Jun 30, 2022 | Edit |

Alternatively, select **Read Case** at the top of the Case Summary in the **Case Materials** tab to view all previously submitted materials in review mode.

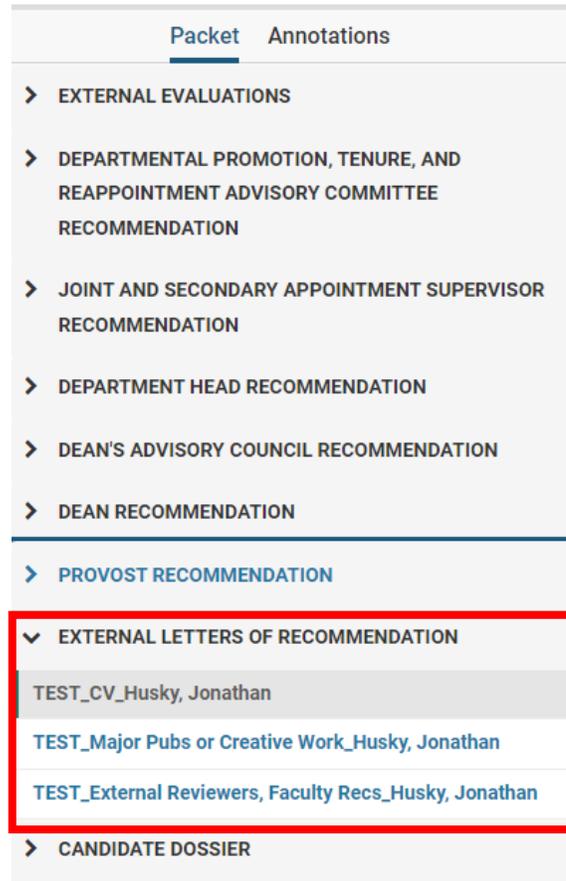
Navigate through the packet to view materials submitted in the **Faculty Recommendations – External Letters of Recommendation** section of the dossier.



Case Materials Case Details

Search case materials by title

Read Case



Packet Annotations

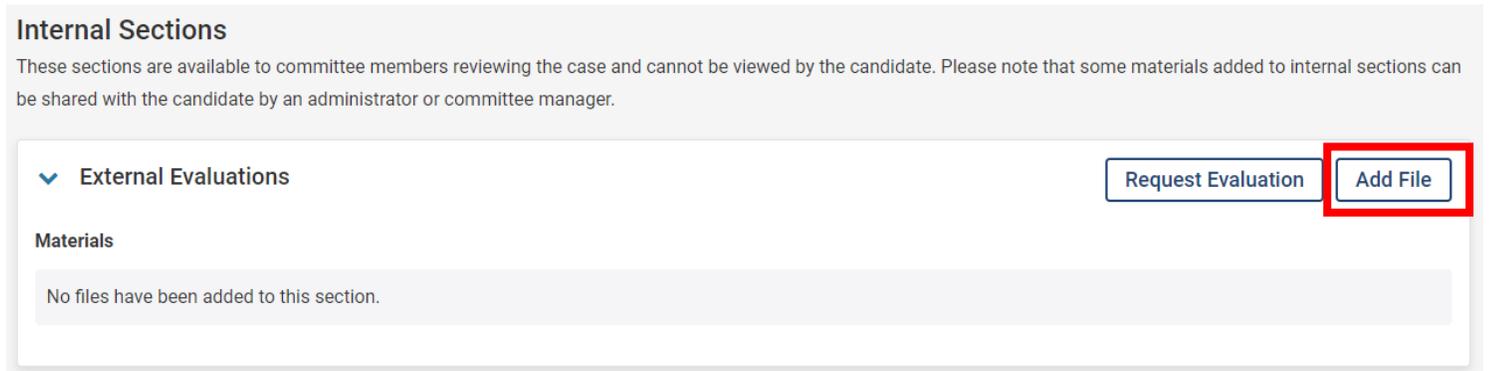
- > EXTERNAL EVALUATIONS
- > DEPARTMENTAL PROMOTION, TENURE, AND REAPPOINTMENT ADVISORY COMMITTEE RECOMMENDATION
- > JOINT AND SECONDARY APPOINTMENT SUPERVISOR RECOMMENDATION
- > DEPARTMENT HEAD RECOMMENDATION
- > DEAN'S ADVISORY COUNCIL RECOMMENDATION
- > DEAN RECOMMENDATION
- > PROVOST RECOMMENDATION
- ✓ EXTERNAL LETTERS OF RECOMMENDATION
 - TEST_CV_Husky, Jonathan
 - TEST_Major Pubs or Creative Work_Husky, Jonathan
 - TEST_External Reviewers, Faculty Recs_Husky, Jonathan
- > CANDIDATE DOSSIER

Materials uploaded by the candidate will be available in PDF view mode.

5. After compiling a list of external reviewers, inclusive of the faculty member's recommendations and the department head and/or departmental PTR committee's recommendations, the department head may solicit external evaluations via email.

6. To upload an evaluation provided via email, navigate to the **Internal Sections** section in the **Case Materials** tab to the External Evaluations dropdown.

Select **Add File**.



Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

External Evaluations Request Evaluation Add File

Materials

No files have been added to this section.

7. Browse your computer to upload the external evaluation to the case. **Save.**

Add External Evaluation ✕

Files added to the External Evaluations section are confidential and can not be shared with the candidate.



Drag & Drop your files anywhere or

Browse To Upload

✓ Save

Cancel

8. The manually uploaded external evaluation will be reflected in the **Internal Sections** section under the External Evaluations heading. Note that the Details heading will indicate if the letter was uploaded by the Department Head or Administrator vs. uploaded directly by the external evaluator.

External Evaluations Request Evaluation Add File

Materials

| Title | Details | Actions |
|---|------------------------------------|----------------------|
| <input type="checkbox"/> Evaluation from Test Evaluator | Requested Jul 22, 2022 | Edit |
| <input type="checkbox"/> TEST_External Eval_Husky, Jonathan | Added by Test Head Jul 22, 2022 | Edit |

Letter requested from external reviewer

Letter uploaded by Department Head

Edit and Resend an External Evaluation Request

[Interfolio Job Aid: Manage External Evaluations: Send Reminders, Cancel, Change Viewing Permissions](#)

Committee Managers and Administrators can edit the settings of an external evaluation request, edit and resend an external evaluation request, cancel a request, and remove and replace letters on behalf of an evaluator.

Edit the settings of an external evaluation request

The Committee Manager or Administrator can amend the Material Name, Section, and Access to a request.

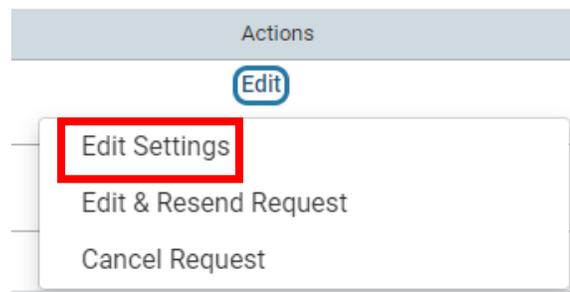
1. Navigate to the Case Summary and scroll to the External Evaluations section.
2. Select **Edit**.

If the request was either Accepted or Declined by the evaluator, resending the request will not change the disposition.

3. Select **Edit Settings** from the dropdown.



| External Evaluations | | | Request Evaluation | Add File |
|---|------------------------------------|-------------|--------------------|----------|
| Materials | | | | |
| Title | Details | Actions | | |
| <input type="checkbox"/> Evaluation from Test Evaluator | Requested Jul 22, 2022 | Edit | | |
| <input type="checkbox"/> TEST_External Eval_Husky, Jonathan | Added by Test Head Jul 22, 2022 | Edit | | |



4. Edit the **Evaluation Settings** to make changes to the material name, section of the dossier the file will be added to when uploaded, and access levels of the uploaded evaluation.

Material Name is the title that will appear on the case page when an evaluation is uploaded to the dossier.

All External Evaluations should be designated to upload to the External Evaluations section of the dossier.

By default, Administrators & Committee Members/Managers can view uploaded evaluations.

5. **Save Settings.**

Manage External Evaluation

Evaluation Settings

Material Name *

Evaluation from Test Evaluator

Section *

This setting allows you to move this file to a different internal section.

External Evaluations

Access *

This setting places limits on who can see this evaluation

Administrators & Entire Committee

Save Settings

Cancel

Edit and Resend an External Evaluation Request

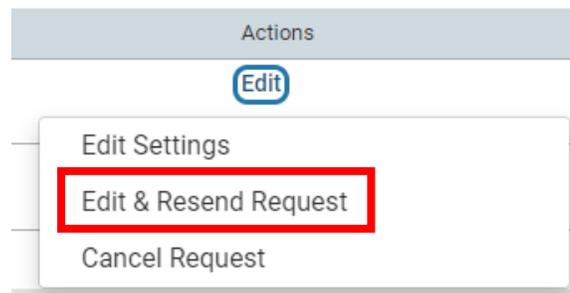
The Committee Manager or Administrator can amend the external evaluators name, email address, the message, and add or remove attached files on a request and resend to the external evaluator.

1. Navigate to the Case Summary and scroll to the External Evaluations section.
2. Select **Edit**.



| External Evaluations | | | Request Evaluation | Add File |
|---|------------------------------------|----------------------|--------------------|----------|
| Materials | | | | |
| Title | Details | Actions | | |
| <input type="checkbox"/> Evaluation from Test Evaluator | Requested Jul 22, 2022 | Edit | | |
| <input type="checkbox"/> TEST_External Eval_Husky, Jonathan | Added by Test Head Jul 22, 2022 | Edit | | |

3. Select **Edit & Resend Request** from the dropdown.



4. Make any changes to the request, including the evaluator's name, email address, the invitation message, and add or remove attached files.

Evaluators will lose access to any files removed from the resent request.

Re-send External Evaluation

External Evaluator Information

| | | |
|-----------------------------------|--|--|
| First Name * | Last Name * | Email Address * |
| <input type="text" value="Test"/> | <input type="text" value="Evaluator"/> | <input type="text" value="provost@uconn.edu"/> |

Message to Evaluator

You can re-send your evaluation request with the same information to remind your external evaluators of what's ahead; or, you can edit any field and re-send in order to provide your external evaluator with additional information, documents, or a changed due date. You must send the request to make any changes apparent to the evaluator.

| | |
|--|--|
| From Name | Reply-to |
| <input type="text" value="University of Connecticut"/> | <input type="text" value="provost@uconn.edu"/> |
| Subject | |
| <input type="text" value="TEST - External Eval Request"/> | |
| Message | |
| <p></p> <div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div> | |
| Preview Email | |

Files

Files you add here can be downloaded by the recipient when they accept the invitation to provide an evaluation.

| Name | Actions |
|-------------------------|------------------------|
| TEST_CV_Husky, Jonathan | Remove |

[+ Add Files](#)

5. Under **Response Settings**, make any edits to the deadline, allow or disallow the submission of additional files, and set who can view the evaluation once it comes in.

Response Settings

Deadline
The recipient will not be able to submit an evaluation after the deadline date.

Mmm d, yyyy  

Can the evaluator submit additional files? *
Indicate whether or not you want to allow the evaluator to submit additional supporting materials, such as a CV, along with the requested file?

Yes, allow the evaluator to submit additional files.

No

Access *
Choose who has access to this document.

Administrators & Entire Committee 

6. Send.

Cancel a Request

The Committee Manager or Administrator can cancel any requests with a “Requested” status. Once an evaluator has chosen to accept or decline a request, it can no longer be cancelled.

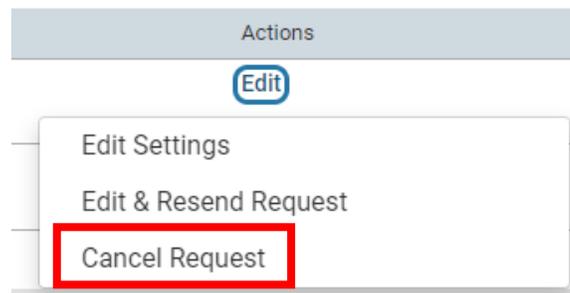
1. Navigate to the Case Summary and scroll to the External Evaluations section.
2. Select **Edit**.

External Evaluations Request Evaluation Add File

Materials

| Title | Details | Actions |
|---|------------------------------------|----------------------|
| <input type="checkbox"/> Evaluation from Test Evaluator | Requested Jul 22, 2022 | Edit |
| <input type="checkbox"/> TEST_External Eval_Husky, Jonathan | Added by Test Head Jul 22, 2022 | Edit |

3. Select **Cancel Request** from the dropdown.



4. Select **Yes** to confirm the cancellation.

Confirm



Anyone who can currently view this material (including external evaluators) will no longer have access to it. Are you sure you wish to delete this material?

Yes

No

Uploading Committee Requirements

[Interfolio Job Aid: Upload Documents to Satisfy Committee Requirements](#)

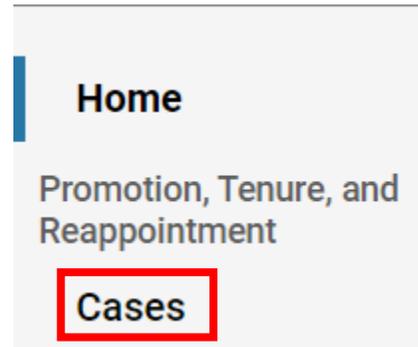
[Interfolio Job Aid: Completing & Submitting Committee Forms](#)

Only the designated Committee Manager or an Administrator can upload the committee's evaluation and move the case forward to the next stage of review. Only the Committee Manager can document the committee's vote.

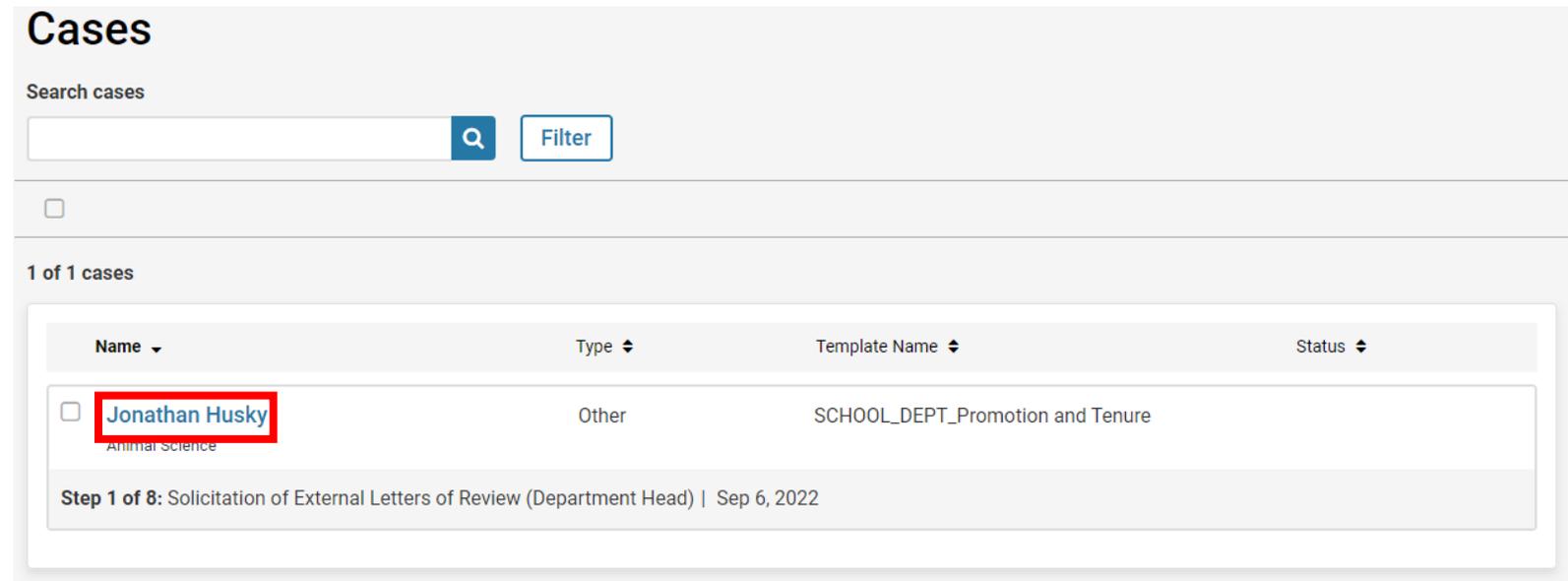
Uploading Committee Required Documents

The Committee Manager or an Administrator can upload required documents on behalf of the committee.

1. From the Interfolio homepage select **Cases** under the Promotion, Tenure, and Reappointment lefthand navigation bar.



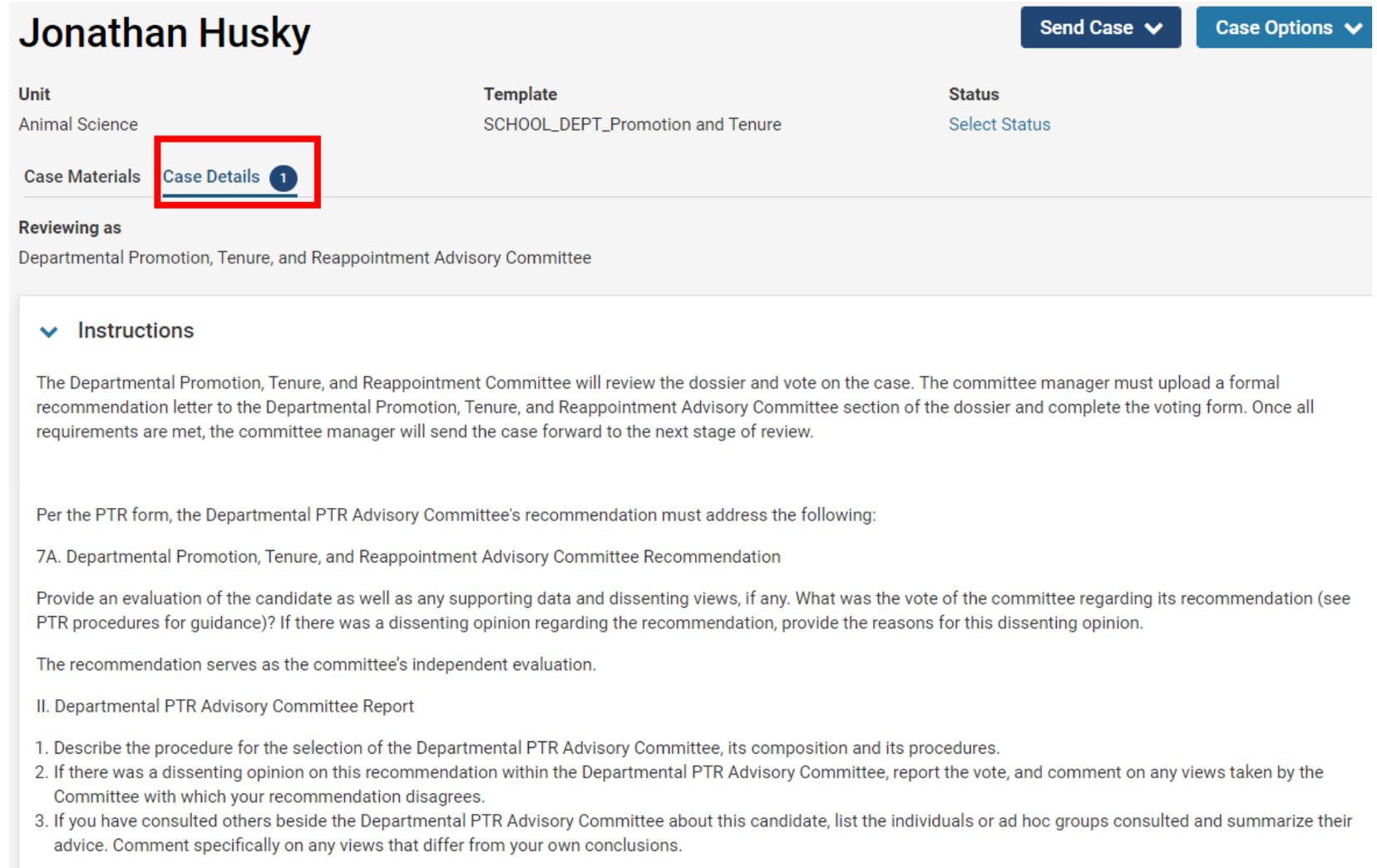
2. Click the name of the candidate to view case materials. This will open the Case Summary Page.



3. The case will open on the Case Materials tab. Navigate to the **Case Details** tab and read the Instructions.

The number next to Case Details indicates that there are committee requirements that have not been satisfied.

The **Instructions** will include necessary information on what is expected of reviewers at this stage and confirms materials the review stage is expected to attach to the request.



Jonathan Husky Send Case ▾ Case Options ▾

| Unit | Template | Status |
|----------------|----------------------------------|---------------|
| Animal Science | SCHOOL_DEPT_Promotion and Tenure | Select Status |

Case Materials **Case Details** 1

Reviewing as
Departmental Promotion, Tenure, and Reappointment Advisory Committee

▾ Instructions

The Departmental Promotion, Tenure, and Reappointment Committee will review the dossier and vote on the case. The committee manager must upload a formal recommendation letter to the Departmental Promotion, Tenure, and Reappointment Advisory Committee section of the dossier and complete the voting form. Once all requirements are met, the committee manager will send the case forward to the next stage of review.

Per the PTR form, the Departmental PTR Advisory Committee's recommendation must address the following:

7A. Departmental Promotion, Tenure, and Reappointment Advisory Committee Recommendation

Provide an evaluation of the candidate as well as any supporting data and dissenting views, if any. What was the vote of the committee regarding its recommendation (see PTR procedures for guidance)? If there was a dissenting opinion regarding the recommendation, provide the reasons for this dissenting opinion.

The recommendation serves as the committee's independent evaluation.

II. Departmental PTR Advisory Committee Report

1. Describe the procedure for the selection of the Departmental PTR Advisory Committee, its composition and its procedures.
2. If there was a dissenting opinion on this recommendation within the Departmental PTR Advisory Committee, report the vote, and comment on any views taken by the Committee with which your recommendation disagrees.
3. If you have consulted others beside the Departmental PTR Advisory Committee about this candidate, list the individuals or ad hoc groups consulted and summarize their advice. Comment specifically on any views that differ from your own conclusions.

4. Scroll to the **Required Items** section and review committee requirements.

In this case, note that the committee must upload the Departmental PTR Committee Recommendation and complete the Committee Voting Form.

5. Select **Add** next to the PTR committee recommendation.

Required Items 1 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Departmental Promotion, Tenure, and Reappointment Advisory Committee Recommendation + Add

Upload the departmental committee's recommendation on the case for promotion and tenure.

No files have been added to this section.

Forms

| Form Name | Assignee | Actions |
|---|-------------|------------------------------------|
| Committee Voting Form 4 required questions | No Assignee | Manage Respondents |

6. Browse to Upload a new file.

Add Departmental Promotion, Tenure, and Reappointment Advisory Committee Recommendation ✕

Upload a new file Select file from case



Drag & Drop your files anywhere or

Browse To Upload

+ Add

Cancel

7. Rename the document, as needed. Ensure that the document Section is the appropriate committee folder. In this instance, the Departmental PTR Committee Recommendation section.

8. Select **Add**.

The **Required Items** section on the **Case Details** tab will reflect that the requirement is Complete.

Add Departmental Promotion, Tenure, and Reappointment Advisory Committee Recommendation ✕

[Upload a new file](#) Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

| | |
|--|---|
| Name * TEST_Committee Eval_Husky, Jonathan | Section * Departmental Promotion, Tenure, and Reapp ▼ |
|--|---|



Rename the document, as needed, to something easily recognizable.



Ensure the document will be added to the appropriate internal case section.

| | |
|--------------|--------|
| + Add | Cancel |
|--------------|--------|

▼ Required Items

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Departmental Promotion, Tenure, and Reappointment Advisory Committee Recommendation

Upload the departmental committee's recommendation on the case for promotion and tenure.

Complete

Completing Committee Forms

Only the Committee Manager can complete required forms on behalf of the committee.

9. Scroll to the **Required Items** section and review committee requirements.

In addition to uploading the Departmental PTR Committee Recommendation, the Committee Manager must complete the Committee Voting Form.

10. Select **Fill Out Form** next to the Committee Voting Form.

The form should only be filled out once, by the Committee Manager. UConn does not utilize the “Manage Respondents” feature.

| Forms | | |
|---|---------------------|------------------------------------|
| Form Name | Assignee | Actions |
| Committee Voting Form 4 required questions | Committee Managers | Manage Respondents |
| Committee Voting Form 4 required questions | Test HeadComm (You) | Fill Out Form |

11. Complete the form by entering the number of committee members who participated in the vote that Support, Do Not Support, Abstain, or were Absent from the vote.

12. **Submit form.**

Committee Voting Form

Departmental PTR Committees and Dean's PTR Advisory Councils will utilize this form to document the committee's vote. This form will be completed by the committee manager.

Supports *

Indicate the number of eligible voting committee members who support the case for promotion and tenure. Indicate "0" if none.

Does Not Support *

Indicate the number of eligible voting committee members who do not support the case for promotion and tenure. Indicate "0" if none.

Abstain *

Indicate the number of eligible voting committee members who abstain from voting in the case for promotion and tenure. Indicate "0" if none.

Absent *

Indicate the number of eligible voting committee members absent from the committee's vote on the case for promotion and tenure. Indicate "0" if none.

Submit Form

Save Responses

[Return to Case](#)

↑
Submits form and satisfies committee requirement.

↑
Saves progress on form to complete later. Does not submit requirement.

13. When the form is submitted, select **Yes** to confirm your submission.

Confirm



Submitting the form "Committee Voting Form" will make your responses available to the appropriate members for review. You will be able to change or edit your responses while the case is at the current step.

Yes

No

14. To edit a form while the case is at the current step, select **Edit Submission**, make necessary changes to your responses, and re-submit form.

| Forms | | |
|---|---------------------|------------------------------------|
| Form Name | Assignee | Actions |
| Committee Voting Form 4 required questions | Committee Managers | Manage Respondents |
| Committee Voting Form 4 required questions | Test HeadComm (You) | Edit Submission |

Sending a Case Forward

Interfolio Job Aid: Move a Case Forward

When all Committee Required Items have been satisfied, the Committee Manager or Administrator can move the case forward to the next stage of review.

15. From the Case Summary Page, select **Send Case** from the top righthand options.

Jonathan Husky Send Case ▾ Case Options ▾

Unit
Animal Science

Template
SCHOOL_DEPT_Promotion and Tenure

Status
[Select Status](#)

[Case Materials](#) [Case Details](#)

Reviewing as
Departmental Promotion, Tenure, and Reappointment Advisory Committee

16. Select **Forward to**.

Send Case ▾

- Forward to**
Department Head Review
- Backwards to
Solicitation of External Letters of Review
(Department Head)

17. A list of all committees and reviewers gaining access to the next step will display, along with the option to enter a message to the reviewers gaining access to the case.

Deselect the checkbox next to “Send a message to the reviewers gaining access” if you do not wish to send a message. Regardless of whether a message is sent or not, when a committee member gains access to a case, a task for that case will display on their homepage.

18. Select **Continue**.

Send Case Forward ✕

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

Departmental Promotion, Tenure, and Reappointment Advisory Committee | 1 members

The following reviewers will gain access to the case:

Department Head | 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 *

Husky, Jonathan PTR Case

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.

Best,
Test HeadComm

19. You'll see a green popup box in the lefthand corner of your screen confirming that the case as been sent forward.

All reviewers who do not have access to the next level of review will lose access to the case.

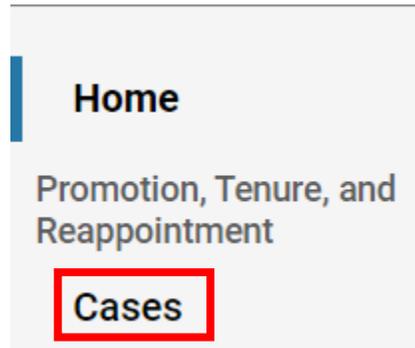


Sending Multiple Cases Forward in Bulk

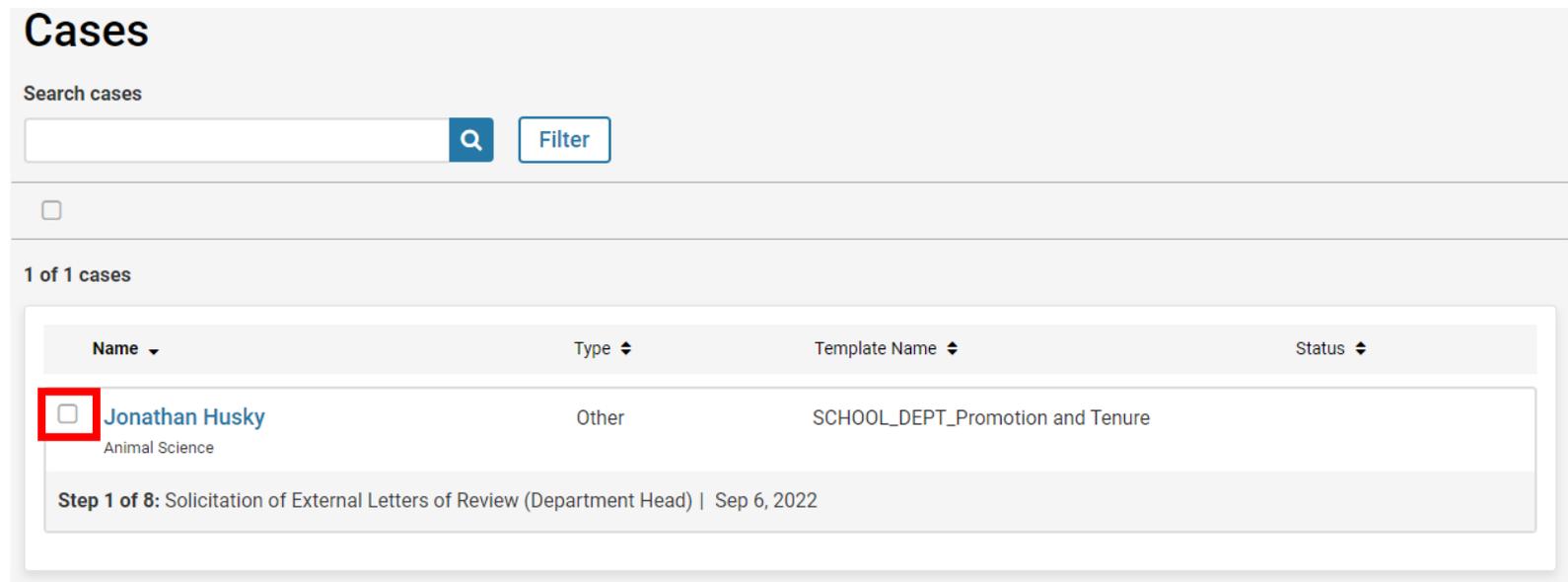
Interfolio Job Aid: Move a Case Forward

Committee Managers or Administrators can move multiple cases forward in bulk from the Case List.

1. From the Interfolio homepage select **Cases** under the Promotion, Tenure, and Reappointment lefthand navigation bar.



2. Select the cases from the Case List by clicking the checkbox next to each.



A screenshot of the Interfolio 'Cases' page. The page has a light gray header with the title 'Cases'. Below the title is a search bar with the placeholder text 'Search cases', a search icon, and a 'Filter' button. Below the search bar is a small square checkbox. Below that is the text '1 of 1 cases'. Below that is a table with columns: Name, Type, Template Name, and Status. The first row of the table is highlighted with a red rectangular box. The first row contains: a checkbox, 'Jonathan Husky' (with 'Animal Science' below it), 'Other', and 'SCHOOL_DEPT_Promotion and Tenure'. Below the table is a gray bar with the text 'Step 1 of 8: Solicitation of External Letters of Review (Department Head) | Sep 6, 2022'.

| Name | Type | Template Name | Status |
|---|-------|----------------------------------|--------|
| <input type="checkbox"/> Jonathan Husky Animal Science | Other | SCHOOL_DEPT_Promotion and Tenure | |

Step 1 of 8: Solicitation of External Letters of Review (Department Head) | Sep 6, 2022

3. Click **Send Forward** at the top of the case list to move selected cases forward.

Cases

Search cases

1 of 1 cases

| Name ▾ | Type ▾ |
|--|--------|
| <input checked="" type="checkbox"/> Jonathan Husky Animal Science | Other |

Step 2 of 8: Departmental Promotion, Tenure, and Reappointment Advisory Committee

4. A list of all committees and reviewers gaining access to the next step will display, along with the option to enter a message to the reviewers gaining access to the case.

Deselect the checkbox next to “Send a message to the reviewers gaining access” if you do not wish to send a message. Regardless of whether a message is sent or not, when a committee member gains access to a case, a task for that case will display on their homepage.

5. Select **Continue**.

Send Case Forward ✕

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

Departmental Promotion, Tenure, and Reappointment Advisory Committee | 1 members

The following reviewers will gain access to the case:

Department Head | 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 *

Husky, Jonathan PTR Case

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.

Best,
Test HeadComm

6. You'll see a green popup box in the lefthand corner of your screen confirming that the case as been sent forward.

All reviewers who do not have access to the next level of review will lose access to the case.



Uploading Dean and Department Head Requirements

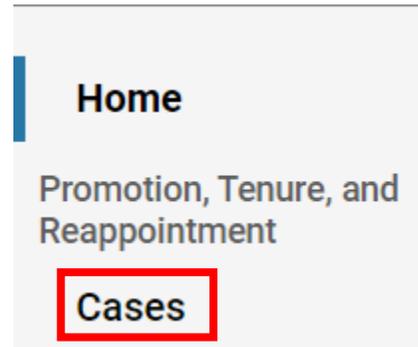
Interfolio Job Aid: Upload Documents to Satisfy Committee Requirements

Only the designated Committee Manager or an Administrator can upload the department head or dean's evaluation and move the case forward to the next stage of review. Only the designated Committee Manager can document the department head or dean's decision on the case.

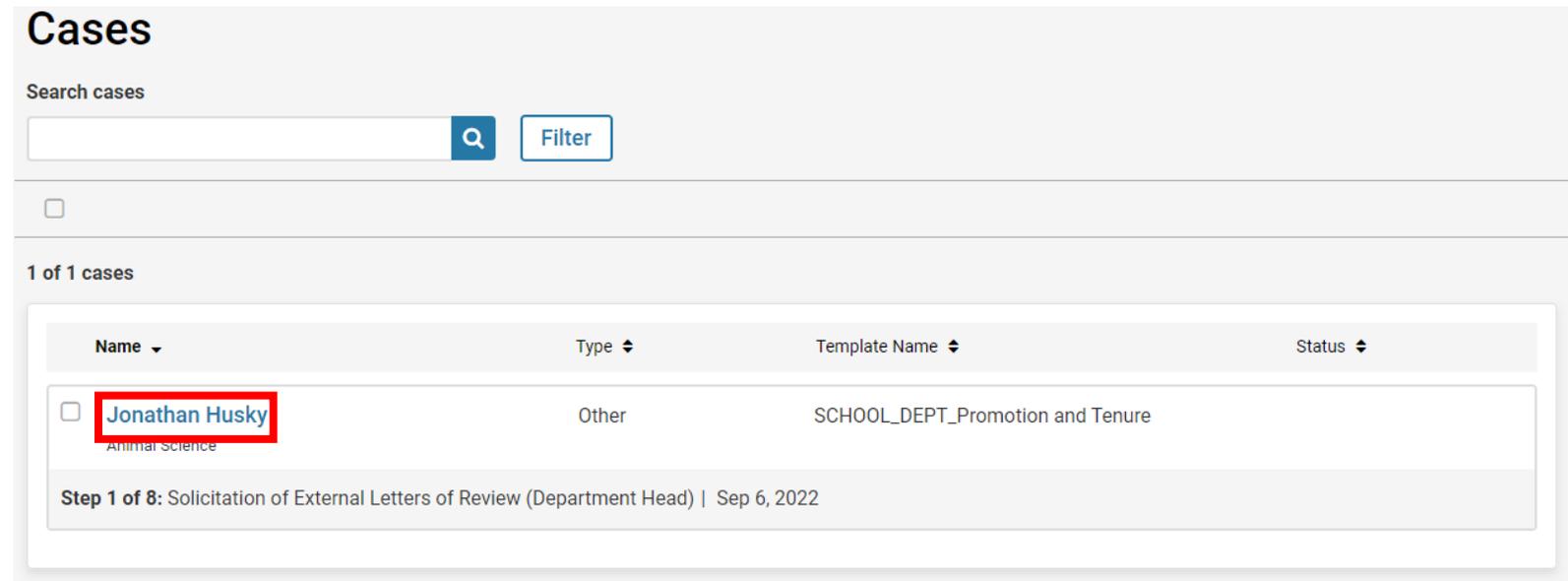
Uploading Dean and Department Head Required Documents

Only the Committee Manager (department head or dean) or an Administrator can upload required documents on behalf of the department head or dean.

1. From the Interfolio homepage select **Cases** under the Promotion, Tenure, and Reappointment lefthand navigation bar.



2. Click the name of the candidate to view case materials. This will open the Case Summary Page.



3. The case will open on the Case Materials tab. Navigate to the **Case Details** tab and read the Instructions.

The number next to Case Details indicates that there are committee requirements that have not been satisfied.

The *Instructions* will include necessary information on what is expected of reviewers at this stage and confirms materials the review stage is expected to attach to the request.

Jonathan Husky Send Case ▾ Case Options ▾

Unit: Animal Science Template: SCHOOL_DEPT_Promotion and Tenure Status: Select Status

Case Materials **Case Details** 4

Reviewing as
Department Head

Instructions

The department head will upload a copy of the letter used to solicit external evaluations, the external evaluations summary sheet to the External Evaluations section of the dossier. The department head will also upload any evaluations from secondary appointment supervisors to the Joint Appointment section of the dossier. The department head will attach an independent evaluation of the faculty member's case in the Department Head section of the dossier and complete the Department Head recommendation form. Once all requirements are met, the department head will send the case forward to the next stage of review.

Per the PTR form, the Joint Appointment supervisor and Department Head's recommendation must address the following:

7B. Joint Appointments

When a candidate holds a joint appointment (as indicated in Section 5) an evaluation from the other supervisor (e.g., regional campus director or associate vice provost, center or institute director, etc.) should be included here.

7C. Department Head's Recommendation

Provide your independent evaluation of the candidate's case, comparing and contrasting with the advice of the Departmental PTR Advisory Committee, and, in the case for tenure and promotion to associate or professor, the external letters

Your recommendation, while it should be informed by the information provided, serves as your own independent evaluation.

4. Scroll to the *Required Items* section and review committee requirements.

In this case, note that the Committee Manager must upload the Department Head Recommendation, Letter Used to Solicit External Evaluations, and External Letter Summary Sheet and complete the Dept Head and Dean Recommendation form.

5. Select **Add** next to each requirement.

Required Items 4 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Department Head Recommendation Add

Upload an evaluation letter summarizing the perspective of the departmental PTR committee, the joint appointment supervisor (if applicable), and the department head's independent evaluation of the faculty member's case for promotion and tenure.

No files have been added to this section.

Letter Used to Solicit External Evaluations Add

The Department Head will attach a copy of the letter used to solicit external evaluations on behalf of the faculty member. If a common template was utilized, it may be attached in lieu of copies of each individual letter. Documents should be uploaded to the External Evaluation folder.

No files have been added to this section.

External Letter Summary Sheet Add

The Department Head will upload the completed and final External Letter Summary Sheet to the External Evaluation folder.

No files have been added to this section.

Forms

| Form Name | Assignee | Actions |
|--|--------------------|------------------------------------|
| Dept Head and Dean Recommendation 3 required questions | Committee Managers | Manage Respondents |
| Dept Head and Dean Recommendation 3 required questions | Test Head (You) | Fill Out Form |

6. Browse to Upload a new file.

Add Department Head Recommendation ✕

Upload a new file Select file from case



Drag & Drop your files anywhere or

Browse To Upload

+ Add

Cancel

7. Rename the document, as needed. Ensure that the document Section is the appropriate committee folder. In this instance, the Department Head Recommendation section.

8. Select **Add**.

The Required Items section will reflect that the requirement is Complete.

Add Department Head Recommendation ✕

Upload a new file Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

| | |
|---|--|
| Name * TEST_DH Eval_Husky, Jonathan | Section * Department Head Recommendation |
|---|--|

Rename the document, as needed, to something easily recognizable.

Ensure the document will be added to the appropriate internal case section.

Add Cancel

Required Items 3 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Department Head Recommendation Complete

Upload an evaluation letter summarizing the perspective of the departmental PTR committee, the joint appointment supervisor (if applicable), and the department head's independent evaluation of the faculty member's case for promotion and tenure.

9. Repeat steps 5-8 for all remaining requirements.

Please note that the letter used to solicit external evaluations and the external letter summary sheet should be saved in the External Evaluations section, not the Department Head Recommendation section.

Add External Letter Summary Sheet ✕

[Upload a new file](#) [Select file from case](#)

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

Name *

TEST_External Eval Summary Sheet_Husky, Jonat

Section *

External Evaluations ▼

The Required Items section will reflect that each requirement is Complete.

Required Items 1 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Department Head Recommendation Complete

Upload an evaluation letter summarizing the perspective of the departmental PTR committee, the joint appointment supervisor (if applicable), and the department head's independent evaluation of the faculty member's case for promotion and tenure.

Name
TEST_DH Eval_Husky, Jonathan ✎

Letter Used to Solicit External Evaluations Complete

The Department Head will attach a copy of the letter used to solicit external evaluations on behalf of the faculty member. If a common template was utilized, it may be attached in lieu of copies of each individual letter. Documents should be uploaded to the External Evaluation folder.

Name
TEST_DH External Eval Solicit Letter_Husky, Jonathan ✎

External Letter Summary Sheet Complete

The Department Head will upload the completed and final External Letter Summary Sheet to the External Evaluation folder.

Name
TEST_External Eval Summary Sheet_Husky, Jonathan ✎

Completing Recommendation Forms

Only the Committee Manager (department head or dean) can complete required forms.

10. Scroll to the *Required Items* section and review committee requirements.

In addition to uploading the Department Head Recommendation, Letter Used to Solicit External Evaluations, and External Letter Summary Sheet, the Committee Manager must complete the Dept Head and Dean Recommendation form.

11. Select **Fill Out Form** next to the Dept Head and Dean Recommendation Form.

The form should only be filled out once, by the Committee Manager.

Forms

| Form Name | Assignee | Actions |
|--|--------------------|------------------------------------|
| Dept Head and Dean Recommendation 3 required questions | Committee Managers | Manage Respondents |
| Dept Head and Dean Recommendation 3 required questions | Test Head (You) | Fill Out Form |

Dept Head and Dean Recommendation

The Department Head and Dean will utilize this form to indicate if they support or do not support the faculty member's case for promotion and tenure.

Department Head or Dean Name *

Indicate your first and last name.

Title *

Department Head

Dean

I support/do not support the faculty member's case: *

Support

Do not support

Submit Form

Save Responses

[Return to Case](#)

12. Complete the form by entering your name, title, and indicate whether you Support or Do Not Support the faculty member's case.

13. **Submit form.**

↑
Submits form and satisfies committee requirement.

↑
Saves progress on form to complete later. Does not submit requirement.

14. When the form is submitted, select **Yes** to confirm your submission.

Confirm



Submitting the form "Dept Head and Dean Recommendation" will make your responses available to the appropriate members for review. You will be able to change or edit your responses while the case is at the current step.

Yes

No

15. To edit a form while the case is at the current step, select **Edit Submission**, make necessary changes to your responses, and re-submit form.

| Forms | | |
|--|--------------------|------------------------------------|
| Form Name | Assignee | Actions |
| Dept Head and Dean Recommendation 3 required questions | Committee Managers | Manage Respondents |
| Dept Head and Dean Recommendation 3 required questions | Test Head (You) | Edit Submission |

Sending a Case Forward

Interfolio Job Aid: Move a Case Forward

When all Committee Required Items have been satisfied, the Committee Manager or Administrator can move the case forward to the next stage of review.

15. From the Case Summary Page, select **Send Case** from the top righthand options.

Jonathan Husky Send Case ▾ Case Options ▾

Unit
Animal Science

Template
SCHOOL_DEPT_Promotion and Tenure

Status
[Select Status](#)

[Case Materials](#) [Case Details](#)

Reviewing as
Department Head

16. Select **Forward to**.

Send Case ▾

- Forward to**
Dean's PTR Advisory Council Review
- Backwards to**
Departmental Promotion, Tenure, and Reappointment Advisory Committee Review

16. A list of all committees and reviewers gaining access to the next step will display, along with the option to enter a message to the reviewers gaining access to the case.

Deselect the checkbox next to “Send a message to the reviewers gaining access” if you do not wish to send a message. Regardless of whether a message is sent or not, when a committee member gains access to a case, a task for that case will display on their homepage.

17. Select **Continue**.

Send Case Forward ✕

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

Department Head | 1 members

The following reviewers will gain access to the case:

Dean's PTR Advisory Council | 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 *

Husky, Jonathan - PTR Case

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.

Best,
Test Head

18. You'll see a green popup box in the lefthand corner of your screen confirming that the case as been sent forward.

All reviewers who do not have access to the next level of review will lose access to the case.

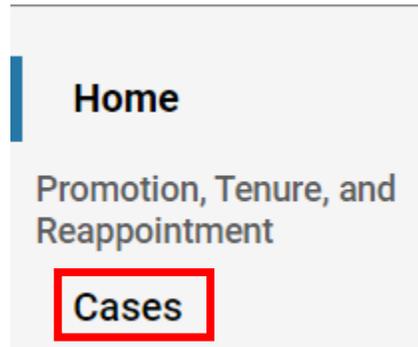


Sending Multiple Cases Forward in Bulk

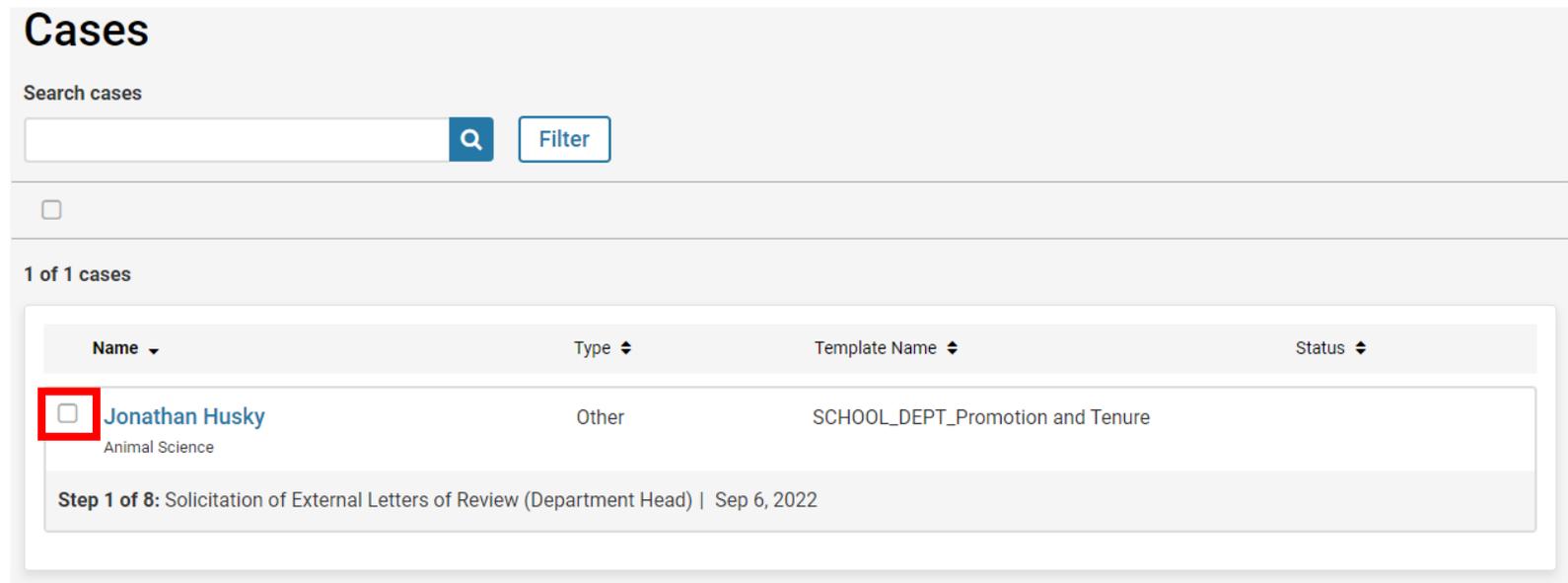
Interfolio Job Aid: Move a Case Forward

Committee Managers or Administrators can move multiple cases forward in bulk from the Case List.

1. From the Interfolio homepage select **Cases** under the Promotion, Tenure, and Reappointment lefthand navigation bar.



2. Select the cases from the Case List by clicking the checkbox next to each.



3. Click **Send Forward** at the top of the case list to move selected cases forward.

Cases

Search cases

1 of 1 cases

| Name ▾ | Type ▾ |
|--|--------|
| <input checked="" type="checkbox"/> Jonathan Husky Animal Science | Other |
| Step 2 of 8: Departmental Promotion, Tenure, and Reappointment Advisory Committee | |

4. A list of all committees and reviewers gaining access to the next step will display, along with the option to enter a message to the reviewers gaining access to the case.

Deselect the checkbox next to “Send a message to the reviewers gaining access” if you do not wish to send a message. Regardless of whether a message is sent or not, when a committee member gains access to a case, a task for that case will display on their homepage.

5. Select **Continue**.

Send Case Forward ✕

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

Departmental Promotion, Tenure, and Reappointment Advisory Committee | 1 members

The following reviewers will gain access to the case:

Department Head | 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 *

Husky, Jonathan PTR Case

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.

Best,
Test HeadComm

6. You'll see a green popup box in the lefthand corner of your screen confirming that the case as been sent forward.

All reviewers who do not have access to the next level of review will lose access to the case.

