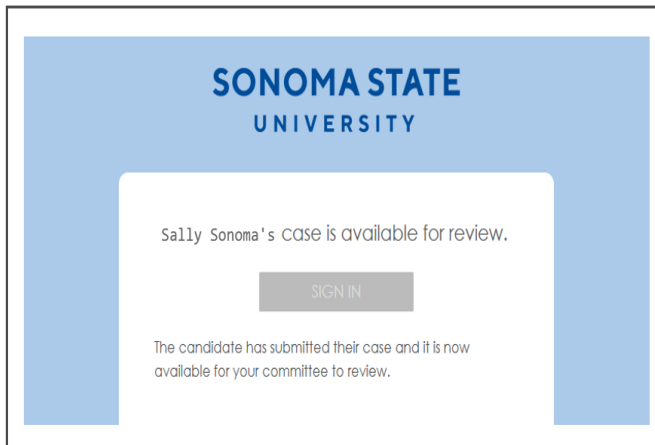


RTP Reviewer Step-by-Step Interfolio Guide

As a Reviewer you will receive an email notifying you that a case is available for your review.

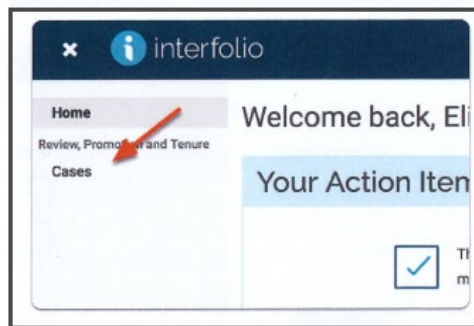
Click on the “Sign In” button in the email to view the case, or go to Interfolio.com to sign in through the Partner Institution button where you will have access to all your assigned cases.



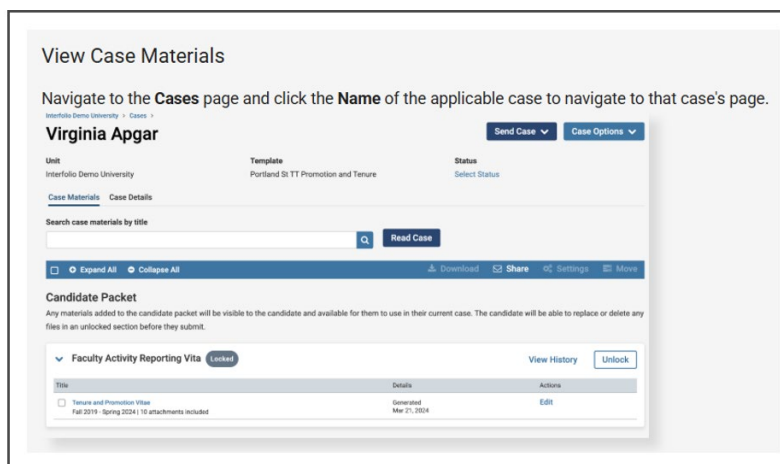
OR

The Interfolio Sign In page. It has a "Sign In" heading. Under "Sign in with email", there are fields for "Email *" and "Password *", followed by a "Sign In" button. To the right, under "Other Sign In Options", there is a "Sign in with Partner Institution" button (highlighted with a red arrow) and a "Sign in with Google" button. Below the sign-in options, there are links for "Forgot your password?" and "Don't have an account?" with a "Create an account" link.

Navigate to the materials for the candidate by clicking on the “cases” tab on the left.



Then click on the name of the candidate you would like to review.



Case Materials

The Case Materials tab is divided into two main parts that can each contain one or more sections; the Candidate Packet and the Internal Sections.

The screenshot shows the 'Case Materials' interface. At the top, there are tabs for 'Case Materials' and 'Case Details'. Below the tabs is a search bar with the text 'Search case materials by title' and a 'Read Case' button. A toolbar contains icons for 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move'. The main section is titled 'Candidate Packet' and contains a description: '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.' Below this, there are two sections: 'Faculty180 Vita' (Unlocked) and 'Candidate Documents' (Unlocked). Each section has a 'View History' button and a 'Lock' button. At the bottom, there is a bullet point: '• Read Case to load all accessible case materials, or click the Title of a document to open it in the document reader for online viewing.'

Candidate Packet

Includes sections where the candidate or others can add materials, along with required forms. Candidates can replace or delete files in unlocked sections before submitting for review. These materials are visible to the candidate and usable in their current case.

The screenshot shows the 'Candidate Packet' interface. It has a title bar with a plus icon. Below the title bar is a description: 'Includes sections where the candidate or others can add materials, along with required forms. Candidates can replace or delete files in unlocked sections before submitting for review. These materials are visible to the candidate and usable in their current case.' Below this, there is a section titled 'Candidate Packet' with a description: '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.' Below this, there are three sections: 'Faculty Activity Reporting Vita' (Locked), 'Candidate Documents' (Locked), and 'Optional materials' (Locked). Each section has a 'View History' button and an 'Unlock' button.

Here is an example of a Candidate's packet (WPAF) for SSU.

The screenshot shows a web interface for a case named "Scott Graves" at Sonoma State University. The page has a header with "Send Case" and "Case Options" buttons. Below the header, there are tabs for "Case Materials" and "Case Details". A search bar is present with a "Read Case" button. The main section is titled "Candidate Packet" and includes a note about visibility to the candidate. It lists several sections: "Curriculum Vitae" (Unlocked), "Department RTP Criteria" (Unlocked), "Self-Assessment" (Locked), "Peer Observations" (Unlocked), and "Reflections on Student Experience (ROSE) Summary Table" (Unlocked). Each section has a "Lock" or "Unlock" button. The "Curriculum Vitae" section is expanded, showing a table with one entry: "Graves, Scott, CV, 2025", added by Nicole Hilger on Sep 3, 2025, with an "Add File" button and an "Edit" link.

Title	Details	Actions
Graves, Scott, CV, 2025	Added by Nicole Hilger Sep 3, 2025	Edit

Below the candidate's WPAF is the internal section.

Note: this is where Committee Chairs will upload their Recommendation letter when the process is complete by clicking on "Add File." RTP Committee Chairs can also upload the department chair recommendations here, if any.

The screenshot shows the "Internal Sections" page, which is accessible to committee members. It includes a warning message: "You are asked to submit required items as part of this case." Below this, there are seven sections, each with an "Edit" and "Add File" button: "Previous RTP Decisions", "Previous Student Evaluations", "Department RTP Letter of Recommendation", "Optional Department Chair Recommendation", "College RTP Letter of Recommendation", "Dean Letter of Recommendation", and "University RTP Letter of Recommendation".

Before you review the case, please complete the required Confidentiality Agreement. That is found under the “Case Details” tab. Please note that the case will not be able to be moved forward until all committee members have completed the Confidentiality Agreement.

Sonoma State University > Cases >

Scott Graves

Unit: Sonoma State University

Template: 2 PY Performance Review

Status: 2PY Retention change

Case Materials: **Case Details**

Reviewing as: RTP Dept. Test Committee

Instructions

The Department RTP Committee Chair may upload the committee's RTP recommendation letter in this section. In addition, the Committee Chair must fill out the Recommendation form here. Once these two actions have been completed, the Chair will be able to press the "Send" icon so that the RTP file (Case) moves forward to the next step.

Required Items 2 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 RTP Letter of Recommendation Complete

Name: Department RTP Letter of Recommendation

Forms

Form Name	Assignee	Actions
Recommendation Form Retention 1 required questions	Committee Members	Manage Responses
Recommendation Form Retention 1 required questions	Evan MacKay (You)	Fill Out Form
RTP Committee Member Confidentiality Agreement 1 required questions	Committee Members	Manage Responses
RTP Committee Member Confidentiality Agreement 1 required questions	Evan MacKay (You)	Fill Out Form

To complete the Confidentiality Agreement, click on the radio button and then “submit.”

RTP Committee Member Confidentiality Agreement

Form required of all faculty reviewers (Department RTP, College RTP, University RTP), ensuring understanding of confidentiality and security of materials accessed through Interfolio. Recommended by FSAC as a response to URTPs request for reviewers to be able to download materials.

Assurance of confidentiality and security of RTP candidate's WPAF documents included in this case *

☒ I understand that all materials viewed in this WPAF are confidential and not to be shared with others. If I opt to download any element of the WPAF, I agree to delete it as soon as possible.

☐ I do not understand that all materials viewed in this WPAF are confidential and not to be shared with others. If I opt to download any element of the WPAF, I agree to delete it as soon as possible.

Submit Form **Save Responses** **Return to Case**

In the same Case Details tab, Committee Chairs will also complete the Recommendation form after the Committee completes its work.

Recommendation Form Retention

This form is used by RTP Reviewers to record their recommendation for candidates up for Retention.

Recommendation for RTP Candidate *

Please select the appropriate recommendation for: Retention or Termination.

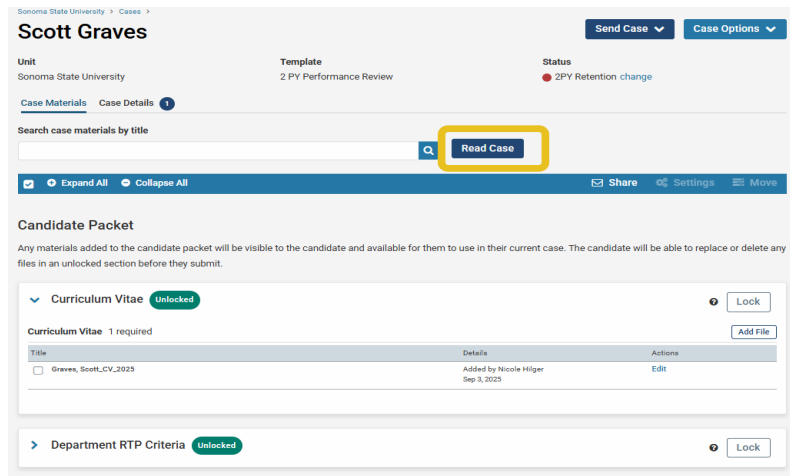
☒ Retention

☐ Termination

Last saved on Sep 4, 2025 at 3:53 PM EDT

Submit Form **Return to Case**

To view the full file, click Read Case on the Case Materials tab. This will open up the document reader where you will see the entire file with an index on the left.



As a Reviewer, you may add notes per the instructions below -

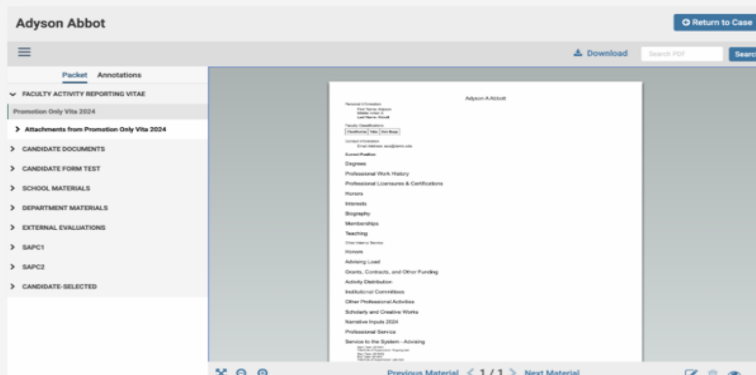
Add Annotations Using the Document Reader in FS and RPT

Users in Faculty Search (FS) and Review, Promotion & Tenure (RPT) can read and annotate candidate application materials directly within the built-in document reader which can be accessed from an [applicant's profile in FS](#) or when [viewing case materials in RPT](#). The reader simplifies the review process by allowing users to highlight important parts of a packet and easily revisit their notes when evaluating materials. It also enables viewing and assessing multiple applicants' materials without the need to download files. Within the document reader, evaluators can highlight text, add annotations, and download materials. FS users have the added ability for to [leave comments](#), [apply tags to documents](#), and [assign ratings](#) directly from within the document reader.

Annotations are private notes and are only visible to the reviewer who adds them. However, much like paper notes, annotations may be discoverable as evidence in certain legal proceedings.

Add & Export Annotations

1. Annotations are added from the lower right-hand corner of the reader.



2. Click the **Note** (pencil with square) icon to add an annotation on the selected document.

You have the following annotation options:

- Make **no selection** to add a simple sticky note to the document.
- Click **Point** to add a note with an arrow pointing to a particular point in the document.
- Click **Area** to add a note on a selected area.
- Click **Text** to add a note about the highlighted text.
- To edit an existing note, simply click into the text field.

Text in the document reader cannot be highlighted or copied. To copy specific text from a document, users must download the file first.

- Notes can be left on materials during the review process. The annotations made will appear on their own tab and can be exported.

Instructions for downloading materials –

Note: Please download only when necessary and be sure to delete downloaded materials as soon as possible. These are confidential documents.

Download Materials

- Navigate to the [Case's page](#) and select the desired materials to download using the checkboxes. Then click the **Download** button that appears on the toolbar.

The screenshot shows the 'Download Materials' interface for Case 'Adyson Abbot'. The left sidebar contains navigation links: Employees, Administration, Reports, Users & Groups, Review, Promotion & Tenure, Cases, Templates, Administration, Reports, Users & Groups, Lifecycle Management, Series, Faculties, Administration, Message Logs, and Reports. The main content area shows 'Case Materials' with a search bar and a 'Read Case' button. Below the search bar is a table of materials. The first material is 'Faculty Activity Reporting Vita' with a status of 'Unlocked'. Below it is a table with columns 'Title', 'Details', and 'Actions'. The first row in this table is 'Promotion Only Vita 2024 Spring 2018 - Fall 2023' with a 'Generated' date of 'Apr 21, 2025' and an 'Edit' action. A 'Download' button is visible in the toolbar above the table.

- You can also click **Read Case** to download materials in the document reader. From the document reader, you can download individual documents or the entire packet.

The screenshot shows the document reader interface for Case 'Adyson Abbot'. The left sidebar contains navigation links: Packet, Annotations, FACULTY ACTIVITY REPORTING VITAE, Promotion Only Vita 2024, Attachments from Promotion Only Vita 2024, CANDIDATE DOCUMENTS, CANDIDATE FORM TEST, SCHOOL MATERIALS, DEPARTMENT MATERIALS, EXTERNAL EVALUATIONS, SAPC1, SAPC2, and CANDIDATE-SELECTED. The main content area shows a list of materials with a 'Download' button. A dropdown menu is open, showing options to 'Download Packet' or 'Download Document'. The document viewer shows a list of materials with a 'Previous Material' button and a 'Next Material' button. The document viewer also shows a 'Return to Case' button.

2. If you choose to download the entire packet, a window will appear for you to select which materials to include in the download.

Download Packet

Select All

Faculty Activity Reporting Vita

☐ Promotion Only Vita 2024

Candidate Documents

☐ Review Promotion Tenure VPAT 2023-07

☐ Training Test

☐ Section unlocked current

Candidate Form Test

☐ External Evaluator Form

School Materials

☐ Updated Document

Department Materials

☐ Reference Letter 1

Download ZIP Download PDF Cancel

For security reasons, downloads are not direct. Instead, users can access downloaded case materials anytime from their Tasks. The ability to download materials can be restricted at the institutional level or disabled entirely for all users.

3. Navigate back to the home page and click **Your Files Are Ready to Download** under 'My Tasks.'

My Tasks

Search

29
Unread Tasks

7
Read Tasks

Title	Due Date
Your Files Are Ready to Download	

4. The **Requested Downloads** page will display. Click **Download** under the 'Action' column to view the downloaded materials.

Requested Downloads

Below is a list of materials you've requested to download. Please note that if you've requested to download a set of documents, materials might have been added to the set since you last requested the download. Please check back to make sure you have all of the relevant documents.

Name	Date Requested	Action
Your download of documents materials for Adyson Abbot's case is ready. PM Demo University Promotion Promotion Only	June 11, 2025	Download Remove
Your download of documents materials for Adyson Abbot's case is ready. PM Demo University Promotion Promotion Only	June 11, 2025	Download Remove

When all committee members have completed confidentiality agreements and when the chair has completed the recommendation form and uploaded the committee recommendation letter, click on “send case” in the upper right-hand corner to complete your review and move the case to the next step in the process.

Send Case ▼

Case Options ▼

Forward to
Faculty Affairs Checkpoint after
Department RTP Review

Questions? Please email RTP@sonoma.edu.