



College of Arts and Sciences  
**Interfolio Workshop for  
Case Managers**



# Welcome and Introductions

Kristi Williams



# The Purpose of this Workshop

- For: Dept. Staff supporting P&T reviews
- What: Overview of Interfolio for P&T Staff
- Why: To help familiarize staff with Interfolio and facilitate preparation of P&T dossiers for faculty candidates
  - Chat function is available for questions

# Common Initials and Terms

- **P&T** Promotion and Tenure
- **TIU** Tenure Initiating Unit (department or school)
- **TIU Head** Chair or Director
- **Chair Pro Tem** Temp. TIU Head
- **CEF** Committee of Eligible Faculty
- **College Panels** College divisional committees of senior faculty
- **P&T Chair** Chair of CEF
- **POD** Procedures Oversight Designee
- **APT** Appointments, Promotion and Tenure Doc.
- **POA** Pattern of Administration Doc.
- **SEI** Student Evaluations of Instruction
- **OAA** Office of Academic Affairs



# Agenda

- Case Managers
- Interfolio RPT Overview and Walkthrough
- Interfolio FAR
- Resources
- Q&A



# Case Managers

Elizabeth Murphy



# Case Manager Role

- Typically, the administrative staff member who supports P&T in your unit
- Has access to the case from creation of case to submission to College



# Case Manager Responsibilities

- Add POD, P&T Chair, TIU Head, and Regional Campus administrators to each Committee in the Case Review Steps
- Upload files to Internal Sections
- Unlock Candidate Packet sections as needed
- Move the case forward or backward through the Case Review Steps
- Upload or move files to fulfill Case Review Step requirements as needed

# Interfolio RPT Overview and Walkthrough

Toni Calbert and Kyle Williams



# Interfolio Modules

## Review, Promotion & Tenure (RPT)

- Released August 2023
- Promotion/Promotion and Tenure Reviews
- 4<sup>th</sup> year Reviews
- Reappointment Reviews
- Required for all faculty

## Faculty Activity Reporting (FAR)

- Released July 2024
- Direct entry of research, teaching, and service activities
- NOT required for 2025-2026
  - May be used at candidate/ TIU discretion



# RPT Terms and Roles

<b>Case</b>	Candidate's Interfolio review file including all required documentation
<b>Case Manager</b>	TIU administrative staff member who supports the review process; has access to all parts of case from creation to submission to college
<b>Committee/ Committee Members</b>	Groups of users that review the candidates' case at various steps of the review process
<b>Committee Manager</b>	Individual on committee with additional access and responsibilities during a given review step. Can upload materials, complete required forms and move case forward and back.
<b>Administrator</b>	Individuals with most access to cases in their unit; TIU Heads for all cases in their unit; Divisional Deans, Faculty Affairs, College Dean for the college



# RPT Workflow

## 1. Template (OAA)

## 2. Case (College)

### a. Candidate Packet (Candidate)

### b. Internal Sections (Case Manager)

### c. Case Review Steps (Various)

- TIU Review: POD, Regional Campus, CEF, TIU Head
- College Review: Faculty Affairs, College Panels, College Dean
- University Review: OAA and University Committees

# Log in to Interfolio

<https://go.osu.edu/interfolio>

- Enter OSU name.# and password
- "Where do you want to go?"
- Select Ohio State logo, NOT the Interfolio dossier logo

Google "Interfolio"

- Select Login > Sign in with Partner Institution
- Enter Ohio State University

# Case Homepage Overview

- Send Case and Case Options Buttons
- Two Tabs: Case Materials and Case Details
  - Case Materials – default page
    - Candidate Packet
    - Internal Sections
    - Read Case view
  - Case Details – corresponds to the Case Review Step

# Candidate Packet

Candidate is responsible for uploading required files and completing forms

- Introduction and Core Dossier
- SEI Reports
- Student Evaluation of Teaching Checklist
- Promotion Dossier Checklist



# Candidate Packet

- When Candidate “Submits” this locks the section and moves the case forward to the POD Review 1 step
- Case Managers can lock and unlock candidate packet sections if needed
- Case Managers can upload files to these sections, however, anything the candidate uploads, only the candidate can delete



# Internal Sections

Case Managers upload files to the Internal Sections.

- Annual Reviews (including Fourth Year Review Letters for Assistant Professors)
- Peer Evaluations
- External Evaluations (including forms 114 and 106)\*
- SEI Comment Summaries

Files can be uploaded as soon as the case is available.

# Internal Sections – File Naming

For sections with multiple documents, we recommend uploading as individual files with a file name that clearly indicates the candidate's name, type of file, and year/semester. For example:

## Annual Reviews

Smith Annual Review 2021  
Smith Annual Review 2022  
Smith 4<sup>th</sup> Year Review (CEF)  
2023

## Peer Evaluations

Smith Peer Eval AU22 (Meyers)  
Smith Peer Eval SP23 (Cane)  
Smith Peer Eval SP24 (Johnson)

## External Evaluations

Smith External Eval (Evans)  
Smith External Eval (Dalton)  
Smith External Eval (Kirk)

Files names should be concise, consistent, and specific enough that documents are easy to identify.

# Internal Sections - Functions

- Click “Add File” to upload files
- Drag and drop to re-order files
- Click “Edit” next to a specific file
  - Select “Delete” to delete files
  - Select “Edit Settings” to rename or move files to different section

# Case Review Steps

- Case Managers main responsibility will be adding committee members and designating committee managers to the Case Review Steps.
- Other responsibilities may include:
  - Moving the case forward or backward
  - Uploading or moving files to “Case Details”
  - Assisting with completing or editing forms



# Case Review Steps (TIU)

Step 0. Case is with candidate

## Columbus Campus

1. POD Review 1
2. CEF Review
3. POD Review 2
4. TIU Head Review
5. TIU Candidate  
Comments

## Regional Campus

1. POD Review 1
2. Regional Campus Faculty Deliberative Body
3. Regional Campus Vote
4. Regional Campus Dean/Director
5. Regional Campus Candidate Comments
6. Faculty Affairs Review
7. CEF Review
8. POD Review 2
9. TIU Head Review
10. TIU Candidate Comments



# Case Review Steps – Committees

- Each step requires a document to be uploaded and/or a form to be completed before moving the case forward
- Each step must be populated by committee members and one person designated as committee manager
- The committee manager completes the step requirements:
  - POD Review steps – POD
  - CEF Review step – P&T Chair
  - TIU Head Review step – TIU Head
  - TIU Candidate Comments – Case Manager
  - Regional Faculty Deliberative Body/Vote/Comments step – Regional Faculty Chair
  - Regional Dean Review step – Regional Dean

# Case Review Steps – Committees

- Committee members can be added in two ways:
  - All steps on the same page through the “Case Options” button (select “Edit Case” > “Case Review Steps”) [Recommended]
  - Individually by step on the “Case Details” page
- Add the POD, P&T Chair, and TIU Head to every committee
- Only designate one person as committee manager

# Case Review Steps – Adding Committee Members through “Case Options”

- Click the “Case Options” button (top right of candidate’s case)
- Select “Edit Case” > Select “Case Review Steps”
- For each of the TIU steps (POD Reviews, Regional Campus steps, CEF Review, TIU Head Review, Candidate Comments)
  - Click “Edit”
  - Click “Add Members” and enter the names of the POD, P&T Chair, and TIU Head in the search bar > “Close”
  - Click the “star” icon next to the designated Committee Manager
  - Click “Return to Case Review Steps”

# Case Review Steps – Adding Committee Members through “Case Details”

- Click the “Case Details” button (left side of candidate’s case, above search bar)
- Scroll down to “Committee Members” section
- Click “Edit” > “Add Member” and enter the names of the POD, P&T Chair, and TIU Head in the search bar > Click “Add”
- Click “Edit” again and check the “Manager” box next to the designated Committee Manager
- Repeat at each Case Review Step



# Case Review Steps – Moving the Case Forward/Backward

- To move the case, the requirements for the step must be completed
- Cases can only be moved one step at a time
- Click the “Send Case” button (top right corner) > Select the desired step either moving forward or backward
  - If committee members have been added to Case Review Steps through the “Case Options” button > Enter a subject and edit the message if needed
  - If committee members have not yet been added, unclick the “Send a message” box
- Click “Continue” to send the message and move the case

# Case Review Steps – Uploading and Moving Files to “Case Details”

- Either the Case Manager or Committee Manager can upload files to the “Case Details” page
- Click into the “Case Details” page
- Scroll down to the “Required Items” section
- Click “Add” > default page is “Upload a new file”
  - If the file has not been added to “Internal Sections” > “Browse To Upload” and select the relevant file
  - If the file has been added to “Internal Sections” > click “Select file from case” page > select the relevant file
- Click “Add”

# Case Review Steps – Completing and Editing Forms

- At most steps, the Committee Manager (e.g., POD, TIU Head) will need to complete a form
- This can only be done on the “Case Details” page
- The Committee Manager scrolls down to the “Required Items” section
  - Only the Committee Manager will see the “Fill Out Form” option
- Case Managers can check the status of forms by selecting “Manage Respondents”
- The Committee Manager can edit the form by returning to “Case Details” and scrolling to the “Required Items” section to see the “Edit Submission” option



# Case Review Steps – Candidate Comments

- New steps added this year for Regional Campus and TIU Candidate Comments
- Case Manager may designate yourself or another person as the Committee Manager
- The Committee Manager uploads the candidate's comments (or statement that they have not comments) at this step
- If there are comments, any response from the Regional Campus, CEF, or TIU Head should also be uploaded to this section
- Candidate Comments will be the last step before submission to the college

# P&T College Submission Dates

- Units with Columbus Candidates Only: **October 20th**
- Units with Regional Campus Candidates: **October 27th**

## Send cases forward to the Faculty Affairs Review step

- ASC Faculty Affairs reviews dossiers before releasing them to panels and will communicate and needed revisions to candidates, P&T Chairs, PODs, and Case Managers

# Interfolio RPT FAQs and Troubleshooting

Kyle Williams



# Frequently Asked Questions

- Do I need to add all members of the CEF to Interfolio?
  - No, we do not recommend adding all members of the CEF to Interfolio. Please share materials for them to review via Teams or OneDrive
- Does the candidate need to sign the Dossier checklist before the CEF meets (or POD with POD Review Form 1)?
  - No. The candidate should review their materials to make sure they are complete and accurate before the meeting, but we understand it may not be practical to complete all Interfolio steps in tandem with the review process in real time. There is no expectation of doing so at this time.
- I have a regional campus candidate. Who should be added to the regional campus steps?
  - The chair of the regional campus faculty deliberative body and regional campus dean and director should be added to each of these steps, as well as any regional campus staff member supporting the process.
  - Also add the POD, P&T Chair, and TIU Head to each regional campus step.
  - If you are unsure, please reach out to ASC Faculty Affairs. We'll assist you with identifying the appropriate contacts on each regional campus.

# Troubleshooting Common Issues

- The POD and/or P&T Chair cannot see a candidate's case:
  - Check which step the case is on. If still with the candidate, you may need to send the case forward to POD Review 1 or wait until candidate “submits” materials
  - Check that the POD/P&T Chair is on the committee for the current Case Review Step; if not, add them
- The case won't move forward:
  - Check that all requirements have been completed – files uploaded to the “Case Details” page and forms completed by the Committee Manager
  - Often files like the CEF or TIU Head Recommendation Letter are uploaded to “Internal Sections” – these need to be moved to “Case Details” not re-uploaded.



# Troubleshooting Common Issues

- POD does not see the form they need to submit:
  - Check that the POD is on the committee for the current step and designated as Committee Manager; if not add and designate them
  - If they are already designated, direct them to the “Case Details” page
- A faculty member needs to edit a previously completed form:
  - Move the case backward to the relevant step
  - Direct the faculty member to click into the “Case Details” page; from there they can scroll down and will see an option to “Edit Submission”
  - Forms cannot be edited through “Internal Sections”



# Faculty Activity Reporting (FAR)

Toni Calbert



# FAR Overview

- Replaces Vita system
- Faculty can directly enter teaching, research, and service activities
- Will be used to create annual activity reports for annual reviews and replace the core dossier for P&T reviews
  - NOT required for P&T 2025-2026
  - Expected to be required in 2026-2027
- Staff and student employees may be asked to enter faculty information



# FAR Users and Roles

- **Faculty** – tenure track, clinical/teaching/practice, and research faculty are automatically added as users in the system
- **Staff and student employees** – can be granted proxy/support access to enter activities on behalf of faculty
  - RPT access does not grant FAR access
  - Requests for staff or student accounts **MUST** come through ASC Faculty Affairs
- Faculty are responsible for information input into their account; Interfolio does not log entries, so it is not possible to track when or by whom information is added



# FAR Emulate User Function

- Log into Interfolio
- Go to “Faculty Activity Reporting” Menu
- Select Administration > Administration > Emulate User
- Select name of faculty member
- Make any edits or entries
- Select “Exit Emulation” when finished



# FAR Profile and Activities

- Profile: equivalent to P&T Introduction: personal info, biographical narrative, current and past appointments, degrees, etc.
  - Personal info, appointments pulled from Workday
  - If information is incorrect, likely a Workday issues – contact your unit’s HR Consultant
- Activities: equivalent to new Core Dossier outline
  - Courses are pulled from Registrar – cannot be edited in Interfolio
  - All other activities must be manually entered
- Vitas and Biosketches: generate a file similar to core dossier



# Resources

Elizabeth Murphy



# Resources

- [ASC Intranet – Promotion and Tenure](#)
- [OAA Interfolio page](#)
  - [Faculty Activity Report \(FAR\)](#)
  - [Review, Promotion & Tenure \(RPT\)](#)



# ASC Faculty Affairs Team



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**Thank you!**

