



College of Arts and Sciences

Interfolio Workshop for Case Managers



THE OHIO STATE UNIVERSITY
COLLEGE OF ARTS AND SCIENCES

August 11, 2026

Welcome and Introductions

Toni Calbert



The Purpose of this Workshop

- For: Dept. Staff supporting P&T and Annual reviews
 - What: Overview of Interfolio for Case Managers
 - Why: To help familiarize staff with Interfolio and facilitate preparation of Annual Reviews and 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
CEF/P&T Chair	Chair of CEF
POD	Procedures Oversight Designee
College Panels	College divisional committees of senior faculty
APT	Appointments, Promotion and Tenure document
POA	Pattern of Administration document
SEI/SSLE	Student Evaluations of Instruction / Survey of Student Learning Experience
OAA	Office of Academic Affairs

Agenda

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



Case Managers

Elizabeth Murphy



Case Manager Role

- Typically, the administrative staff member who supports P&T and Annual Reviews 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

Questions?



Interfolio RPT Overview and Walkthrough

Toni Calbert



Interfolio Modules

Review, Promotion & Tenure (RPT)

- Released August 2023
- Promotion/Promotion and Tenure Reviews
- 4th 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 2026-2027
 - May be used at candidate/ TIU discretion
- Case Managers will have emulation access to FAR for their units – ASC will hold a workshop for Case Managers in Spring



RPT Terms and Roles

Case	Candidate's Interfolio review file including all required documentation
Case Manager	TIU administrative staff member who supports the review process; has access to all parts of case from creation to submission to college
Committee/ Committee Members	Groups of users that review the candidates' case at various steps of the review process
Committee Manager	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.
Administrator	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



Questions?



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



P&T College Submission Dates

- Units with Columbus Candidates Only: **October 19th**
- Units with Regional Campus Candidates: **October 26th**

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

Questions?



Interfolio RPT FAQs and Troubleshooting

Toni Calbert



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”

5 Minute Break



Annual Reviews

Elizabeth Murphy



Annual Review Overview

- [OAA Annual Review Policy](#)
- Applies to all compensated faculty (tenure track, clinical/teaching/practice, research, and associated) employed during the calendar year
- 3 levels of review: TIU/Regional, College, University

Annual Review Process Overview – TIU Review

- Faculty member submits annual review materials via Interfolio RPT
- TIU Head drafts annual review letter (w/input from joint TIU heads)
- Annual review meetings occur – required for all probationary faculty
- Written annual review is finalized and uploaded to Interfolio RPT
- Comments process – 7 days
- Appeal to Dean process – 14 days

Annual Review Process Overview – Regional Campus Faculty

- Regional Dean drafts annual review letters (with input from TIU Head)
- Regional tenure track and C/T/P faculty
 - ASC creates cases
 - Reviewed by regional campus, TIU, and college
- Regional associated faculty
 - Regional case manager creates cases
 - Reviewed by regional campus only

Annual Review Process Overview – College/University Review

- College deans review cases and either approves or disapproves TIU ratings
- No comments period
- Appeal to Provost process – 14 days
- Provost reviews cases – Final determination on all ratings



Annual Reviews for 2026

- 2026 Annual reviews will be completed in Interfolio RPT.
- ASC Faculty Affairs will be reaching out to units TIU Heads and Center Directors to get an updated list of all faculty. This list will be used to create cases in Interfolio.

Case Manager Responsibilities

- Confirm faculty requiring annual review; submit any changes to ASC Faculty Affairs
- Create Interfolio standing committees for any unit reviewers
- Assist faculty with uploading annual review materials
- Manage comments and appeals notifications
- Upload TIU annual review letters, candidate comments
- Move cases forward/backward as needed



Interfolio Committees

- We will be creating unit level templates this year, which will allow us to add standing committees to all cases in a unit rather than case managers adding committee member to cases individually
- Standing committees should consist of all reviewers needed for unit cases. If you have different reviewers for different subsets of your unit then you can create multiple committees (i.e. full professors are involved in annual review of associate professor, etc.)
 - Case Managers will need to create these committees before the case is created and let us know which committee should be added to each faculty members case.
 - Case managers will still be able to add and/or remove committee members at an individual case level, if needed.



Creating Standing Committees

- In Interfolio RPT, click on “Users & Groups” page in the left-side menu
- Click the “Committees” tab and “Add Committee”
- Give the committee a name: include the review year, “AR,” unit, and if more than one, a brief description:
 - 2026 AR English – Full Professors
 - 2026 AR Math – PROCOMP
- Select your “Unit” and click “Save”
- Email ascfacultyaffairs@osu with name of committee and which faculty it should be linked to (all, assistant professors, CTP, etc.)



Editing Standing Committees

Any changes made to the standing committee from the Users & Groups page will impact ALL cases (past, present, future) created with that committee.

If changes are needed for individual faculty, they should be made in their individual case.



Questions?



Resources

Elizabeth Murphy



Resources

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



ASC Faculty Affairs Team



General Faculty Affairs Email Account:
ascfacultyaffairs@osu.edu

Kristi Williams

Associate Dean of Faculty Affairs
Professor of Sociology
williams.2339@osu.edu

Toni Calbert

Assistant Dean of Faculty Affairs
calbert.5@osu.edu

Elizabeth Murphy

Faculty Affairs Specialist
murphy.926@osu.edu

Destanie Scales

Faculty Affairs Specialist
scales.106@osu.edu



Questions?





Thank you!

