

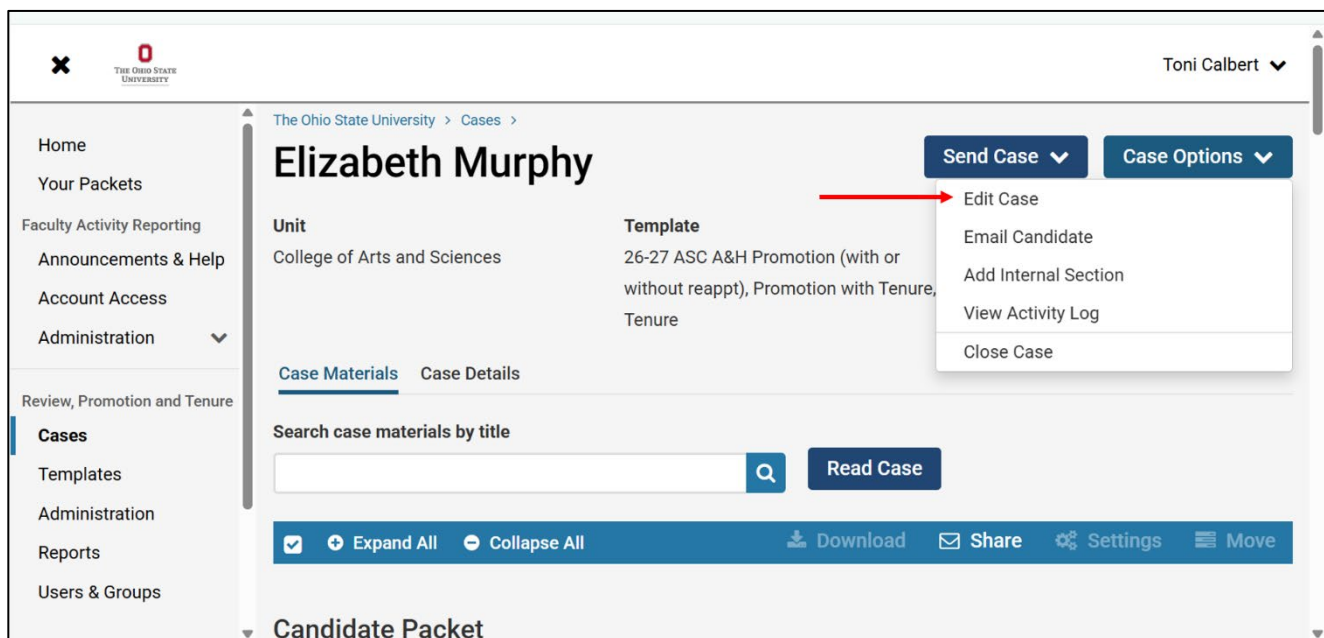
Quick Guide to Adding Committee Members in Interfolio RPT for Case Managers

This document is intended to assist Case Managers using Interfolio RPT with adding committee members to promotion, tenure, reappointment, or annual review cases.

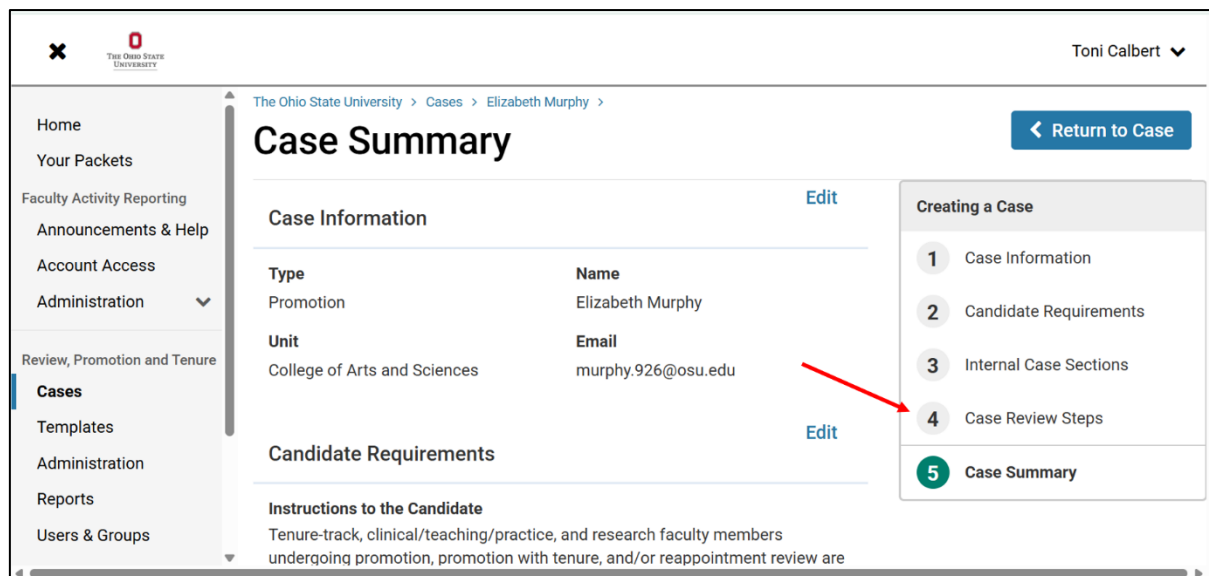
Accessing Interfolio RPT

- Log in to Interfolio: <https://go.osu.edu/interfolio>
 - Enter OSU name.# and password
 - At prompt: “Where to you want to go?” > Select OSU logo, NOT the Interfolio dossier logo
 - Interfolio will automatically take you to the OSU home page after first log in
- Navigate to the menu bar on the left side of the screen under “Review Promotion and Tenure” and click on “Cases.” This will take you to a list of faculty undergoing review in your unit.
- Click on the faculty member’s name to access their case.

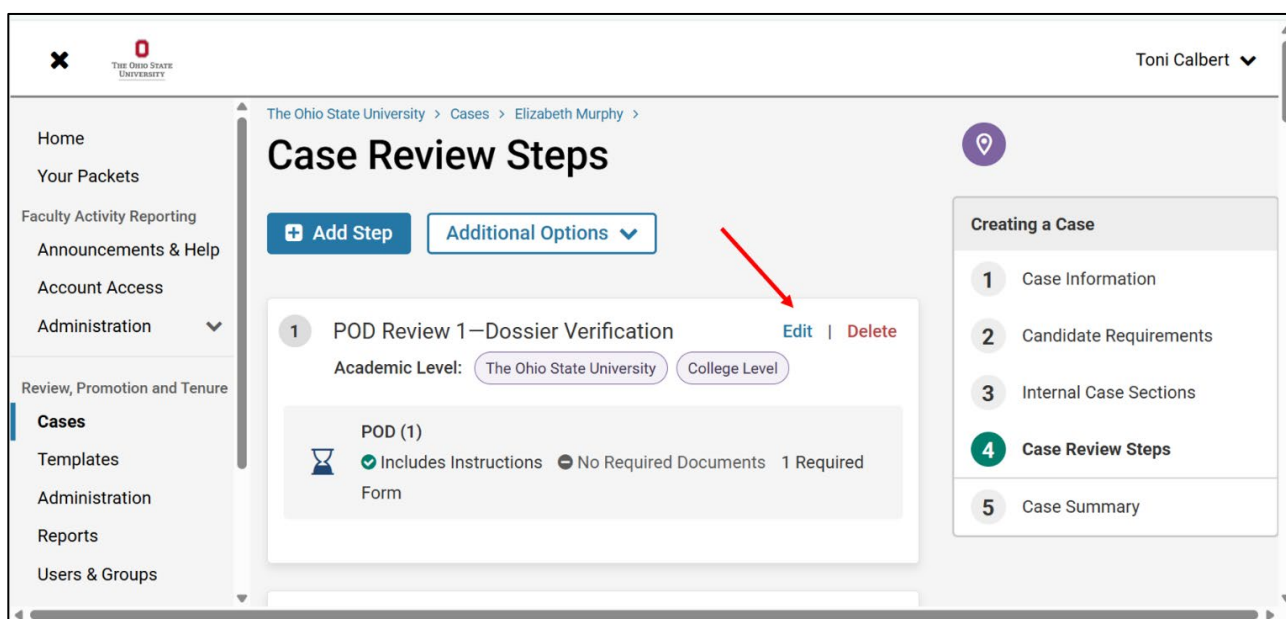
Click on “Case Options” in the top right corner. A drop-down menu will appear. Click on “Edit Case.”



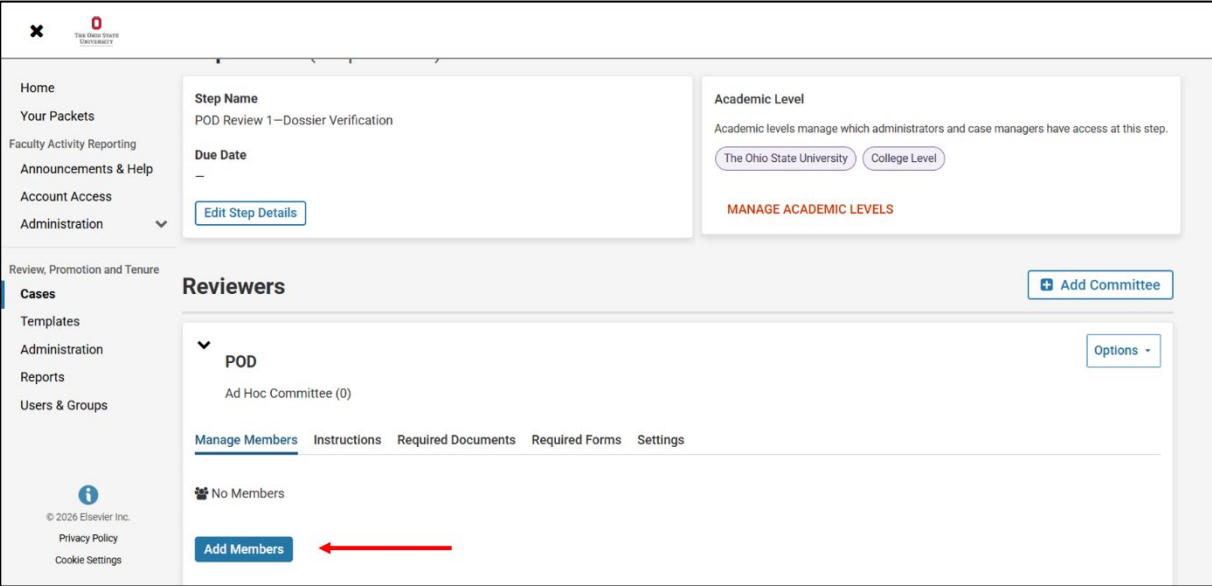
This takes you to the “Case Summary” page. Navigate to the “Creating a Case” menu on the right side of the screen. Click “Case Review Steps.”



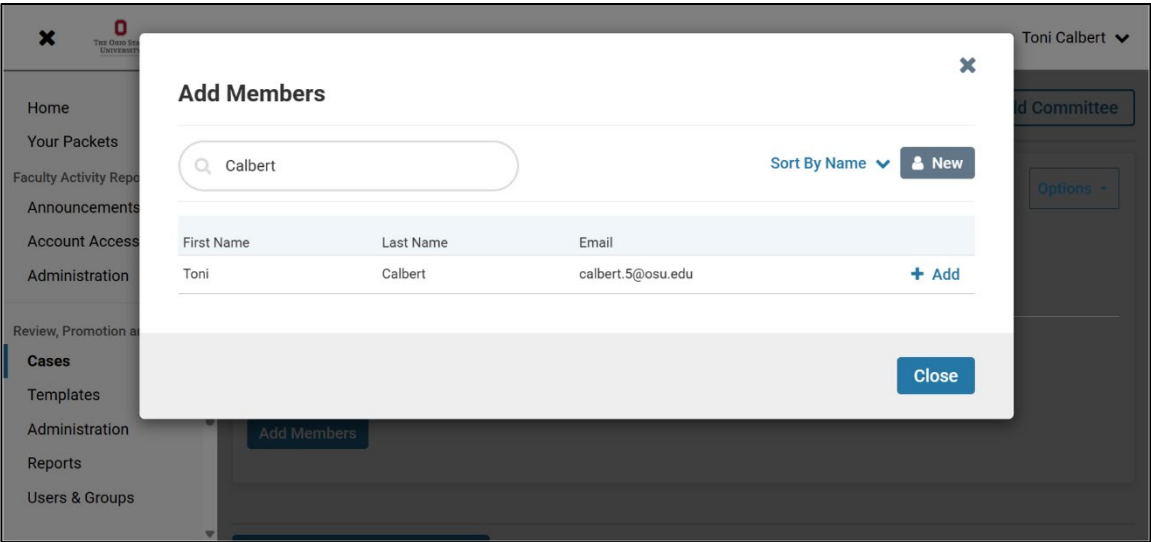
This takes you to the “Case Review Steps” page. You can access and edit all case review steps on this page (see full list of case review steps at the end of this document). To add committee members to a specific step, scroll to the desired step and click “Edit.”



In the edit page of the case review step, scroll down to the “Reviewers” box and click “Add Members” to add committee members.

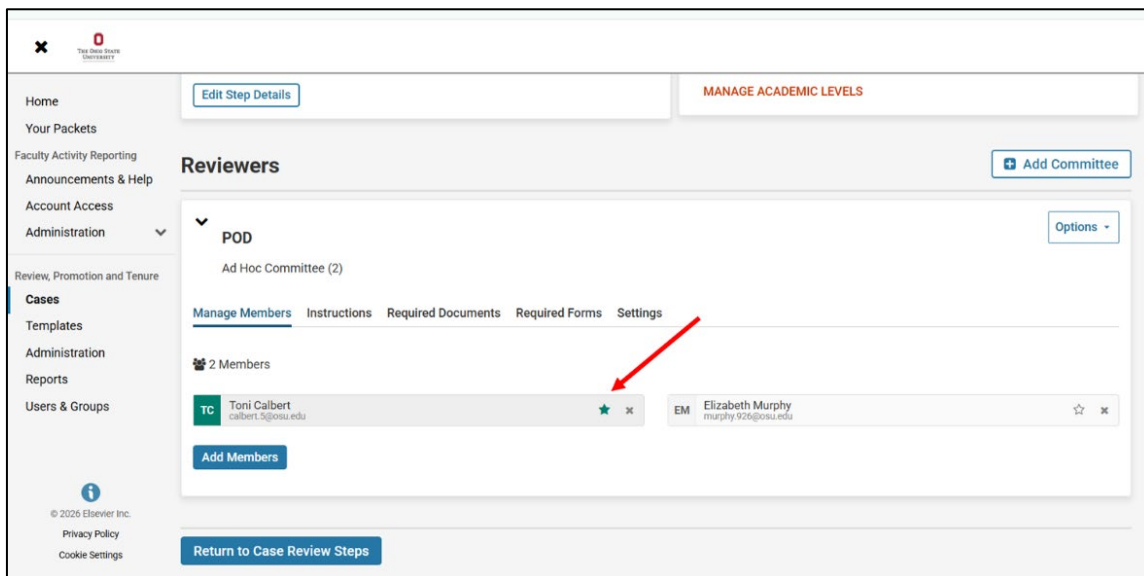


A search box will open. Search for the names of faculty to be added to the step (e.g. the POD or the CEF Chair). Click “+ Add” next to their name. Add any additional faculty needed and then click “Close.”



You should now see the names entered in the “Reviewers” box. Depending on the step, you will need to designate one person as the committee manager. This is the person expected to complete the requirements of the step (see case review step list below for recommended committee managers for each step). To designate a committee manager, click the star beside their name. It will turn green.

Only designate ONE person per step as the committee manager.



Click “Return to Case Review Steps” to go back to the Case Review Steps page. Scroll to the next step and repeat the process to add committee members to all TIU/Regional Campus steps.

Case Review Steps

Step	Committee Manager*	Action Required
POD Review 1	POD	Complete dossier verification form
CEF Review	P&T Chair or Case Manager	Upload CEF review letter
POD Review 2	POD	Complete deliberative body verification form; complete quorum, vote, vote percentage form
TIU Head Review	TIU Head	Upload TIU Head review letter and complete TIU Head recommendation form
Candidate Comments	Case Manager	Upload candidate comments

Regional Campus Steps

For regional candidates, these steps have been added between POD Review 1 and CEF Review.

Step	Committee Manager*	Action Required
Regional Campus Faculty Deliberative Body	Faculty Chair or Regional Campus Case Manager	Upload deliberative body review letter
Regional Campus Vote	Faculty Chair or Regional Campus Case Manager	Complete vote form
Regional Campus Dean/ Director Review	Regional Campus Dean/Director	Upload dean review letter and complete dean recommendation form
Regional Campus Candidate Comments	Regional Campus Case Manager	Upload candidate comments

*Designate only one person per step as the committee manager.