How to create a Promotion and/or Tenure "Case" In Interfolio RPT

Office of the Dean of Faculties
Texas A&M University
How to log into Interfolio

1. Go to Interfolio:  [http://account.interfolio.com](http://account.interfolio.com)

2. Click “Partner Institution” and search for Texas A&M University

3. Once you have selected Texas A&M University, click “Sign In”

4. You will be re-directed to sign in with your CAS credentials
How to create a “Case” in Interfolio RPT

- **Administrators** (department/college level Support Staff, Department Head, Dean) are the only individuals who can create a case!
- Once logged into Interfolio, the left side of the dashboard will have a list of Modules (Faculty 180; Faculty Search; Review, Promotion and Tenure) the **Administrator** has access to
- Under Review, Promotion and Tenure click on “Cases”
How to create a “Case” in Interfolio RPT

• Under “Create Case” you can create individual cases (one by one) by clicking on the main body of the button.

• Under “Create Case” you can “Create Multiple Cases” at once by clicking on the down arrow within the button.

• Multiple cases should be created at once when the P&T Committee members are going to be the same for all candidates in a group. E.g. all Promotion and Tenure candidates will have the same P&T Committee members which may be different for Promotion to Full Professor or APT promotions. If the Department has candidates in all three categories and 3 different committees, use create multiple cases with care, to ensure they follow the proper workflow.
How to create a “Case” in Interfolio RPT

• To start creating a case for a new Candidate type their last name in the “Search for a Candidate” box
• If the candidate is already in the list of Texas A&M University “Users” their name will appear
• Click on the “Candidate’s name”
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- If the candidate is NOT in the list of Texas A&M University “Users” in this example “XYZ” you will see the message below.
- Click on “Create User”
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• Click on “Add User”
How to create a “Case” in Interfolio RPT

• Enter the “User” information as in the screenshot below
• Click “Save”
• The new “User” will be created, and an email notification sent
How to create a “Case” in Interfolio RPT

- A popup message will indicate that the “User” has been added
- Click “Save”
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- The new “User” will receive a message like the one below
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- Once the candidate’s name is entered, under “Will the candidate be involved in the evaluation?” section select:
  - Yes, the candidate will be involved during the case (this requires the candidate to upload documents assigned to them)
  OR
  - No (this requires and “Administrator” to upload documents on behalf of the candidate)
- **IMPORTANT:** This setting cannot be changed after this step, unless you create a new “Case” for the candidate
How to create a “Case” in Interfolio RPT

• Under “Unit for Case” search for the department/college under which the candidate will be reviewed by typing the name of the department in the “Browse by Unit” search box. Please note that all departments have been mapped to their colleges and are listed under the search box.

• Select the “Department” by clicking on it (it will be highlighted in blue) and click “Confirm”.

[Images showing the steps of creating a case in Interfolio RPT]
How to create a “Case” in Interfolio RPT

- Next step is to select a “Template” from the list under “New Case”
- Please select “2021-2022 Promotion & Tenure”. IMPORTANT: The same template will be used for all actions being sought: Tenure and Promotion; Tenure only; Tenured, Promotion only; APT Promotion
- Do not select any other template!
How to create a “Case” in Interfolio RPT

• Once the “2021-2022 Promotion & Tenure” Template has been selected you will be taken to the next screen
• “Case Information”
  • Fields in this section are already populated
• IMPORTANT: Please do not change the field “Type” The Office of the Dean of Faculties has selected “Promotion as a default for all cases, regardless of type (APT promotion; tenure only; Tenured, promotion only; Tenure and Promotion)
How to create a “Case” in Interfolio RPT

• Under “Case Data Forms” you will see “Candidate Information Form”, click on “Answer”
How to create a “Case” in Interfolio RPT

- Fill out all the fields in the form and click “Save”
How to create a “Case” in Interfolio RPT

- After the “Case Data Form” has been submitted, a green check mark will appear to the left of “Candidate Information Form”
- Click “Save & Continue”
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• “Candidate Requirements”
  • “Candidate’s Packet Due”: A deadline can be set for the candidate to submit the required documents
  • To add a due date, click on the “Calendar icon”
How to create a “Case” in Interfolio RPT

• Each “Packet Requirement” item listed includes guidelines for the section
• To access the guidelines, click on the “Open triangle” next to the item
How to create a “Case” in Interfolio RPT

• Under “Packet Requirements” you will see the list of documents required to be submitted by the candidate

• **IMPORTANT**: Do not make any changes to the items boxed in red below, these are university required documents and cannot be modified

• Other sections have been created for department/college to list documents required from the candidates for department/college review but will not be part of the final dossier. E.g. under “Other Teaching related Materials” the department could require the candidate to upload a teaching portfolio, class syllabi, examples of exams...

• TAB 13: Candidate OTHER Materials and Documents is meant for materials that cannot be included in Tabs 1-12 but will be included in the final dossier; please refer to the “Texas A&M University 2021-2022 P&T Guidelines” for additional information
How to create a “Case” in Interfolio RPT

• Example for how to add department/college specific “Packet Requirements”
• Under “Other Teaching Materials” click on “Add Requirements”
• In the popup window fill in the required information and click “Save”
• If the candidate can add sections to the packet, click the “check box”
• Click “Continue” at the end of the page to go to the next step
How to create a “Case” in Interfolio RPT

- “Internal Case Sections”
- **IMPORTANT**: do not change any thing in the “Settings” or “Sections” elements of the Case they are part of the University level template set up by the Office of the Dean of Faculties
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• “Case Review Steps”

• IMPORTANT: do not add or change any of the “Steps” they are part of the University level template set up by the Office of the Dean of Faculties

• IMPORTANT: If your department/college has a candidate with a true joint appointment, please contact the Office of the Dean of Faculties at facultyevaluation@tamu.edu to create a different template, with the correct workflow for that candidate

• Click “Continue” to go to the next step
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- “Case Summary”
- Lists all the elements of the “Template” for the Case created for a specific Candidate, no action is needed here
- Click on “Return to Case” to continue
How to create a “Case” in Interfolio RPT

- To send the “Case” to the Candidate click “Send Case”
- Select “Candidate: Notify Candidate” from the pulldown menu
- We recommend that a personal message be included with the email
How to create a “Case” in Interfolio RPT

• Example Notification email to the Candidate indicating that their “Case” has been created and is available for them to upload documents

![Email notification example]

Subject: 2021-2022 P&T case created

Message:
Your case for the 2021-2022 P&T cycle has been created in Interfolio and is ready for you to access and start uploading documents. Please click on “View Case” to log into Interfolio (step by step instructions of how to log in are available in Appendix VI of the 2021-2022 DOF P&T Guidelines (https://dof.tamu.edu/Faculty-Resources/CURRENT-FACULTY/Promotion-and-Tenure)).

If you have any questions about how to use Interfolio RPT to upload the required documents, please refer to Appendix VI of the 2021-2022 DOF P&T Guidelines (https://dof.tamu.edu/Faculty-Resources/CURRENT-FACULTY/Promotion-and-Tenure).
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• Example Notification email received by the Candidate

2021-2022 P&T case created
Texas A&M University <morphy@interfolio.com>
To: [Name], [Email]

Texas A&M University has initiated a review on your behalf.

VIEW CASE

Viewing your case will allow you to view requirements, read instructions, and submit your packet online.

Your case for the 2021-2022 P&T cycle has been created in Interfolio and is ready for you to access and start uploading documents. Please click on "View Case" to log into Interfolio (step by step instructions of how to log in are available in Appendix VI of the 2021-2022 DOF P&T Guidelines [https://dof.tamu.edu/Faculty-Resources/CURRENT-FACULTY/Promotion-and-Tenure]).

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