How to Request an External Evaluation through a 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
Requesting External Evaluations in Interfolio RPT

- Those who have Committee Manager or Administrator roles can request external evaluations.
- 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 user has access to.
- Under Review, Promotion and Tenure click on "Cases".
On the Case list, click the name of the case for which committee reports are needed to be uploaded to.
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- On the Case Materials tab, scroll down to “Internal Sections”
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• Click “Request Evaluation”
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• Enter the name and email of the external evaluator(s) on the Request External Evaluation page

![External Evaluator Information](image)

• Click “Add Another Evaluator” to request multiple external review requests at one time.
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- Enter the email message to the evaluator. See the University P&T Guidelines for solicitation message to be used.
- Note that you can set the **From Name** and **Reply-to** addresses.
- Make sure to give your email request a meaningful **Subject** line.
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- Attach files to the request email as appropriate.
  - Click “Add Files”
  - Select files to add to the request
- You can attach files from the case that may be useful for the evaluator. The files you add here can be downloaded by the recipient when they accept the invitation to write an evaluation.

Files

Files you add here can be downloaded by the recipient when they accept the invitation to provide an evaluation.

There are no files included in this request.

[Add Files]
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- Click "Preview Email" to see how the request email will appear to the external evaluator.
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- Set Response Settings
  - Enter deadline
  - Indicate whether or not the evaluator can submit additional files. If the box labeled “Can the evaluator submit additional files?” is checked, the evaluator will be presented with the option to add up to 10 additional files.
  - Choose who can access the request and the evaluation once it is uploaded
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• Click “Send Request”
  • The request (and the evaluation once it comes in) will appear in the External Evaluations section.
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- Your external evaluator will receive an email indicating they are being asked for an external evaluation.
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- Once they click “View Request”, it will take them into an Interfolio portal to accept or decline the request.
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- One they click “Accept”, they will be able to add their evaluation to the request and submit.
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- If they click “Decline”, they will be able to message the committee as appropriate.