College of Arts and Sciences

P&T Dossier and Interfolio Workshop

THE OHIO STATE UNIVERSITY
COLLEGE OF ARTS AND SCIENCES

June 17th, 2024

Welcome and Introductions

Shari Speer

THE OHIO STATE UNIVERSITY
COLLEGE OF ARTS AND SCIENCES

The Purpose of this Workshop

o   For: Candidates, P&T Chairs, PODs, TIU Heads, Dept. Staff

o   What: Overview of new Core Dossier Outline and Submission in Interfolio

o   Why: To Help Facilitate Preparation of Complete Dossiers for sixth-year promotion and tenure reviews and non-mandatory promotion reviews for Tenure-Track, Clinical/Teaching/Practice, and Research Faculty

➢   Chat function is available for questions

Agenda

- o Background Information
- o Navigating the Intranet
- o Candidate Packet
- o Interfolio Overview
- o Case Manager and Internal Sections
- o Final Logistics

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Background Information

Shari Speer

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

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Interfolio 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

Who Does What (TIU)   1

★ Candidate	✓ prepares and uploads Intro and Core Dossier to Interfolio ★ Uploads cumulative and individual SEI Reports to Interfolio ✓ submits publications, etc. for TIU review ✓ **completes and signs candidate checklist form in Interfolio for CEF meeting**
★ POD	✓ **verifies dossier for CEF meeting** ★ completes and signs POD Form 1 - Dossier Verification (prior to CEF meeting) ★ completes and signs POD Form 2 – Deliberative Body Verification (after CEF meeting) ★ POD or designee completes and signs Quorum, Vote, Vote Percentage Form (after the CEF meeting) ✓ **ensures fair evaluation by TIU** (CEF also responsible)
P&T Chair	✓ **reviews dossier for CEF meeting** ✓ chairs the TIU CEF meeting ✓ writes TIU CEF letter, addressed to TIU head and uploads to Interfolio

Who Does What (TIU) 2

TIU Head	✓ Solicits and includes review letters from Joint Appointment/Discovery Theme heads ✓ assigns someone to summarize student comments (if used) ✓ writes TIU head letter, addressed to College Dean and uploads to Interfolio ✓ Completes and signs TIU Head Recommendation Form
Case Manager	✓ compiles and uploads materials for internal sections (annual reviews, peer evaluations, external evaluations) ✓ generally, supports review and submission process

Who Does What (Regional Campus)

Faculty Deliberative Body Chair	✓ **reviews dossier for Regional Campus faculty meeting** ✓ chairs the Regional Campus Faculty Deliberative Body meeting ✓ writes Regional Campus Faculty Deliberative Body, addressed to Regional Dean and Director and uploads to Interfolio ⭐ completes the Regional Campus Faculty Vote Form
Dean and Director	✓ assigns someone to summarize student comments (if used) ✓ writes Regional Dean and Director letter, addressed to TIU Head and uploads to Interfolio ✓ completes and signs Regional Dean Recommendation Form
Case Manager	✓ collects Regional Campus review letters and assists with uploading to Interfolio if needed

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Who Does What in Faculty Affairs

Shari/Kristi:

- College Interfolio Administrator
- P&T process consultations for Chairs, Directors, P&T Chairs, PODs
- Dossier narratives, internal letters, candidate comments
- OAA, Legal Affairs liaison (negative cases, errors)

Toni:

- College Interfolio Administrator
- P&T process consultations for Chairs, Directors, P&T Chairs, PODS, and Staff
- 1st round of college dossier reviews (OAA policy, dossier format, TIU/College records, and SEI reporting)
- Final review of dossiers and submission to OAA
- OAA liaison

Kyle:

- College Interfolio Administrator
- 1st Round of College Dossier Reviews
- College Panel Document Logistics
- College Dean Document Logistics

Recommended Deadlines for TIUs

May 24	Submission of potential external reviewers to ASC Faculty Affairs for approval
June 10	Recommended deadline for candidate to submit materials for external review to the TIU
Sept. 9 ⭐	Recommended deadline for regional campuses to notify candidates of review decision and share internal letters (10 calendar day comments period commences)
Sept 20	Recommended deadline for regional campus letters to be sent to the TIU; Recommended deadline to solicit review letters from Discovery Theme/Joint Appointment heads
Sept. 27	Recommended deadline for CEF meeting; Last date to submit dossiers to ASC Faculty Affairs for preliminary college review
Oct. 4	TIU notifies candidates of review decision and shares internal letters (10 calendar day comments period commences)
Oct. 18	Recommended deadline for submission to college via Interfolio

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Timing Issues?

If your TIU is having scheduling/deadline/other issues, please contact us **immediately**.

ascfacultyaffairs@osu.edu

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What happens after you send to the college?

October - November   College Review of Dossiers & Revisions

December   College Panels Meet

January   Dean Reviews Cases and Writes Letter; Candidates notified of results

Late-January   Final Dossiers Submitted to OAA

April   Provost makes decisions; ASC notified

May   BOT makes final approval; Promotion/New Rank Takes Immediate Effect

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Ways to streamline the process? Start EARLY.

May/June

- Candidates prepare dossier materials
- Convert core dossier to new dossier outline

July/August

- P&T Chair and POD review core dossier to ensure completeness
- Staff begins to assemble case materials
- TIU Head solicits letters from any joint appointments

August/September

- P&T Chair begins drafting letter prior to meeting
- TIU Head beings drafting letters prior to receiving CEF letter
- Send core dossier to ascfacultyaffairs@osu.edu for a preliminary review

Reach out to ASC Faculty Affairs with questions at any time! ☺

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Navigating the ASC Intranet (https://ascintranet.osu.edu/)

Toni Calbert

Candidate Packet Materials: Introduction, Core Dossier, and SEI Reports

Toni Calbert

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Introduction

Brutus T. Buckeye
Campus Address
Campus Phone
email address

Biographical Narrative   – Puts previous appointments and /or interdisciplinary work in context (750 word limit)

Current Appointments

Assistant Professor, Microbiology
Assistant Professor, Molecular Genetics

Other Positions (if appropriate)

Degrees

Date   Degree, Institution
Date   Degree, Institution

Fellowships, Internships, Residency   (if appropriate – can delete if not)

New Core Dossier Outline

OAA revised the core dossier outline as part of the transition to Interfolio. Primary change is reordering of existing content.

- **Required** for faculty candidates for promotion and tenure (assistant to associate professor)
- **Optional** for faculty candidates for promotion (associate to full professor), can use Vita format
- 2 versions available on ASC Intranet:
  - Core dossier outline with highlighted instructions
    - Highlighted instructions must be deleted prior to submission
  - Core dossier template without instructions (also linked in the highlighted version)
  - Vita outline also available on the Intranet

Core Dossier - Time Frame

o **Teaching and Service** :

  ➢ Assistant Professors/Probationary Faculty: include activities from date of hire/start of current appointment

  ➢ Associate Professors/Non-probationary Faculty: include activities from date of last promotion/reappointment or last five years, whichever is most recent (e.g., 2019-2024)

o **Research/Awards** :

  ➢ all candidates may include their full research and award history (e.g., publications, creative works, grants, etc.)

CEF may allow earlier information if they determine it is important, must explain in CEF/TIU Head letter

  ➢ **Candidate must clearly indicate through subheadings or other notation entries before and after start of current appointment or last promotion/reappointment**

  ➢ P&T reviewers will focus on activities since start date or date of last promotion/ reappointment.

Core Dossier – General

What to Include in the Dossier

- TIU sets standards for what is allowed/expected in core dossier (field, APT)
- Candidates using the new core dossier outline should refer to the ASC Intranet instructions for detailed information on how to include activities (e.g., word counts for narratives, required info about advisees, grants, etc.).
- Candidates using the Vita format should refer to core dossier section of <u>OAA P&T Handbook</u> for instructions.
- TIU is responsible to enforce all entries

Narratives should focus on IMPACT of activities

- Avoid redundancy with citation lists included later
- Research narratives should be written for general audience
- If too long/technical, won't be read (which defeats the purpose)

Publications/grants/etc. should be listed ONCE

- Exception is publications by grad students, which can be listed under both teaching and research

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Core Dossier – General

Reverse Chronological Order
- All activities listed in the core dossier should start with current/most recent first

Include all item headings and subheadings
- If a candidate has no entries for a particular section, enter "None"

Core dossier must be checked by TIU (POD/mentors/etc.) BEFORE eligible faculty meeting

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New Core Dossier Outline Walkthrough

See new core dossier outline available on [ASC Intranet Promotion and Tenure](#) page.

⭐ SEI Reports (New to Candidate Packet)

- ### Cumulative Fixed - Response Survey Data
  (summary of all courses – generated by SEI / Blue systems)

- ### Individual Fixed - Response Student Evaluation Data
  ("Overview Report" - single page report for each course – since date of hire for probationary faculty; since last promotion/reappointments, or last 5 years whichever is shorter, for non-probationary faculty)

See "SEI Reports for P&T Dossiers" document on the ASC Intranet (Dossier Prep Materials) for explanation of different reports and which to use for P&T

Cumulative SEI pre-2018

[Instructor Name]

Cumulative Student Evaluation of Instruction Summary

Report generated on 10/14/2019

NOTE TO INSTRUCTOR: Mark the "Multi Inst" box for course sections that were team taught or had more than one instructor. "Web" is "Y" if student ratings were collected electronically.

Comparison groups are based on class size (Small, Medium, Large) and electivity (Required, Free, Choose). See individual reports for more details.

SEI Item Descriptions
1. Well organized
2. Intellectually stimulating
3. Instructor interested in teaching
4. Encouraged independent thinking
5. Instructor well prepared
6. Instructor interested in helping students
7. Learned greatly from instructor
8. Created learning atmosphere
9. Communicated subject matter clearly
10. Overall rating

EDUTL 5992 College: EHE Campus: COL

				1	2	3	4	5	6	7	8	9	10	Item 10 Comparison
Multi Inst 2016 Spr	Class Num: 13XXX		Instructor Mean	4.0	4.0	4.0	5.0	4.0	5.0	4.0	4.0	4.0	5.0	4.6
#Enrolled: 5	#Resp: 1	Web: Y	Instructor SD	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

ENGINEER 181 College: ENG Campus: COL

				1	2	3	4	5	6	7	8	9	10	Item 10 Comparison
Multi Inst 2008 Autmn	Class Num: 8XXX		Instructor Mean	3.9	3.5	4.3	3.9	3.6	4.1	3.3	3.7	3.6	3.7	4.2
#Enrolled: 71	#Resp: 106	Web: N	Instructor SD	1.1	1.1	0.8	0.9	1.0	0.9	1.1	0.9	1.0	0.8	
Multi Inst 2008 Autmn	Class Num: 8XXX		Instructor Mean	3.9	3.4	4.5	3.8	3.7	4.4	3.4	3.9	3.8	4.1	4.3
#Enrolled: 36	#Resp: 24	Web: N	Instructor SD	1.3	1.2	0.6	0.8	1.1	0.5	1.0	0.7	0.7	0.6	

ENGINEER 191.01H College: ENG Campus: COL

				1	2	3	4	5	6	7	8	9	10	Item 10 Comparison
Multi Inst 2009 Autmn	Class Num: 10XXX		Instructor Mean	4.1	4.0	4.5	4.2	3.9	4.4	4.1	4.1	3.7	4.0	4.3
#Enrolled: 36	#Resp: 17	Web: Y	Instructor SD	0.8	0.8	0.7	0.9	0.8	0.7	0.9	1.1	1.0	0.8	
Multi Inst 2011 Autmn	Class Num: 21XXX		Instructor Mean	4.2	4.1	4.6	4.2	4.0	4.4	3.8	4.3	3.3	3.9	4.2
#Enrolled: 35	#Resp: 29	Web: Y	Instructor SD	1.0	0.9	0.6	0.7	1.0	0.7	1.1	0.7	1.2	0.9	
Multi Inst 2011 Autmn	Class Num: 21XXX		Instructor Mean	4.4	4.1	4.4	4.2	4.0	4.4	3.8	3.8	3.7	4.2	4.2
#Enrolled: 37	#Resp: 23	Web: Y	Instructor SD	1.0	1.0	1.0	1.0	1.1	1.0	1.0	1.0	1.1	0.7	

ENGINEER 192.01H College: ENG Campus: COL

				1	2	3	4	5	6	7	8	9	10	Item 10 Comparison

1/1

Cumulative SEI 2018-present

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Brutus Buckeye SEI Cumulative Report
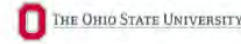
Mean Scores, all questions

Courses are listed in order by course number, then term

Q1: The subject matter of this course was well organized
Q2: This course was intellectually stimulating
Q3: This instructor was genuinely interested in teaching
Q4: The instructor encouraged students to think for themselves
Q5: The instructor was well prepared
Q6: The instructor was genuinely interested in helping students
Q7: I learned a great deal from this instructor
Q8: The instructor created an atmosphere conducive to learning
Q9: The instructor communicated the subject matter clearly
Q10: Overall, I would rate this instructor as

Subject	Course	Class	Term	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10
Overall				4.16	4.05	4.51	4.40	4.44	4.45	4.01	4.18	4.11	4.38
SAMPLE	1100	12345	AU 18	4.27	4.23	4.81	4.58	4.58	4.46	4.46	4.27	4.31	4.50
SAMPLE	2200	5678	SU 18	4.04	3.87	4.22	4.22	4.30	4.43	3.57	4.09	3.91	4.26

Response Count and University Comparison

Comparison of the instructor's mean score for Q10 to the University mean for classes in the same size group during the same term

Subject	Course	Class	Term	Size	Resp	Mean, Instr	Mean, Univ
SAMPLE	1100	12345	1188	M	26	4.50	4.34
SAMPLE	2200	5678	1184	M	23	4.26	4.43

1/1

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Fixed SEI pre-2018

Fixed SEI 2018 -present

Fixed SEI pre-2018 (left document)

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Brutus Buckeye
Course: ENGLISH XXXX
Campus: COL   College: ASC

Student Evaluation of Instruction Report

Autumn 2017
Class Number: 19165

Response rate: 61.1 % of 18 enrolled   Were student ratings for this report collected on the web? Yes   Date of Report: 02/08/2015

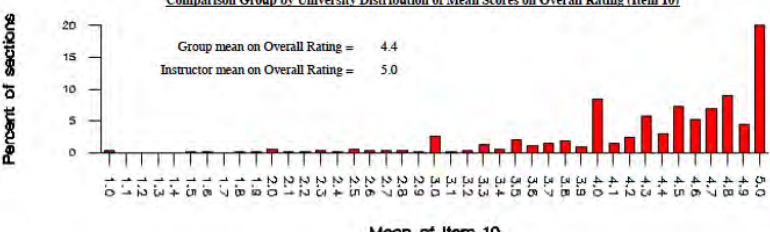*Response scale is Likert-type with "5" being high and "1" being low*

	N	1	2	3	4	5	N/A
1. Well organized	11	0 %	0 %	0 %	0 %	100 %	0 %
2. Intellectually stimulating	11	0	0	0	0	100	0
3. Instructor interested in teaching	11	0	0	0	0	100	0
4. Encouraged independent thinking	11	0	0	0	9	91	0
5. Instructor well prepared	11	0	0	0	0	100	0
6. Instructor interested in helping students	11	0	0	0	0	100	0
7. Learned greatly from instructor	11	0	0	0	0	100	0
8. Created learning atmosphere	11	0	0	0	0	100	0
9. Communicated subject matter clearly	11	0	0	0	18	82	0
10. Overall rating	11	0	0	0	0	100	0

Your ratings are summarized below. When sufficient data exist, summaries are also provided for up to three reference groups. Your "comparison group" is based on the size of your class and the predominant reason students indicate they enrolled. Comparison group data are reported at both the college and university levels. Over the preceding 4 quarters, 1547 instructors and 3053 course sections were in your Comparison Group by College, and 2746 instructors and 5526 course sections were in your Comparison Group by University. Across all the courses using the SEI instrument since 1994, 27.36% of them share the characteristics listed below. The Course-Offering Unit listing is not based on size or electivity; it is a summary of the SEI data across the previous four quarters in your department or school.

Your comparison groups have the following qualities:
   Class size: 5 to 20
   Predominant reason given for enrolling in this course was that it was required in the student's major/minor or that it fulfills a GEC/BER requirement.

	This Instructor		Comparison Group by College		Comparison Group by University		Course-Offering Unit	
	Mean	Std.Dev	Mean	Std.Dev	Mean	Std.Dev	Mean	Std.Dev
1. Instructor well organized	5.0	0.0	4.3	0.7	4.3	0.7	4.3	0.5
2. Intellectually stimulating	5.0	0.0	4.3	0.6	4.3	0.7	4.3	0.5
3. Instructor interested in teaching	5.0	0.0	4.5	0.6	4.5	0.7	4.6	0.4
4. Encouraged independent thinking	4.9	0.3	4.5	0.6	4.5	0.7	4.6	0.4
5. Instructor well prepared	5.0	0.0	4.4	0.7	4.4	0.7	4.5	0.5
6. Instructor interested in helping students	5.0	0.0	4.5	0.6	4.5	0.7	4.6	0.4
7. Learned greatly from instructor	5.0	0.0	4.3	0.8	4.3	0.8	4.2	0.6
8. Created learning atmosphere	5.0	0.0	4.4	0.7	4.3	0.8	4.4	0.5
9. Communicated subject matter clearly	4.8	0.4	4.3	0.8	4.3	0.8	4.3	0.6
10. Overall rating	5.0	0.0	4.4	0.7	4.4	0.7	4.5	0.5

Comparison Group by University Distribution of Mean Scores on Overall Rating (Item 10)

Group mean on Overall Rating =   4.4
Instructor mean on Overall Rating =   5.0

(Percent of sections vs. Mean of Item 10)

Policies and procedures regarding SEI reports are addressed in the SEI handbook. See www.sei.osu.edu for more information.
Report generated by the Office of the University Registrar. Questions may be e-mailed to <seiadmin@osu.edu>.

Fixed SEI 2018 -present (right document)

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Brutus Buckeye SEI Overview Report Autumn 2018

Classes included in this report:
Subject Catalog Number Class Number
ABCDE 1100   99999

	Invited#	Response#	%(1)	%(2)	%(3)	%(4)	%(5)	%(N/A)
1. The subject matter of this course was well organized	39	39	3 %	0 %	3 %	41 %	54 %	0 %
2. This course was intellectually stimulating	39	39	0 %	0 %	3 %	38 %	59 %	0 %
3. This instructor was genuinely interested in teaching	39	39	0 %	0 %	0 %	10 %	90 %	0 %
4. The instructor encouraged students to think for themselves	39	39	0 %	0 %	0 %	15 %	85 %	0 %
5. The instructor was well prepared	39	39	0 %	0 %	3 %	21 %	77 %	0 %
6. The instructor was genuinely interested in helping students	39	39	0 %	0 %	0 %	15 %	85 %	0 %
7. I learned a great deal from this instructor	39	39	0 %	0 %	3 %	54 %	44 %	0 %
8. The instructor created an atmosphere conducive to learning	39	39	0 %	3 %	3 %	18 %	77 %	0 %
9. The instructor communicated the subject matter clearly	39	39	0 %	3 %	0 %	38 %	59 %	0 %
10. Overall, I would rate this instructor as	39	39	0 %	0 %	5 %	15 %	79 %	0 %

Your mean scores are listed below. The College and University comparison groups are based on the size of your class. The Department group s not. Class size groups are 1-19, 20-60 and 61+.

Question	Instructor		Department (ABCDE)		College (Sample M)		University (1188 M)	
	Mean	Standard Deviation	Mean	Standard Deviation	Mean	Standard Deviation	Mean	Standard Deviation
1. The subject matter of this course was well organized	4.44	0.79	4.17	0.98	4.21	0.99	4.22	0.99
2. This course was intellectually stimulating	4.56	0.55	4.30	0.95	4.15	1.02	4.14	1.03
3. This instructor was genuinely interested in teaching	4.90	0.31	4.59	0.73	4.41	0.91	4.44	0.89
4. The instructor encouraged students to think for themselves	4.85	0.37	4.51	0.78	4.35	0.91	4.37	0.89
5. The instructor was well prepared	4.74	0.50	4.37	0.88	4.32	0.96	4.34	0.95
6. The instructor was genuinely interested in helping students	4.85	0.37	4.47	0.79	4.40	0.92	4.42	0.90
7. I learned a great deal from this instructor	4.41	0.55	4.14	1.04	4.10	1.10	4.12	1.08
8. The instructor created an atmosphere conducive to learning	4.69	0.66	4.27	0.94	4.23	1.00	4.24	1.00
9. The instructor communicated the subject matter clearly	4.54	0.64	4.21	1.01	4.15	1.09	4.17	1.07
10. Overall, I would rate this instructor as	4.74	0.55	4.40	0.89	4.31	1.00	4.34	0.98

Interfolio Overview

Toni Calbert

Interfolio Functions

Interfolio should only be used to upload documents and complete forms. Eligible faculty **do not** need to use the system for document review or voting.

- o Dossier materials should be shared for review with the Committee of Eligible Faculty and P&T support staff outside of Interfolio.

- o Faculty comments and discussion should be conducted outside of Interfolio.

- o Internal letters should be composed outside of the system and uploaded when final.

- o External letters should be solicited outside of the system and uploaded when final.

Interfolio Walkthrough

https://go.osu.edu/interfolio

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Candidate Step

1. APT (Only if not using current document)
2. Introduction (Word/PDF file)
3. Core Dossier (Word/PDF file)
4. SEI Reports and Form (Interfolio embedded form)
5. Promotion/Promotion and Tenure Candidate Checklist (Interfolio embedded form)

   ➢ "Submit" will Lock sections

   ➢ Only the Candidate can delete files they upload

   ➢ Candidate cannot see Internal Sections

Provide Case Manager with supporting materials

- Annual reviews

- Peer evaluations

★ POD Step 1 of 2

- POD serves as Committee Manager for the POD Step 1

- After Candidate uploads and submits dossier materials, POD is notified and gains access to the case

- POD must complete and sign POD Form 1 Dossier Verification

- POD sends the case forward

Regional Campus Step

Three steps in Interfolio

- Regional Campus Faculty Deliberative Body – upload regional faculty recommendation letter

- Regional Campus Vote – record results and requirements of regional campus faculty vote

- Regional Campus Dean and Director – upload regional dean recommendation letter and complete recommendation form

  - Regional Campus Comments Process – Regional campus notifies candidates of review decision and shares internal letters (10 calendar day comments period commences)

Committee of the Eligible Faculty Step (P&T Chair)

- P&T Chair serves as Committee Manager for the CEF step

- P&T Chair is notified when the case moves forward and gains access to this step in the process

- P&T Chair must upload the CEF Recommendation Letter

- P&T Chair sends case forward to POD 2 step

POD Step 2 of 2

- POD serves as Committee Manager for the POD Step 2

- POD must complete and sign POD Form 2 - Deliberative Body Verification

- POD is also responsible for completing Quorum and Vote form

  - POD may assign to Case Manager

- POD sends the case forward to TIU Head

TIU Head Step

- TIU Head serves as Administrator for their unit and Committee Manager for the TIU Head step

- After P&T Chairs uploads the CEF letter, TIU Head is notified and gains access to this step in the process

- TIU Head must upload their recommendation letter and complete the TIU Head Recommendation Form

- TIU Head must then initiate the notification and comments process

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Candidate Comments Process

- TIU Head or Case Manager can complete the comments process outside of Interfolio via Outlook

- Candidate must be notified of the results of the TIU review, given the option to review the TIU Faculty and TIU Head letters, and provided at least 10 days to comment

- Candidate must respond either with any comments or a statement that they have no comments.
    - If Candidate has comments, TIU Head or CEF may respond as appropriate
    - Only one round of comments is permitted

- Case Manager then uploads candidate comments and any responses to the TIU-Level Comments Process section and forwards case to Associate Dean Review step.

Case Manager and Internal Sections

Toni Calbert

Case Manager Role

- Typically, the administrative staff member who supports P&T in your unit

- Has access to the case (Candidate Packet and Internal Sections) from creation of case to submission to College

- The Case Manager uploads candidates' review materials
  - Annual Reviews
  - Peer Evaluations
  - External Evaluations
  - Student Comment Summaries

- Can assist with replacing files in case of revisions

- May complete other steps in the process; varies by unit

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Case Manager Role (continued)

- **The Case Manager Can:**
    - Upload files in all sections
    - Delete files added by committee
    - Lock and unlock candidate sections
    - Manage committees and members
    - Move cases forward and backward

- **The Case Manager Cannot:**
    - Complete forms unless designated as a Committee Manager in a given step
    - Delete files added by the candidate

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Internal Sections

1. Annual Reviews
2. Written Documents Submitted as Part of Annual Reviews
3. Additional Letters Requested by Candidate
4. Peer Evaluations
5. Summary Sheet of All External Evaluators (Form 114)
6. Sample of Letters Sent to External Evaluators
7. External Letters Preceded by Cover Sheet (Form 106)
8. Summary of Student Comments
9. Head of Joint Appointment/DT Review Letter
10. Candidate Comments

#1-9 must be provided to the CEF before their meeting but do not need to be uploaded to Interfolio at that time

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 2019
Smith Annual Review 2020
Smith Annual Review 2021

Peer Evaluations

Smith Peer Eval AU19 (Meyers)
Smith Peer Eval SP21 (Cane)
Smith Peer Eval SP21 (Johnson)

External Evaluations

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

Upcoming Case Manager Workshop

ASC Faculty Affairs will be holding an in-depth Interfolio workshop for Case Managers prior to the start of the Autumn semester. We'll reach out with more info soon!

Final Logistics

Shari Speer

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Interfolio: Things to Note

- Cases can only be moved forward or backward one step at a time

- Double check bookmarks in PDFs - they may create tabs in the Interfolio "Read Case" view

- Cases will not move forward until all requirements are completed under the "Case Details" tab

- Interfolio remains a work in progress:

  o Occasional glitches may occur.

  o Candidates and units will be held harmless for issues due to software change.

  o Contact ASC Faculty Affairs with any concerns or questions.

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Interfolio: Future Functions

- Faculty Activity Reporting (FAR)
  - Direct entry of faculty activities into Interfolio
  - Intended to eventually replace core dossier Word document
  - Expected to launch July 9th
  - NOT required for P&T or annual reviews for 2024-2025

- External Evaluations
  - Starting 2025-2026
  - Direct communication with and collection of letters from external evaluators within Interfolio

New Information

If a candidate has new information about items <u>already</u> in dossier:

- Can be added if TIU hasn't yet reviewed

- If TIU is done but <u>before </u>submission to college, TIU head asks CEF if this new information would change their vote <u>even if</u> the vote was positive and/or unanimous

- If at the college, alert Kristi Williams (.2339) and divisional dean; college will decide next steps

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Submission Date: <mark>October 18th</mark>

Send cases forward to the Associate Dean 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

- Any further changes to this year's process will be communicated

Faculty Affairs Team

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Thank you!

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