College of Arts and Sciences

# Interfolio Workshop for Case Managers

THE OHIO STATE UNIVERSITY
COLLEGE OF ARTS AND SCIENCES

August 14 th, 2024

# Welcome and Introductions

## Kristi Williams

# The Purpose of this Workshop

- For: Dept. Staff, P&T Chairs, and PODs
- What: Overview of Interfolio for P&T Staff
- Why: To help familiarize staff with Interfolio and facilitate preparation of P&T dossiers for faculty candidates

  ➢ Chat function is available for questions

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# 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

# Agenda

- o Interfolio and RPT Overview

- o Case Managers

- o Interfolio RPT Walkthrough

- o Interfolio FAR

- o Resources

- o Q&A

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# Interfolio and RPT Overview

## Toni Calbert

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# Interfolio Modules

## Review, Promotion & Tenure (RPT)

- Released August 2023

- Promotion/Promotion and Tenure Reviews

- 4th year Reviews

- Reappointment Reviews

## Faculty Activity Reporting (FAR)

- Released July 2024
  - <u>Not</u> required for 2024-25

- Annual Reviews

- Teaching, Research, Service reporting for RPT

# 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 Roles by Level

| Department | TIU Head, Case Manager, P&T Chair, POD |
|---|---|
| College | Faculty Affairs, Divisional Deans, College Dean, College Panels |
| University | OAA |

# RPT Workflow

1. Template
2. Case
3. Candidate Packet
4. Internal Sections
5. Case Review Steps
   - TIU Review: POD, Regional Campus, CEF, TIU Head
   - College Review: Faculty Affairs, College Panels, College Dean
   - University Review: OAA and University Committees

# Case Managers

# Kyle Williams

# 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 to Internal Sections

- Can assist with replacing files in case of revisions

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

# Case Manager Role (continued)

- **The Case Manager Can:**

  o Upload files in all sections

  o Delete files added by committee

  o Lock and unlock candidate sections

  o Manage committees and members

  o Move cases forward and backward

- **The Case Manager Cannot:**

  o Complete forms unless designated as a Committee Manager in a given step

  o Delete files added by the candidate

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# Candidate Packet

- Candidate responsible for uploading required files and completing forms

- When Candidate "Submits" this locks the section and moves the case forward to the POD Review 1 step

  - Case Managers can also move the case forward to POD

- Case Managers can lock and unlock candidate packet sections if needed

- Anything candidate uploads, only candidate can delete

# Internal Sections (TIU)

| | |
|---|---|
| POD Verification* | Summary of Open-Ended Student Evaluations |
| Annual Reviews | <mark>Regional Campus Faculty Deliberative Body Recommendation*</mark> |
| Written Documents Submitted as Part of Annual Reviews | <mark>Regional Campus Dean Recommendation*</mark> |
| Additional Letters Requested by Candidate | <mark>Comments Process – Regional Campus</mark> |
| Documentation of Peer Evaluations | CEF Recommendation* |
| Summary Sheet of All External Evaluators (Form 114) | TIU Head Recommendation* |
| Sample of Letters Sent to External Evaluators | Head of Joint Appointment/DT Review Letter |
| External Letters Preceded by Cover Sheet (Form 106) | Comments Process – TIU Level |

# 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 | Peer Evaluations | External Evaluations |
|---|---|---|
| Smith Annual Review 2019 | Smith Peer Eval AU19 (Meyers) | Smith External Eval (Evans) |
| Smith Annual Review 2020 | Smith Peer Eval SP21 (Cane) | Smith External Eval (Dalton) |
| Smith Annual Review 2021 | Smith Peer Eval SP21 (Johnson) | Smith External Eval (Kirk) |

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# Interfolio  RPT Walkthrough

# Toni Calbert

# Log in to Interfolio

https://go.osu.edu/interfolio

- Enter OSU name.# and password

- "Where do you want to go?"

-  Select Ohio State logo, NOT the Interfolio dossier logo

Google "Interfolio"

- Select Login > Sign in with Partner Institution

- Enter Ohio State University

# Case Review Steps (TIU)

## Columbus Campus

1. POD Review 1
2. CEF
3. POD Review 2
4. TIU Head Review

## Regional Campus

1. POD Review 1
2. Regional Campus Faculty Deliberative Body
3. Regional Campus Vote
4. Regional Campus Dean/Director
5. CEF
6. POD Review 2
7. TIU Head Review

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# Case Review Steps

- Steps represent movement through the review process after Candidate submission – not currently in real time (e.g., TIU review may finish before materials uploaded in Interfolio)

- Each step has a required action: upload document and/or fill out form

- Cases can be moved forward or backward, only one step at a time by Case Manager, TIU Head, Committee Manager

# Case Review Steps

Internal Sections w/asterisk linked to Case Review Steps

- Files uploaded directly to these sections will NOT fulfill the step requirement; additional action is needed to add file via the "Case Details" tab (Add > Select file from case)

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# Case Review Steps - Committees

- Each step has a committee, committee members get access to the case at their step

- One or more member of the committee can be designated committee manager (star)

- Any committee member or Case Manager can upload documents

- **Only the committee manager can access and complete forms**

# Case Review Steps - Committees

- Case Managers can add and edit committee members, designate committee managers

- Starting Spring 2025 – Case Managers will be responsible for adding committee members/managers for their units

# Case Review Steps - Committees

- Multiple committee managers

  - Generally, avoid designating more than one person as committee manager

  - Each manager will have to complete step requirements

  - **EXCEPTION**: POD Review 2 step which has two forms which may be completed by POD and Case Manager

    - POD > Deliberative Body Form > Manage Respondents > Omit Requirement for Case Manager

    - Case Manager > Quorum, Vote Form > Manage Respondents > Omit Requirement for POD

# Case Review Steps – Regional Campus Steps

Where Regional Campus P&T contacts are known, they should be added to the Regional Campus steps committees to complete the requirements

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

- Regional Campus Vote – record results on faculty vote form

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

# P&T Submission Date: October 18th

**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

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# Faculty Activity Reporting (FAR)

Toni Calbert

# FAR Overview

- Replaces Vita

- Faculty can directly enter teaching, research, and service activities

- Will be used to create annual activity reports for annual reviews and replace the core dossier for P&T reviews

  - **NOT required and should not be used for P&T 2024-2025**

- Staff and student employees may be asked to enter faculty information

# FAR Users and Roles

- **Faculty** – tenure track, clinical/teaching/practice, and research faculty are automatically added as users in the system

- **Staff and student employees** – can be granted proxy access to enter activities on behalf of faculty

  - RPT access does not grant FAR access

  - Requests for staff or student accounts MUST come through ASC Faculty Affairs

- Faculty are responsible for information input into their account; Interfolio does not log entries, so it is not possible to track when or by whom information is added

# FAR Emulate User Function

- Log into Interfolio

- Go to "Faculty Activity Reporting" Menu

- Select Administration > Administration > Emulate User

- Select name of faculty member

- Make any edits or entries

- Select "Exit Emulation" when finished

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# FAR Profile and Activities

- Profile: equivalent to P&T Introduction: personal info, biographical narrative, current and past appointments, degrees, etc.

  - Personal info, appointments pulled from Workday

  - If information is incorrect, likely a Workday issues – contact your unit's HR Consultant

- Activities: equivalent to new Core Dossier outline

  - Courses are pulled from Registrar – cannot be edited in Interfolio

  - All other activities must be manually entered

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# Resources

## Kyle Williams

# Resources

- [ASC Intranet – Promotion and Tenure](#)

- [OAA Interfolio page](#)

- Interfolio Help pages

  - [User Roles](#)

  - [Getting Started with RPT](#)

  - [Getting Started with FAR](#)

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# ASC Faculty Affairs Team

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Thank you!