Committee Member's Guide to Interfolio Review, Promotion, and Tenure

If you have been added to a committee at an institution that uses Interfolio Review, Promotion, & Tenure, you can securely and easily participate in the case review process online.

An Administrator at the institution conducting the review will manage the case and candidate packet. You will receive an email when the case is available for your committee to begin review.

Once you activate your free account and log in, you will be able to access any case to which you have been added as a committee member.

Getting started & accessing your assigned cases:

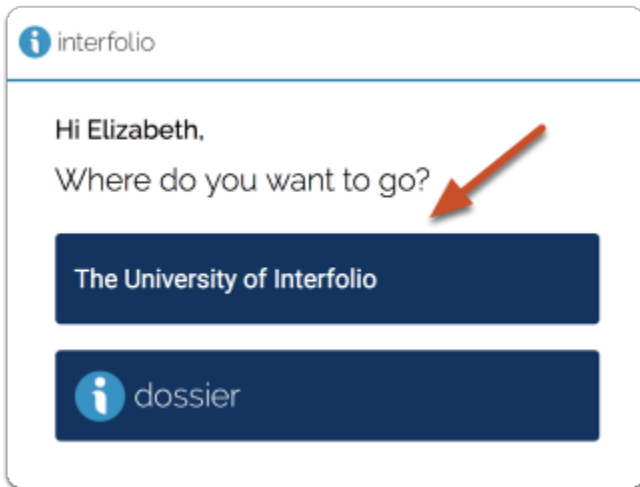### You will receive notification when you are added as a user to Review, Promotion & Tenure

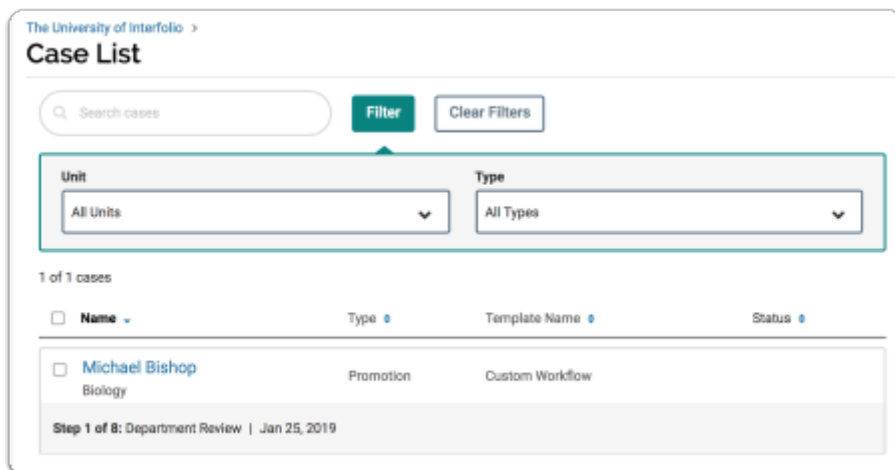# Log in and select your institutional account

Select "Cases" under Review, Promotion & Tenure on the left hand navigation bar
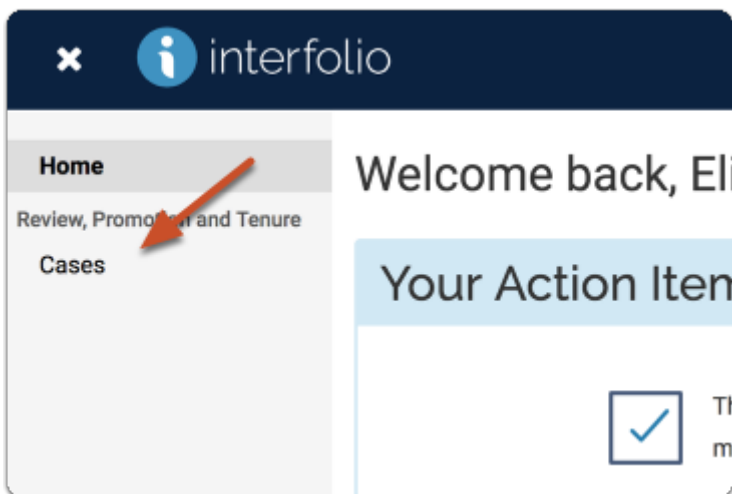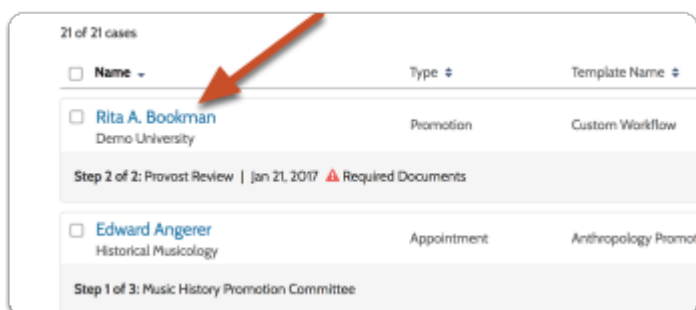

You will see a list of cases that are available to you

💡 Note that you can filter this list by unit and case type.

Click the name of the candidate to view case materials

The case page:

Clicking on the name of the candidate will direct you to the case page, shown below, where you can access materials and forms available to committee members, and view and download materials submitted by a candidate.

Note that the case page is a tabbed interface, the "Case Materials" tab, and the "Case Details" tab.
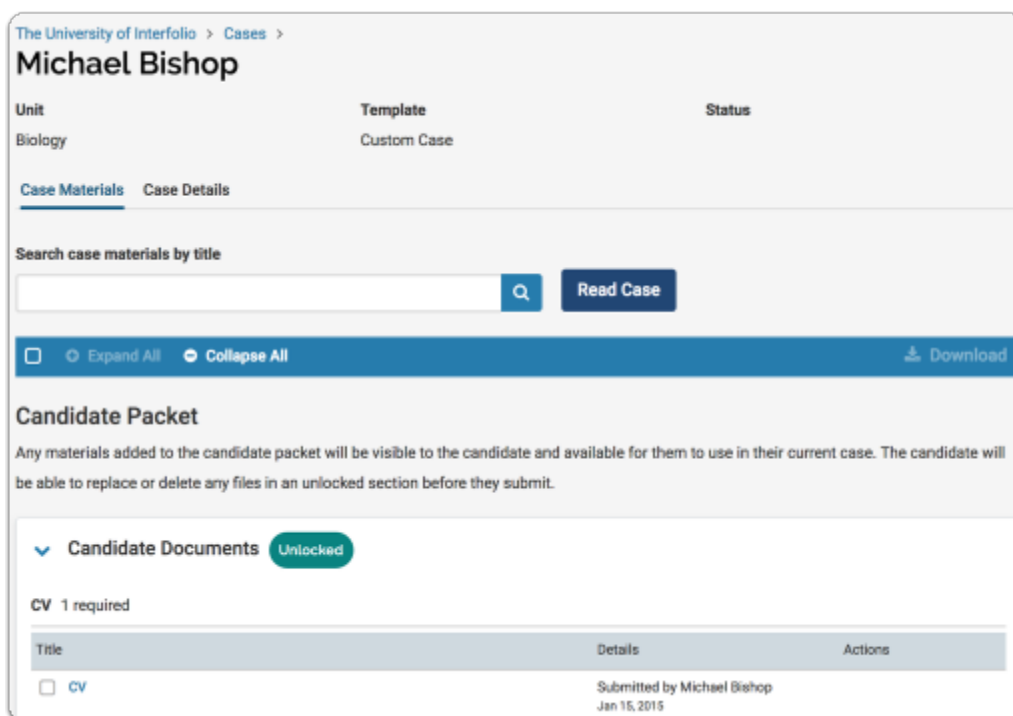
Case Materials

The Case Materials tab is divided into two main parts that can each contain one or more sections; the candidate packet, and internal (case) sections.

The Candidate Packet is made up of one or more sections the candidate will see when adding materials. These sections contain materials added to the candidate packet, either by the candidate or on their behalf, and any required forms completed by the candidate.

Materials here will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section of the candidate packet before they submit their packet for review.

Internal Sections are case sections available to committee members reviewing the case and cannot be viewed by the candidate. Here you will find materials you may need as part of your review such as committee documents.

Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

You may see an internal section labeled "External Evaluations" if your institution has elected to use our feature for requesting and collecting evaluations from external reviewers.

> ℹ️ You may also see a section labeled "Migrated Case Materials." This section contains materials that were originally in the Candidate Packet section, but that we moved as a precaution because materials in the Candidate Packet are visible to the candidate.
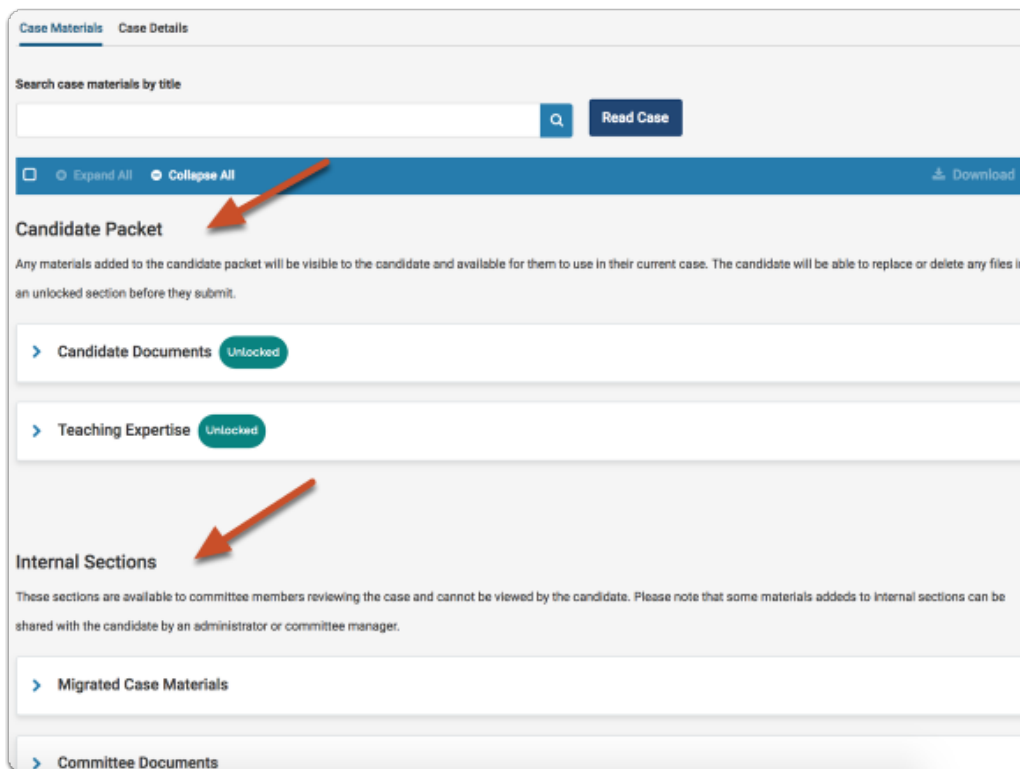
Case Details

1. The Case Details tab is where you can view the other members of your committee
2. If enabled, you can also view comments from other committee members, and leave comments on the case
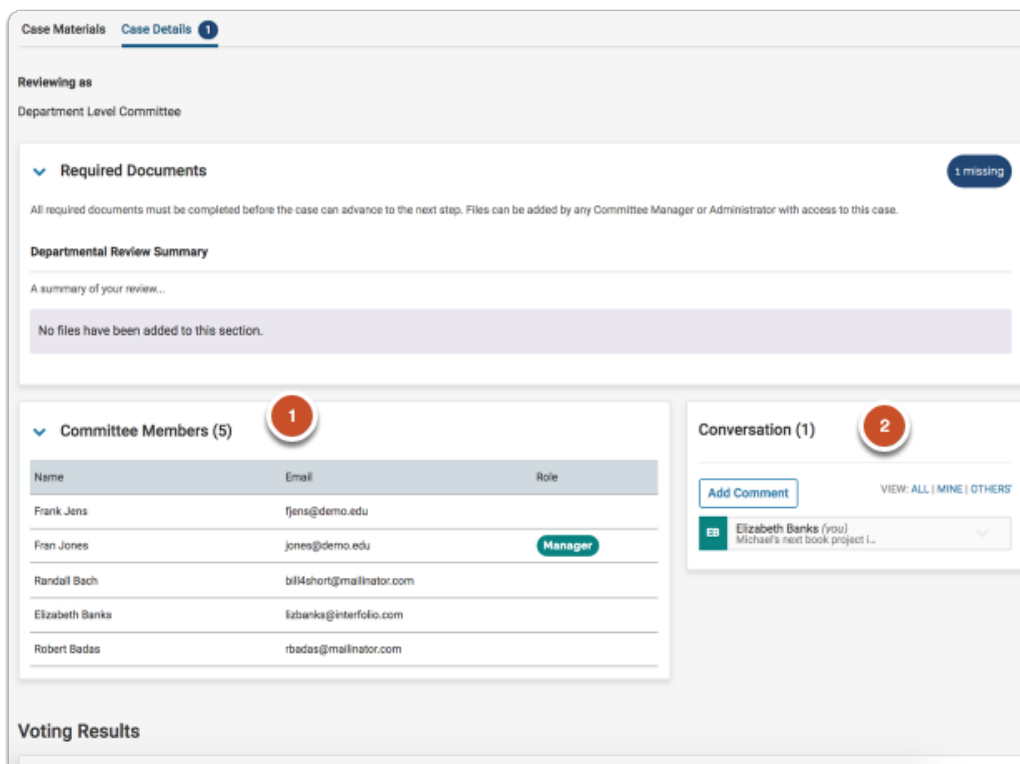
Committee voting results

If a committee vote has taken place and the results have been recorded by the Committee Manager or Administrator, you can also see those results at the bottom of the Case Details tab.
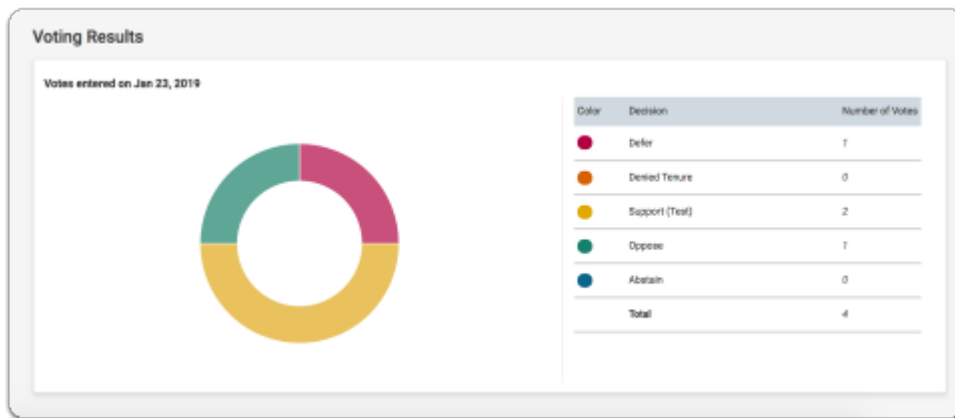
Accessing materials:

On the "Case Materials' tab of the case page, you can read or download documents that were submitted by the candidate, committee members, and external evaluators.

If the institution administering the case has elected not to allow downloading, the Download option will not be available. Some individual documents may also have downloading restricted.

Search for case materials by title

You can search for particular case materials by title. This acts as a filter, displaying only materials with a matching title.

Click "Read Case" to load all accessible case materials into our document viewer where they can be viewed online

> 💡 You can also click on the title of a document to open that specific document in the document viewer.
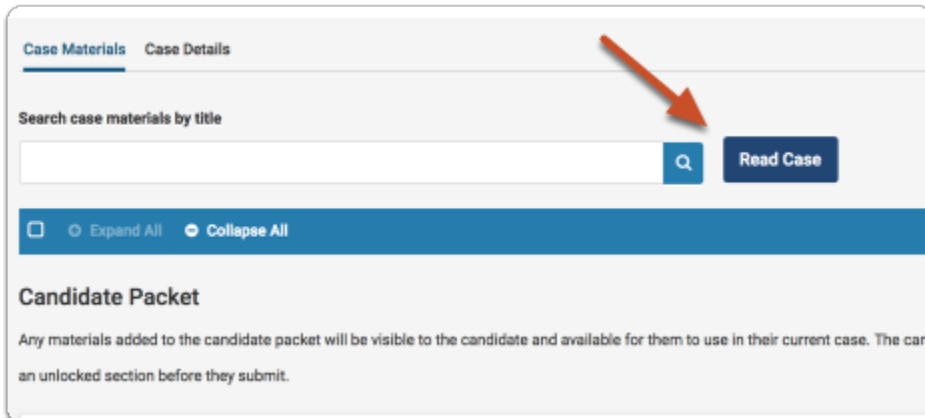

The document viewer displays all materials organized by sections. Note that you can download materials (if enabled), search through the PDF files of materials, and leave annotations on the materials.
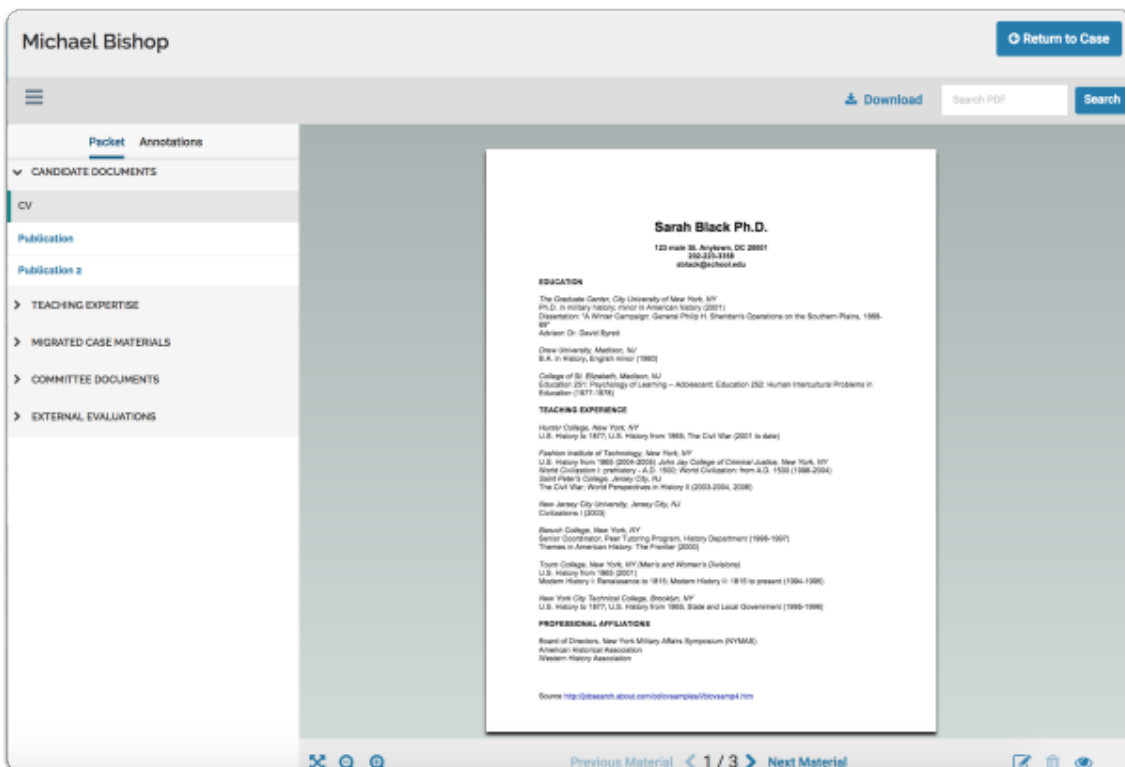
To download a PDF or Zip file of all selected materials, select one or more materials from the list, then click the "Download" button at toward the top right of the page

Click the check box in the blue bar above the list to select all materials listed, or select one or materials to download.
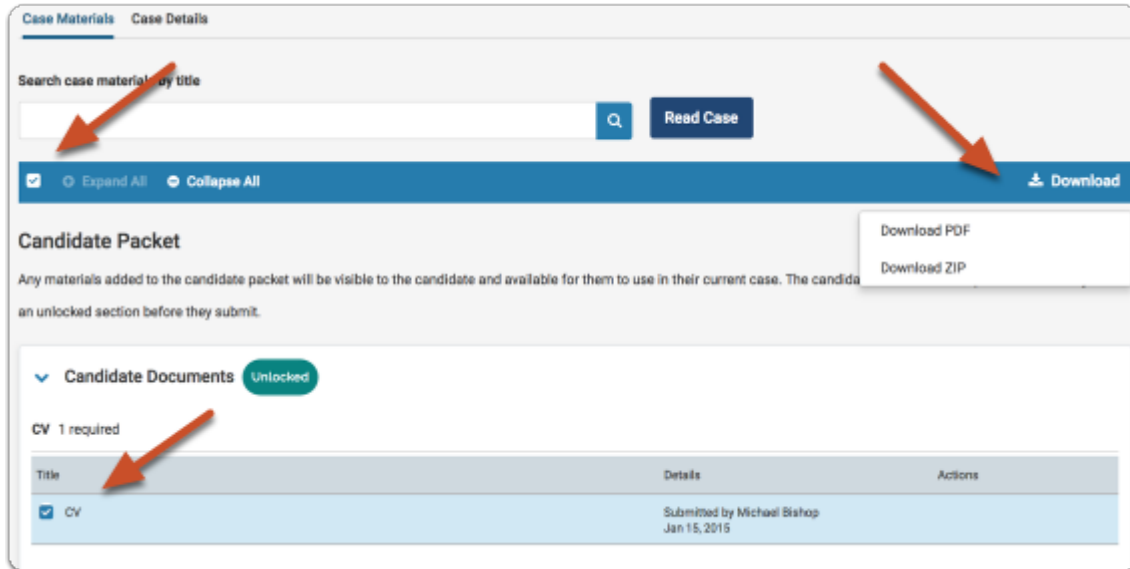
Adding annotations when reviewing materials in the document viewer:

You can make notes on materials as you review. The annotations you make will appear on their own tab and can be exported

> **ⓘ** Annotations are private and can only be viewed by you.
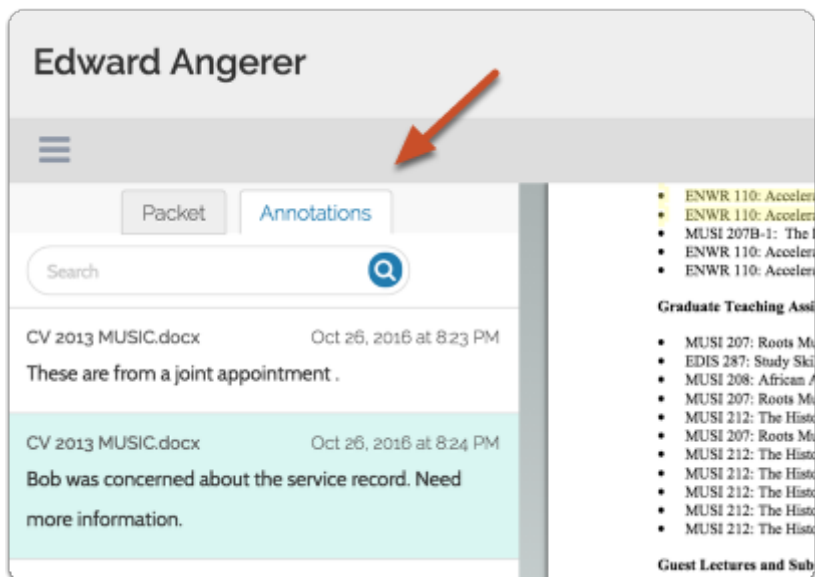
Annotations are added from the lower right corner of the viewer

Click the "view" icon to toggle on or off the display of annotations

Click the "note" icon to add an annotation on the currently displayed document
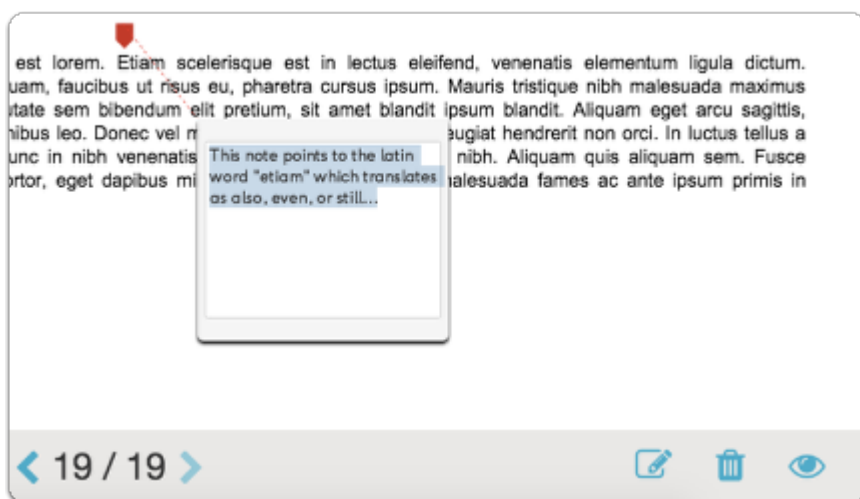

# After clicking the "note" icon, select the type of annotation you want to create:

- Make no selection to add a simple "stickie" note to the document
- "Point" adds a note with an arrow pointing to a particular point in the document
- "Area" adds a note about a selected area
- "Text" adds a note about highlighted
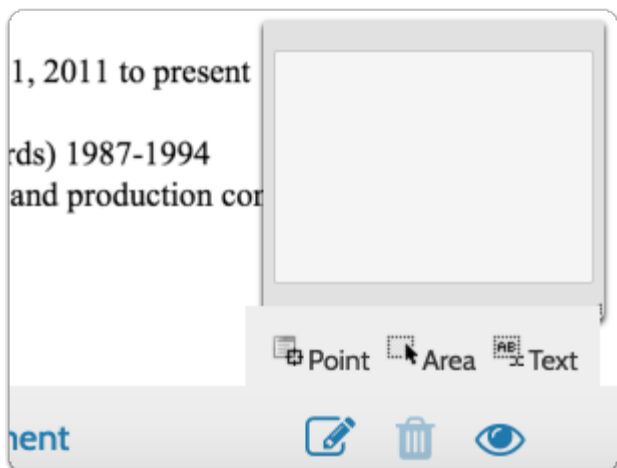
To edit a note you've added, simply click into the text field

To delete a note, click into the text field and then click the trash icon
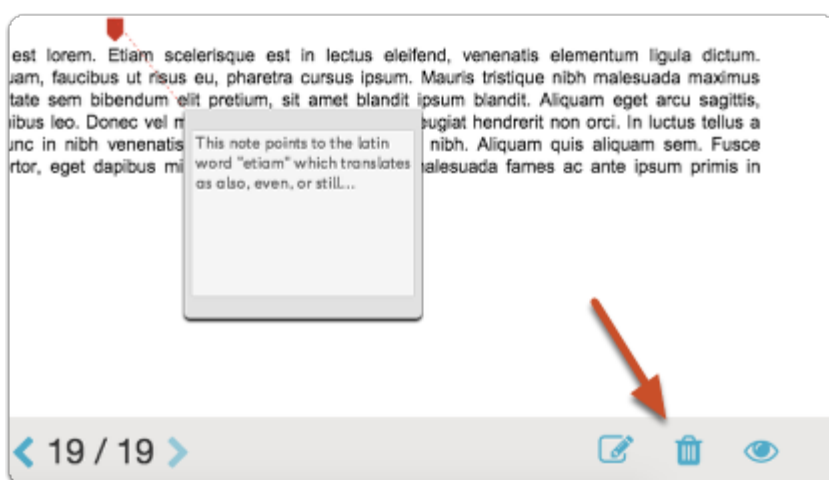
Committee voting:

Administrators and Committee Managers can record committee votes into Interfolio RPT. Committee members can view the results of a committee vote from the "Case Details" tab of the Case page.

Scroll to the bottom of the "Case Details" tab to see the results of a committee vote

> ℹ️ Voting results are represented with a circle graph displaying the overall results and the number of each vote cast.
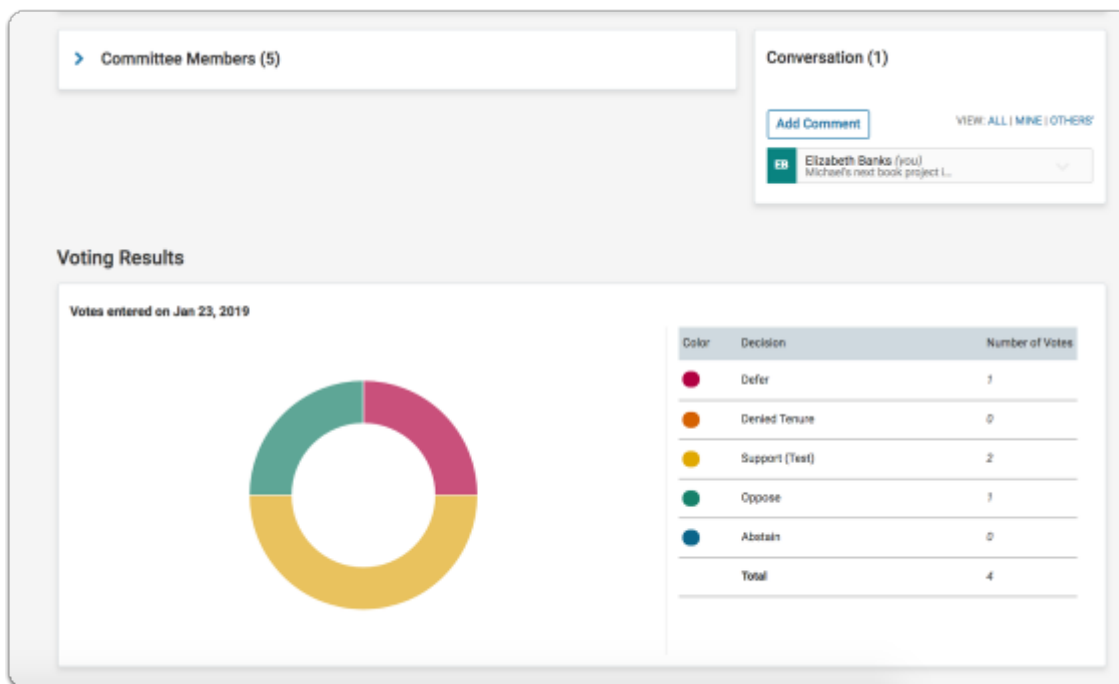
View and respond to files shared with you by your committee

Administrators or committee managers in Interfolio Review, Promotion & Tenure can share case materials with members of a committee they are managing, or other committees in the workflow of a case.

Committee members can view materials (and respond if enabled) when they log into their account.

When files are shared with you, you will receive an email message prompting you to log into your account and view the files
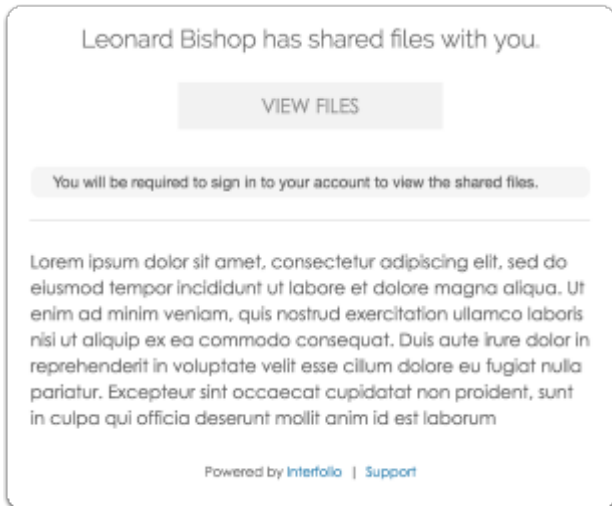
If a response is requested, you will also see that as an Action Item on your homepage along with a due date for your response. Click the link to view the file and respond
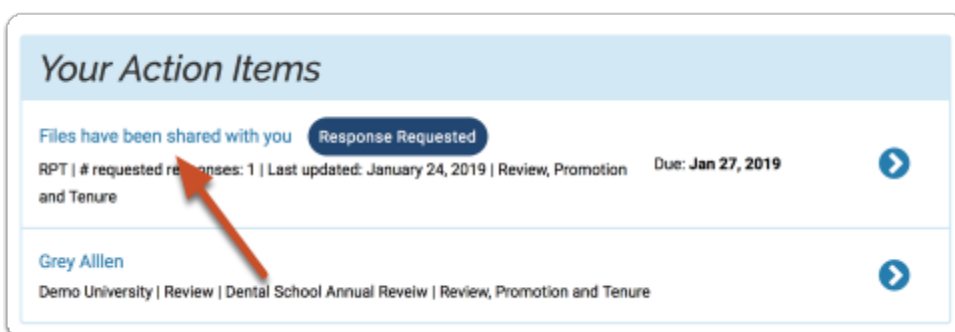
Click "View files" on the "Committee Shared Files" page

Shared files will load in the materials viewer. Read the document, and prepare your response. Click "Respond" to upload your response.
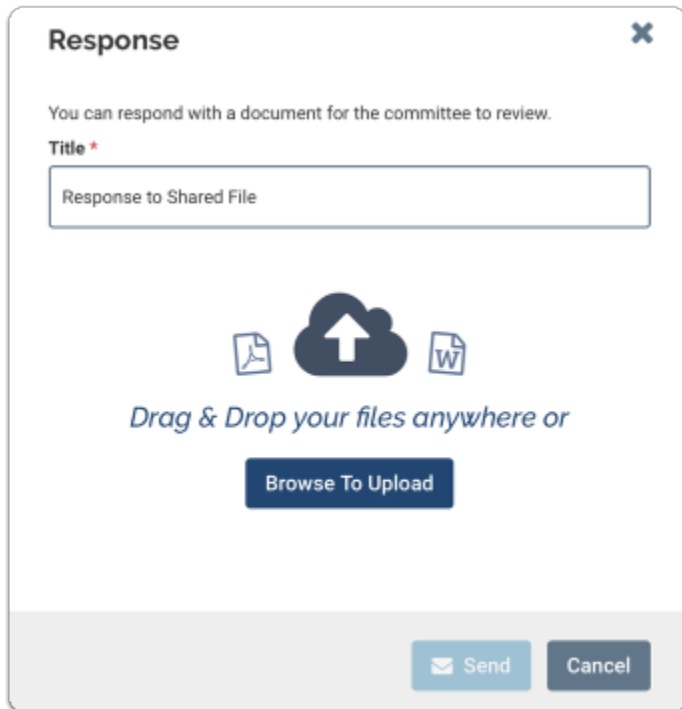
Give your response a title and browse to upload the file
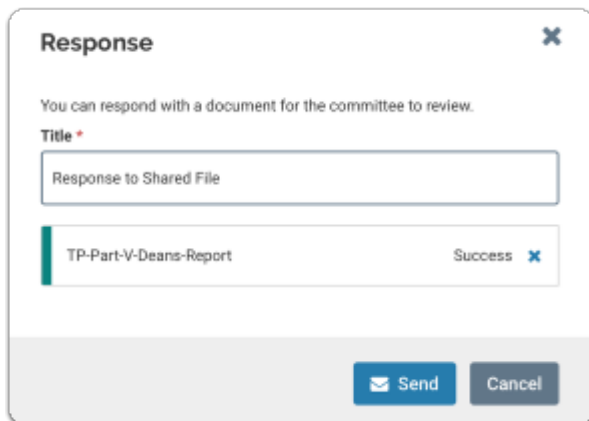
Click "Send" to send your response to the shared file