

**Administrator Guide** to *Review, Promotion and Tenure - Interfolio®*

**Appointment, Promotion and Tenure Dossier Submission and Review  
University of Colorado School of Medicine  
Updated March 2022**

The University of Colorado School of Medicine utilizes the *Interfolio Review, Promotion and Tenure* platform for submission and review of all packets for faculty appointment, promotion and tenure requests.

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## A. Interfolio Key Terms

- **Review, Promotion & Tenure (RPT):** The *Interfolio Review, Promotion & Tenure* module is used to conduct all appointment, promotion and tenure evaluations at the SOM.
- **Dossier:** The *Interfolio Dossier* module is a document archiving tool for faculty to collect, organize, prepare and store documents in one place. Faculty materials uploaded into a packet will be automatically stored in *Interfolio Dossier* for future use.
- **Packet:** The collection of required materials a faculty member submits for their RPT consideration. *Note: Historically at the SOM the packet is called a dossier.*
- **Case:** A case is a packet of all materials collected for the candidate's appointment, promotion and/or tenure review. The case includes the workflow to facilitate the RPT submission and review processes.

## **B. Interfolio Administrator Access**

Each department and/or division has at least one *Interfolio RPT* administrator user assigned in Interfolio. Interfolio administrators have access to all open cases and templates associated with their unit. Administrators have the following abilities:

- Add users
- Create a case using the applicable template
- Notify the candidate their packet is available
- Request external evaluations
- Add or modify packet documents
- Create and manage committees
- Move the case forward/backward

Any other administrative staff within the department can have access to Interfolio; however, their level of access should either be restricted at the section or division level (if that is how the department wants to manage packets), or they can be assigned access to one or more faculty members' packets to assist in their compilation.

## **C. Interfolio Faculty Access**

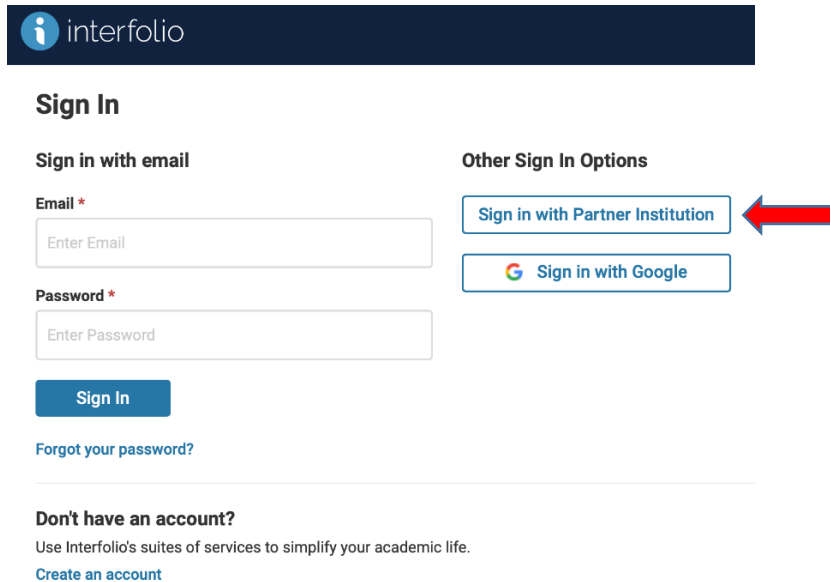
*Interfolio RPT* administrators at the department and/or division level should add all faculty that will be submitting packets in the coming year as users in the Interfolio system. Once faculty have an Interfolio user account and an active case they will be able to assemble their packet.

## D. Login to Interfolio (university and non-university)

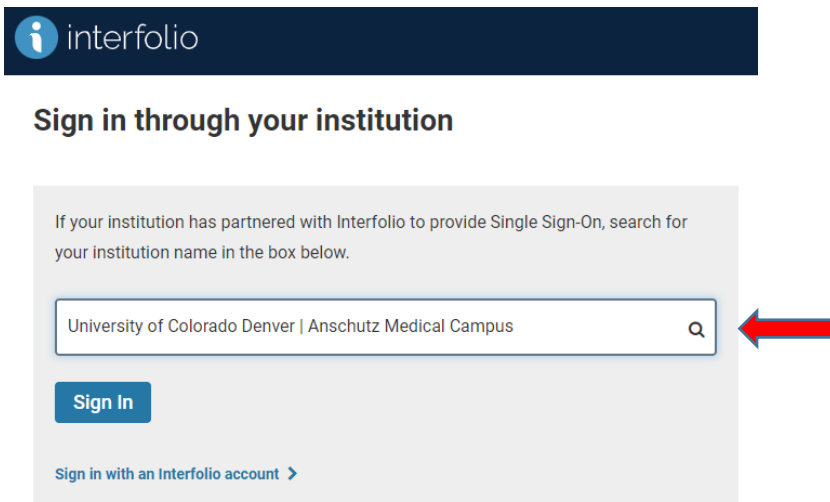
All administrative users and faculty access *Interfolio Review, Promotion and Tenure* through the Interfolio login page at <https://account.interfolio.com/login>.

### Login with university SSO (university email address required):

- Select the *Sign in with Partner Institution* button.

The image shows the Interfolio 'Sign In' page. At the top is the Interfolio logo. Below it is the 'Sign In' heading. There are two main sections: 'Sign in with email' and 'Other Sign In Options'. The 'Sign in with email' section has fields for 'Email \*' (with a placeholder 'Enter Email') and 'Password \*' (with a placeholder 'Enter Password'), followed by a 'Sign In' button and a link for 'Forgot your password?'. The 'Other Sign In Options' section contains two buttons: 'Sign in with Partner Institution' and 'Sign in with Google'. A red arrow points to the 'Sign in with Partner Institution' button. At the bottom, there is a section titled 'Don't have an account?' with a brief description and a link to 'Create an account'.

- Enter *University of Colorado Denver | Anschutz Medical Campus* in the search for institution field.
- Select the *Sign In* button, which will route you to university SSO web login.
- Enter your university login credentials and select *Sign In*.

The image shows the 'Sign in through your institution' page on Interfolio. It features the Interfolio logo at the top. Below the logo is the heading 'Sign in through your institution'. The main content area has a text prompt: 'If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.' Below this is a search box containing the text 'University of Colorado Denver | Anschutz Medical Campus' and a magnifying glass icon. A red arrow points to the search box. Below the search box is a 'Sign In' button. At the bottom, there is a link that says 'Sign in with an Interfolio account >'.

University of Colorado Denver | Anschutz Medical Campus

### First-time login with non-university email account:

Users with non-University email accounts (e.g., DHHA, NJH, VAMC) will need to login directly on the welcome screen without going through the partner institution. *Please ensure that they have already been set up as a user in the system so that they are not asked to pay for an Interfolio account.*

- Select *Forgot your password?* to setup the password for the first time.
- Enter the non-university email address and select the *Reset* button.
- Open the *Reset your Interfolio password* email and select the *Reset Password* button.
- The *Reset Your Password* form will open. Enter the new password in the *Select a Password* field and then once more in the *Enter Your New Password Again* field.
- Select the *Continue* button.
- Select the *Sign In* button from the password successfully updated message, or go to the login page at <https://account.interfolio.com/login> to login via email address and setup password.

**interfolio**

### Sign In

**Sign in with email**

Email \*

Enter Email

Password \*

Enter Password

**Sign In**

[Forgot your password?](#)

**Other Sign In Options**

[Sign in with Partner Institution](#)

[Sign in with Google](#)

**Don't have an account?**

Use Interfolio's suites of services to simplify your academic life.

[Create an account](#)

## E. Adding and Editing Users

If possible, use University email addresses when setting up new faculty users as this allows them to sign on to Interfolio with Single-sign-on (SSO). Non-university email addresses can be used for faculty that are based at one of our affiliate institutions; however, they will not use the university SSO system. Please do not invite a faculty member to begin their packet until they have been added as a user, or they will not be recognized in the system and will receive an error message.

### Adding user steps:

- Select *Users & Groups* on the left navigation bar.
- Select the *Add User* button.
- Enter first name, last name, email address, and then select the unit for which they need access.
- If you are adding a user with a non-university email address deselect the checkbox labeled *If checked, this user will need to sign on using their institutional credentials*.
- If you want to send the new user an email from the system letting them know they now have Interfolio access, leave the *Send the user a welcome message* box checked and enter a message; otherwise, uncheck the box.
- Select *Save*.

### Editing user steps:

- Select *Users & Groups* on the left navigation bar.
- Search for the user by name.
- Select the *Pencil icon* button to edit the user.
- *User Details* – To change a username, update an email address, update SSO usage or to resend the user a welcome message select *User Details*, enter your user updates, and select the *Save* button.
- *Units & Roles* – To add a unit go to *Select a unit* and from the dropdown menu choose the appropriate department or division, select *Add Unit* button. To add a department or division *Administrator* user select *Add Unit* button, select the *Change* button for the *Role in Unit*, choose *Administrator* from the role options, and close the user box to save changes.

**IMPORTANT:** *If the incorrect email address is used in the creation of a user, please correct the email address and notify [help@interfolio.com](mailto:help@interfolio.com). Let them know the correct email address, that the user has already been updated, and that the candidate will be signing in using the university SSO (unless they have an affiliate email address). The candidate will not be able to login until the email address is reconciled from the Interfolio side.*

## **F. Packet Templates**

The Office of Faculty Affairs has built templates for departments and/or divisions use to create and manage standardized packets in each of the three faculty series: Regular Faculty Series, Clinical Practice Series, and Research Professor Series. There are nine templates available for each department and/or division which are based on the faculty series and whether tenure is being requested.

### **Regular Faculty Series Templates (five templates):**

- Appointment or Promotion to Associate Professor
- Appointment or Promotion to Professor
- Appointment or Promotion to Associate Professor with tenure
- Appointment or Promotion to Professor with tenure
- Tenure Only

### **Clinical Practice Faculty Series Templates (two templates):**

- Appointment or Promotion to Associate Professor of Clinical Practice
- Appointment or Promotion to Professor of Clinical Practice

### **Research Professor Faculty Series Templates (two templates):**

- Appointment or Promotion to Associate Research Professor
- Appointment or Promotion to Research Professor

*IMPORTANT: If you choose the wrong template when inviting a faculty member to begin their packet, you cannot change the template after the fact. You will need to close the case and start over.*



## G. Managing Departmental Committees

*Interfolio RPT* is designed to move packets through a workflow utilizing *Committees*. Several different *Committees* have been initially set up in each department and/or division to function in this workflow. *Committees* can be modified, as well as added by administrators. Once the candidate has completed their packet the administrator should begin forwarding the packet through the steps below. Once the packet reaches the Dean's Office Review step the Dean's office will take over forwarding the packet through the next steps.

### **Committee placeholders set up for each department and/or division:**

1. **Department Review** - this is the first step in the workflow. This should include the administrator that will be providing overall management of this process. This person will have the ability to move packets forward, if needed, and return packets to the faculty member for revision.
2. **Department Advisory Committee**
3. **Department Chair Review**

*Note the following committees are committees set up at the School level and will be populated at that level.*

4. **Dean's Office Review** – this is the first step after the department has approved the packet. The packet will come to the Dean's Office to make sure everything is complete.
5. **FPC Subcommittee** – Initial review by Faculty Promotions Committee.
6. **Faculty Promotions Committee** – Final review by Faculty Promotions Committee.
7. **SOM Executive Committee**

## Adding and editing *Committees*:

- Select *Users & Groups* from the left navigation bar.
- The *Users, Committees & Units* page will open. Select the *Committees* tab.

University of Colorado Denver | Anschutz Medical Campus > Admin >

### Users, Committees & Units

Users **Committees** Units

Search by committee name

Sort By Name ▾

Browse By All Units ▾



- **Add Committees** – Select the *Add Committees* button. Enter the new committee *Name*. Select the *Unit* (aka department and/or division name). Select the *Save* button.

#### Add Committee

Name \*

Unit



- **Edit Committees** – Search for the committee in the *Search by committee name* field. Enter the new committee *Name*. Select the *pencil icon* to edit the committee. The edit committee window will open. The administrator can edit the committee's name, unit the committee is associated with, and add or remove committee members. Select the *Update* button once all committee changes have been made.

University of Colorado Denver | Anschutz Medical Campus > Admin >

### Users, Committees & Units


Users **Committees** Units

Search by committee name

Sort By Name ▾

Browse By All Units ▾



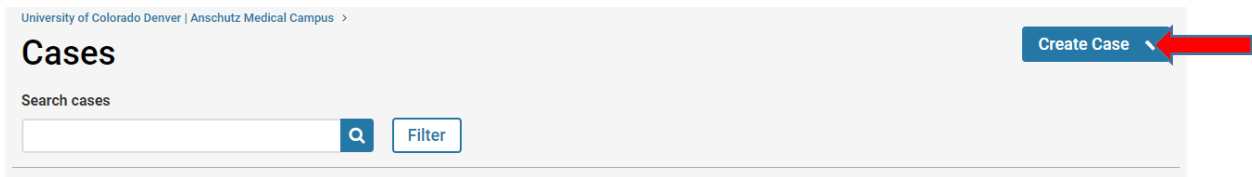
| Committee Name | Unit                                      |   |
|----------------|---|---|
| Test Committee | University of Colorado School of Medicine |  |

## H. Creating Cases

Administrators have the option to create one case at a time or multiple cases. Multiple cases can be created simultaneously, but they all need to use the same template. Note that administrators will have a lot less editing capabilities of the packets when preparing multiple cases (eg candidate requirement instructions, packet sections and case steps). Candidates should be added as users to *Interfolio RPT* under the *Users & Groups* tab before creating a case.

### Creating a single case:

- Select *Cases* on the left navigation bar.
- Select the *Create Case* button.



- An *Add New Case* pop-up will open. Add the faculty member's name in the *Search for a Candidate* field (a user account must be setup before you can start this step).
- *Will the candidate be involved in this evaluation?* – Choosing *Yes, the candidate will be involved during the case* enables the faculty member to manage assembling their packet. They will be able to upload, move around and delete documents they've added to the packet. Choosing *No* enables the administrator to manage all aspects of assembling the packet, while the faculty member will not be able to.

*IMPORTANT: If the administrator adds the documents for the faculty member, the system will not trigger the "submission" process and the forward buttons will remain inactive. To bypass this step, check the box beside the candidate's name on the Case List page and use the Send Forward option on the tool bar.*

- Choose the organizational unit (aka department and/or division) for the case by selecting from the *Unit for Case* dropdown.
- Select *Confirm*.

## Add New Case



Search for a Candidate \*

Selected Candidate \*

The candidate information will display here once they are selected.

Will the candidate be involved in this evaluation? \*

This setting cannot be changed after this step. [Learn more about candidate involvement.](#)

- ☐ Yes, the candidate will be involved during the case.
- ☐ No

Unit for Case \*

Please select an organizational unit for this case.

[Confirm](#) [Cancel](#)

- **Select a Template** – Choose the appropriate template for the new case by clicking on the template name. You can *Preview* the template by clicking on *Preview* next to the template name you want to view.
- The *Case Information* page will open. Select *Answer* in the *Case Data Forms* section.

University of Colorado Denver | Anschutz Medical Campus > Cases > Gregory House >

## Case Information

Type \*

### Candidate Information

Candidate

GH

Gregory House  
scolton12@hotmail.com

Will the candidate be involved in this evaluation?

Yes, the candidate will be involved during their case.

#### Creating a Case

- 1 Case Information
- 2 Candidate Requirements
- 3 Internal Case Sections
- 4 Case Review Steps
- 5 Case Summary

### Case Data Forms

Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the [Administration](#) page.

☐ Dossier Submission Form - Reg Fac - Assist to Assoc 0/ 8 questions answered [Answer](#)

[Add Case Data Form](#)

[Save & Continue](#)

[Return to Case Summary](#)

- Complete the *Case Data Form* and select the *Save* button.
- Select *Save & Continue* in *Case Information*.
- The *Candidate Requirements* page will open.
- Include a due date on the packet in the *Candidate's Packet Due* field, if you wish, but that is not required.

## Candidate Requirements

### Candidate's Packet Due

Mmm d, yyyy



- **Instructions to Candidate** - Modify basic instructions to the candidate as necessary (e.g., choose the rank and whether tenure will be included, and add in additional department-specific information as necessary), but leave the prepopulated links to the Dossier Building Guide, the Dossier Checklist, as well as a link to the Faculty Affairs Promotion and Tenure webpage.

#### Instructions To Candidate

Customize instructions to the candidate about assembling their packet and any other procedures, policies, or deadlines at your institution. You can also include links to required forms and online resources such as instructions or handbooks outlining your policies.

Dear Faculty Member,

You can begin compiling your dossier for promotion to [Associate Professor or Professor] [with tenure]. Please submit your dossier for review by your department by \_\_\_\_\_ [Dept add add] information, if needed.]

If you wish to review the letters from your department evaluation committee or department chair, they will be available once they have been uploaded by your department into your Interfolio dossier. Please ask your Department Chair, Division Head or Department Administrator if you wish to see a copy of these letters. Letters from referees outside your home department and letters from external referee letters are confidential and not available for review at any point in the promotion or tenure review process.

Below is a list (with links) of documents that can help as you compile your dossier:

body p

- **Packet Requirements** – All packet sections including document requirements have been preset in each template.
- Select the *Continue* button.
- The *Internal Case Sections* page will open.
- Choose *Above the candidate packet* in the *Settings*.

## Internal Case Sections

Create sections to help committee members or individual users organize the materials they add as part of the review. The sections you create here will not be visible to the candidate. You can set up specific requirements for the reviewers of the case in the Case Review Steps. For Examples or more guidance, see [Required Documents for Review Steps](#).

### Settings

Internal case sections will appear:

☒ Above the candidate packet

☐ Below the candidate packet

- Select the *Continue* button.
- The *Case Review Steps* page will open. The *Case Review Steps* are prepopulated, but administrators should review each step to make sure the right people/committees are assigned to the steps prior to the Dean's Office Review step.
- Edit workflow *Case Review Steps* as necessary. Select the *Add Step* button to add a step. Select the *Additional Options* button and select *Reorder* to rearrange step order. Select *Edit* on a step to make changes, such as adding a committee (*Add Committee* button) or managing members (*Add Member* button).

University of Colorado Denver | Anschutz Medical Campus > Cases > Gregory House >

## Case Review Steps

[+ Add Step](#) [Additional Options ▾](#)

1 Department Review [Edit](#) | [Delete](#)

Department Review (1)

☐ No Instructions
 ☐ No Required Documents
 ☐ No Required Forms

2 Department Advisory Committee [Edit](#) | [Delete](#)

Department Advisory Committee (1)

☐ No Instructions
 ☐ No Required Documents
 ☐ No Required Forms

- Select the *Continue* button.
- The *Case Summary* page will open.
- Select the *Return to Case* button, which will take you to the new case you just created.
- Select the *Send Case* dropdown button. This is the button administrators use to move the packet forward and backward between the *Review Case Steps*. Choose *Candidate/Notify Candidate* from the dropdown to send the packet to the faculty member to begin assembling their packet.

### Creating multiple cases:

- Select *Cases* on the left navigation bar.
- Select the *Create Case* dropdown button and choose *Create multiple cases*.

University of Colorado Denver | Anschutz Medical Campus >

## Cases

[Create Case ▾](#)

Search cases

[Filter](#)

- The *Case Setup* page will open.
- Choose the organizational unit (aka department and/or division) for the cases from the *In which unit would you like to create your cases?* field.
- Choose either *Promotion* (promotion and appointment cases) or *Tenure* (case includes tenure) from the *What type of cases are you creating?* dropdown.
- Choose the appropriate template for the new cases by clicking on the *Select* button from the *Select the template for the cases* section. You can *Preview* the template by clicking on *Preview* next to the template name you want to view.
- Select the *Continue* button.

## 1. Case Setup

You can create multiple cases at once. Please make sure you are creating your cases based on a template that has the correct information, because you will not be able to make changes to the template during this process.

In which unit would you like to create your cases? \*

Test Department

What type of cases are you creating?

Promotion

### Select the template for the cases

Search cases



Promotion | Regular Faculty Series - Appointment or Promotion to Associate Professor (Edited 2022)

Test Department

Template for appointment or promotion to Associate Professor in the Regular Faculty Series.

Preview

Select

- The Select *Candidate* page will open.
- Choose whether the candidate will submit their own packet materials (*Yes*), or if the administrator will only manage packet documents (*No*).
- Add the names of the faculty cases are being created for by selecting the *Add Candidates* button.

## 2. Select Candidates

Will the candidate submit their packet?

Choose "Yes" if the candidate will submit materials online through Interfolio. This setting can not be changed after the case has been created.

☒ Yes

☐ No

### Add 1 or more candidates

+ Add Candidates

Continue



Previous

Cancel

- Search for the candidates by name, email or unit. Select the *Add* button when you've identified a candidate. Add all the candidates you want to create a case for and then select the *Done* button.

## Add Candidates

Search by name, email or unit

Show

1 of 3 added | [Add remaining 2 on this page](#)

| Name  | Units   | Actions                |
|---|---|------------------------|
| Ashley Woodhouse<br>ashley.woodhouse@cuanschutz.edu | Department of Obstetrics and Gynecology                 | <a href="#">+ Add</a>  |
| Gregory House<br>scolton12@hotmail.com              | University of Colorado Denver   Anschutz Medical Campus | <a href="#">Remove</a> |
| Grace Houser<br>grace.houser@cuanschutz.edu         | Peds-Pulmonary  | <a href="#">+ Add</a>  |

Done

- Confirm all the candidates have been added and select the *Continue* button.
- The Summary & Confirmation page will open.
- Enter *Due Dates* if applicable.
- Select *Yes* or *No* to notify the candidates now. If *No* is selected the administrator can forward the case to the candidate at another time by opening the case. Select the *Send Case* dropdown button. This is the button administrators use to move the packet forward and backward between the *Review Case Steps*. Choose *Candidate/Notify Candidate* from the dropdown to send the packet to the faculty member to begin assembling their packet.
- Select the *Create Cases* button.

## Candidates

NOTE: Candidates will submit materials online through Interfolio.

☐ 1 class="h2 font-paragraph-header font-weight-medium text-overflow push-right-xs"> 2 Cases will be created

| Name                                   | Units   | Details | Actions                |
|--|---|---------|------------------------|
| Gregory House<br>scolton12@hotmail.com | University of Colorado Denver   Anschutz Medical Campus | —       | <a href="#">Remove</a> |
| Rudy Welch<br>welchcheryl@comcast.net  | University of Colorado Denver   Anschutz Medical Campus | —       | <a href="#">Remove</a> |

## Notify Candidates

Would you like to notify the candidates now?

- ☐ Yes  
☒ No

Create 2 Cases

Previous

Cancel



## **I. Managing Packet Workflow**

Once faculty have been invited to begin their *Interfolio RPT* packet, they will be added to the administrator's Dashboard so progress can be monitored. The administrator will be notified when a packet has been submitted for review by the faculty member, as well as when it moves forward. The status will automatically update on the administrator's Dashboard as well.

## J. Requesting Letters of Reference

Administrators can request letters of reference, both internal and external, for faculty in one of two ways via *Interfolio RPT*:

### Option 1:

- Select the *Request Evaluation* button in the *External Evaluations* section in the *Internal Sections* of the packet.



- Add the evaluators details including name and email address. More than one evaluator can be added by selecting the Add Another Evaluator button. Prepare the message, sender, and reply contact details.

University of Colorado Denver | Anschutz Medical Campus > Cases > New Candidate >

### Request External Evaluation

External Evaluator Information

|   |  |  |
|---|--|--|
| First Name *                            | Last Name *                            | Email Address *                            |
| <input type="text" value="First Name"/> | <input type="text" value="Last Name"/> | <input type="text" value="Email Address"/> |

[+ Add Another Evaluator](#)


**Message to Evaluator**

Use this message to request an evaluation of the candidate. Your request can include a personal message to the evaluator and documents to aid the evaluator in their review. Once completed, evaluators submit their reviews through Interfolio's secure delivery system.

|  |  |
|--|--|
| <b>From Name</b>   | <b>Reply-to</b>  |
| <input type="text" value="University of Colorado Denver   Anschutz Medical Campus"/> | <input type="text" value="susannah.mcguire@cuanschutz.edu"/> |

**Subject**

**Message**

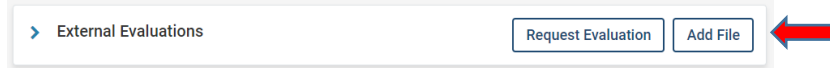


[Preview Email](#)

- Add the evaluation due date in the *Deadline* field. Choose *Yes, allow the evaluator to submit additional files* so they can attach their CV. Make sure *Administrators & Entire Committee* is selected in the *Access* field.
- Review all the evaluator selections and entries. Once ready select the *Send Request* button.

### Option 2:

- The second way to request external and internal Reference Letters is to request them outside of the system (whatever the administrators process has been in the past) and add them to the packet by selecting *Add File* in the *External Evaluations* section.

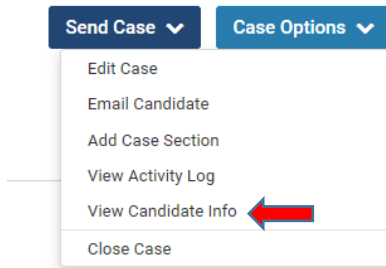


*IMPORTANT: All external and internal reference letters must remain confidential and cannot be viewed by the faculty member. By including them in the External Evaluations section, they are not viewable by the faculty member.*

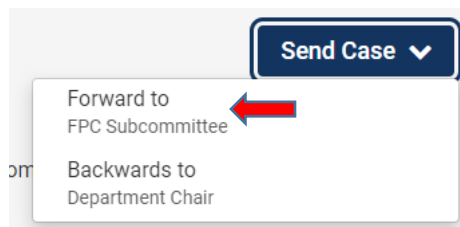
## K. Managing Completed Packets

Once a faculty member has completed their packet and they submit it to the department, the Administrator should review the packet for completeness.

- Open the *Case* to review.
- Select the *Case Options* dropdown and select *View Candidate Info*. If the *Candidate Info* form isn't complete select the *Edit Responses* button, complete the form and select the *Save* button.



- After confirming all the required documents are included in the packet and letters have been reviewed select the *Send Case* button dropdown and select *Forward to Department Advisory Committee* to move the packet to the next step in the workflow.



- Once a packet has been forwarded to the Department Advisory Committee, individuals on that committee will be notified by email, and the packet will then be visible in their Dashboard. When committee members click on the Case, they can review the contents of the packet. Department Advisory Committee Members and the chair can either read the packet on the screen by clicking on *Read Case* at the top of the packet or download it in PDF. If they download the packet, an email will be sent to them with the link to the PDF.
- The Department Advisory Committee and chair should upload their letters to the *Committee Documents* section of the packet by selecting the *Add File* button.



- Committee members can also communicate with other committee members either through the comments section, or by email. Click on *Case Details* to access these functions.

[Case Materials](#)
[Case Details](#)

Reviewing as  
 Dean's Office Review

▼ Committee Members (2)
 

Email

Edit

| Name             | Email                           | Role    |
|------------------|---------------------------------|---------|
| Cheryl Welch     | cheryl.welch@cuanschutz.edu     | Manager |
| Susannah McGuire | susannah.mcguire@cuanschutz.edu | Manager |

Conversation (0)
 [Turn Off Comments](#)

No Comments Yet

Add Comment

- Once the packet has been reviewed by the Department Advisory Committee, chair, and the appropriate letters have been added, select *Send Case* and move the packet to *Dean's Office Review*. Once the administrator moves the packet forward to the Dean's Office, it is only viewable at the department level by department *Interfolio RPT* administrators. If there are issues identified at the Dean's Office, the department will be notified. The status button in the upper right will be changed by the Dean's Office as needed.

## **L. Questions and Troubleshooting Problems**

If you have specific questions regarding anything contained in this guide, or you run into questions or problems as you begin to set up your committees or invite faculty to begin their packets, don't hesitate to contact either Cheryl Welch ([Cheryl.Welch@cuanschultz.edu](mailto:Cheryl.Welch@cuanschultz.edu); 303-724-5356) or Susannah McGuire ([Susannah.McGuire@cuanschultz.edu](mailto:Susannah.McGuire@cuanschultz.edu); 303-724-5357).

If an issue requires technical assistance from Interfolio, they can be reached directly at: [help@interfolio.com](mailto:help@interfolio.com) or (877)997-8807 Monday-Friday 9-6pm Eastern Time.