

University of Colorado School of Medicine
Appointment, Promotion and Tenure Packet Submission and Review
Administrator
***Interfolio Review, Promotion and Tenure*[®] User Guide and Information**
Updated September 2020

The University of Colorado School of Medicine now utilizes the *Interfolio Review, Promotion and Tenure* platform for submission and review of all packets for faculty appointment, promotion and tenure requests. The system has been set up with templates to build packets in each of the three faculty series: Regular Faculty Series, Clinical Practice Series, and Research Professor Series. The system is designed to move packets through a workflow utilizing “Committees.” Several different committees have been initially set up in each department to function in this workflow, and instructions on how to modify those committees, as well as add additional committees, can be found in this document.

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A. Access and Logging in to System

1. Administrative Access - Each department has at least one administrator assigned who will have access to the highest department level within the system, with the ability to move packets forward, return them to faculty for revisions, and create committees. Any other administrative staff within the department can have access to the system; 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.

2. Faculty Access - Interfolio Review, Promotion and Tenure administrators at the department level should add all faculty that will be submitting packets in the coming year as users in the system. If possible, please use University email addresses for all faculty as this allows them to sign on through the Single-Sign-On system. For faculty that don't use University email accounts that are based at DHHA, NJH, VAMC, or any other affiliate institutions, they can use their non-University email account; however, they will then have to create an Interfolio account and create a password and will not pass through the University's Single-Sign-On 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.

3. Adding Users- To add users into the system, click on "**Users & Groups**" on the left navigation bar. Click "**Add User.**" You will then enter their first name, last name, email address, and then select the unit for which they need access. Note 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 them an email from the system letting them know they now have access, leave the "**Send the new user a welcome message**" box checked and type a message; otherwise, uncheck that box and select "**Save**". Note if you are adding a department or division administrative user follow the directions above, then click on the edit pencil for the individual user account, select the "**Units**" tab, click on "**Change**" for the "**Role in Unit**", and select "**Administrator**".

IMPORTANT: If the incorrect email address is used in the creation of a user, please correct the email and notify 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. You can also contact Faculty Affairs and we can contact Interfolio for you to make the correction.

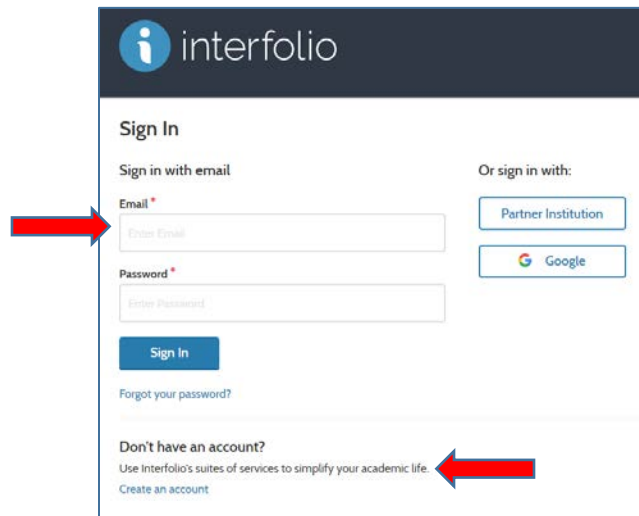
4. Logging in to Interfolio Review, Promotion and Tenure - All administrative users and faculty will access *Interfolio Review, Promotion and Tenure* through the Interfolio log-in page. The URL for Interfolio is: <https://account.interfolio.com/login>.

Users with University Email Accounts – Users with University email accounts will access the system using their University log-in.



Click on **“Sign in with Partner Institution”** (DON’T click on the **“Sign In”** button yet!) and then choose **“University of Colorado Denver | Anschutz Medical Campus”** from the dropdown list, and click **“Sign In.”** This will take you to the SOM Portal, where you will provide your University sign-in information.

Users with Non-University Email Accounts – Users with non-University email accounts (e.g., DHHA, NJH, VAMC) will need to create an Interfolio account and log in 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.*



Click **“Cases”** to access the system.

B. Packet Templates

There are nine templates available for each department which are based on the faculty series and whether tenure is being requested. The number of templates was expanded to provide better clarity on which action was 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

Departments can add additional templates at their discretion, but you should duplicate additional templates from those provided so that the proper format is used (e.g., don't "start from scratch").

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.

C. Creating Cases

To create a packet case, select "**Cases**" from the navigation, then click on "**Create Case**" at the top of the page:



You will have the option of creating one case at a time or multiple cases (click on the down arrow to create multiple cases). Note that all candidates should be added as users to *Interfolio Review, Promotion and Tenure* under the "**Users & Groups**" tab before using the multiple case creation feature. In addition, all case steps and committees need to be added to the department case templates before using this feature.

Steps to Follow:

1. Click on your department/division, then "**Confirm.**"
2. Choose appropriate template.
3. Choose the type of packet that will be submitted from the dropdown list, and then add the faculty member's name and email address. Leave the "**Yes**" button checked for "**Will the candidate be involved in this evaluation?.**" Click "**Continue.**"
4. Include a due date on the packet, if you wish, but that is not required. 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 please 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. Packet requirements including CV Abstract, CV, etc., are now visible. Click "**Continue.**"
5. Edit workflow case review steps as necessary. Click "**Continue.**"

6. Click “**Send Case,**” and then “**Notify the Candidate,**” which will send an email to the faculty member, inviting them to begin working on their packet.

D. Managing Departmental Committees


The following committee placeholders were set up for each department:

1. **Department Review** - this is the first step in the workflow. This should be 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**

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. **Executive Committee**

You can add individuals to these Departmental Committees by clicking on **"Users & Groups"** from the left navigation bar.

To Create a committee, click on **"Committees"** and then . Name the committee, select the unit, then click **"Save."** You will then select committee members from a list of users in your unit.

Note: You can add individual administrative staff to a faculty member's packet workflow to assist in the compilation of the packet; however, *caution*:

- If a department administrator uploads documents on behalf of a candidate, the faculty member will not be able to see any documents that were added by the staff member.
- In addition, if the staff member 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.

E. Managing Packet Workflow

Once faculty have been invited to begin their packet, they will be added to your Dashboard so you can monitor their progress. You will be notified when a packet has been submitted for review by the faculty member, as well as when it moves forward. The **"Step"** status will change on your Dashboard as well.

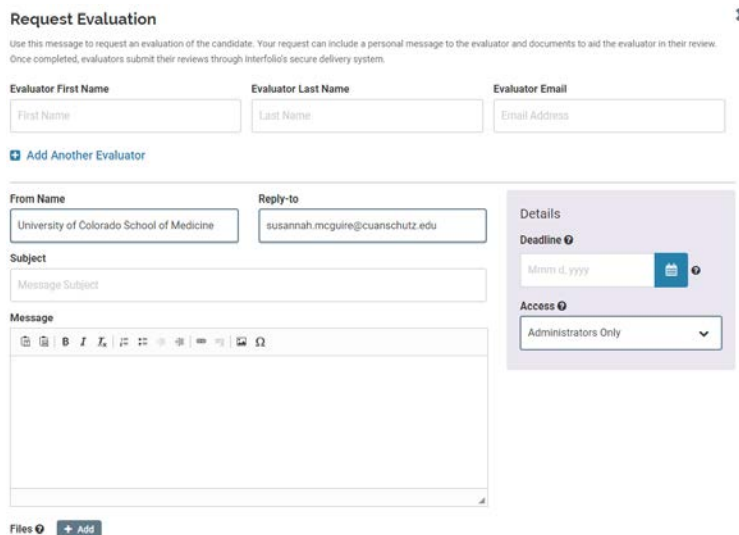
F. Requesting Letters of Reference

You can request letters of reference, both internal and external, for faculty in one of two ways:

1. Click on the “**Request Evaluation**” button in the “**External Evaluations**” section in the “**Internal Sections**” packet.



You can then identify the individuals to receive the requests, as well as provide a message and add documents for the individual to review (e.g., faculty member’s CV, SOM promotion criteria, etc.) If you choose to include additional documents for the individual to review, you must add a section to the packet and upload those documents. That will allow you to add them to the request.

A screenshot of a 'Request Evaluation' form. At the top, it says 'Request Evaluation' with a close button (X). Below that is a small instruction: '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.' The form has three input fields: 'Evaluator First Name' (with placeholder 'First Name'), 'Evaluator Last Name' (with placeholder 'Last Name'), and 'Evaluator Email' (with placeholder 'Email Address'). Below these is a button 'Add Another Evaluator'. The form is divided into sections: 'From Name' (University of Colorado School of Medicine), 'Reply-to' (susannah.mcguire@cuanschutz.edu), 'Subject' (Message Subject), and 'Message' (a rich text editor). On the right side, there is a 'Details' panel with 'Deadline' (Month d, yyyy) and 'Access' (Administrators Only). At the bottom left, there is a 'Files' section with an 'Add' button.

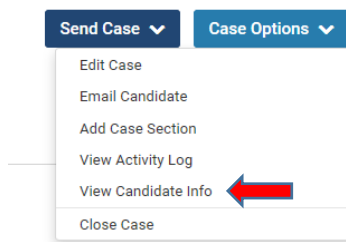
2. **Request Reference Letters Outside of System.** The second way to request Reference Letters is to request them outside of the system (whatever your process has been in the past) and add them to the packet by clicking on “**Add File**” on the External Evaluations section. **IMPORTANT:** If the letters are added to this section, the faculty member does not have access to the letters.



Important: All external reference letters (outside of faculty member’s department) are 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.

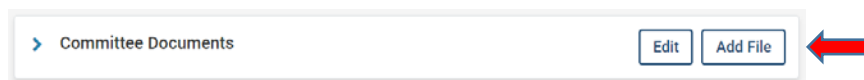
G. Managing Completed Packets

1. **Administrator Review of Packet.** Once a faculty member has completed their packet and they submit it to the department, the Administrator should review the packet for completeness. Each packet will have a **Case Data Form** attached to it, which you should complete before forwarding on to the next step, if it wasn’t already completed at the beginning of the process. The form includes basic information about their current rank, proposed rank, and whether they are requesting tenure. The form can be found by selecting the packet, then clicking on **“Case Options”** then **“View Candidate Info.”** Click on **“Edit Responses”** and complete form.



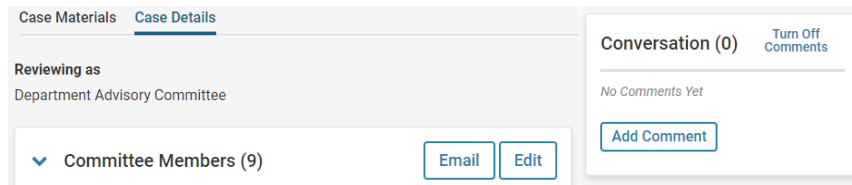
2. Click on **“Send Case”** to move the packet to the next step in the workflow.

3. **Department Advisory Committee and Chair Review of Packet.** Once a packet has been forwarded to the Department Advisory Committee, individuals on that committee will be notified, and the packet will then be visible in their Dashboard. When they click on the packet, they will see the contents of the packet, including Reference Letters. A new section will also appear in the packet at this time, **“Committee Documents,”** which is where the Department Advisory Committee and the Department Chair letters will be uploaded:



Department Advisory Committee Members and the Department Chair can either read the packet on the screen by clicking on **“Read”** at the top or download the dossier into a PDF. If they download the packet, an email will be sent to them with the link to the PDF, or they can retrieve it by clicking on the notification **“bell”** at the top right of the screen.

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.



4. **Packet Submission to Dean’s Office.** Once the packet has been reviewed by the Department Advisory Committee, chair, and the appropriate letters have been added, click on “**Send Case**” to move the packet to the Dean’s Office. Once the Administrator moves the packet forward to the Dean’s Office, it is only viewable at the department level by department *Interfolio Review, Promotion and Tenure* 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.

H. 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@cuanschutz.edu; 303-724-5356) or Susannah McGuire (Susannah.McGuire@cuanschutz.edu; 303-724-5357). If an issue requires technical assistance from Interfolio, they can be reached directly at: help@interfolio.com or (877)997-8807 Monday-Friday 9-6pm Eastern Time.