# Faculty Member 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 dossiers for faculty appointment, promotion and tenure requests.

# Table of Contents


A. Interfolio Key Terms..... 3

B. Faculty Access..... 4

C. Login to Interfolio (university and non-university) ..... 4-5

D. Packet Templates..... 6

E. Your Packet or *Interfolio Dossier*? ..... 7-8

F. Building Your Packet..... 9-10

G. Packet Submission..... 11

H. Letters of Reference..... 12

I. Dossier Review and Approval..... 12

J. Questions and Troubleshooting Problems ..... 12

## 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.*

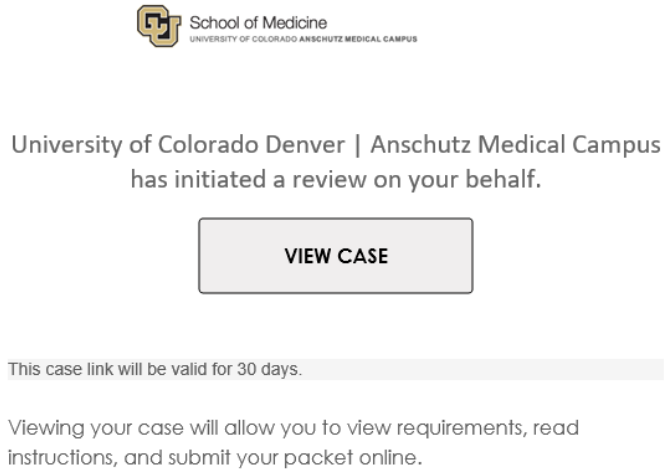
- **Case:** A case is a packet of all materials collected for the candidate's appointment, promotion and/or tenure review. The case includes the workflow to facilitate the RPT submission and review processes.

## B. Interfolio Faculty Access

All faculty completing appointment, promotion and tenure award packets will be given access to *Interfolio RPT* and will be invited to begin compiling their packets.

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

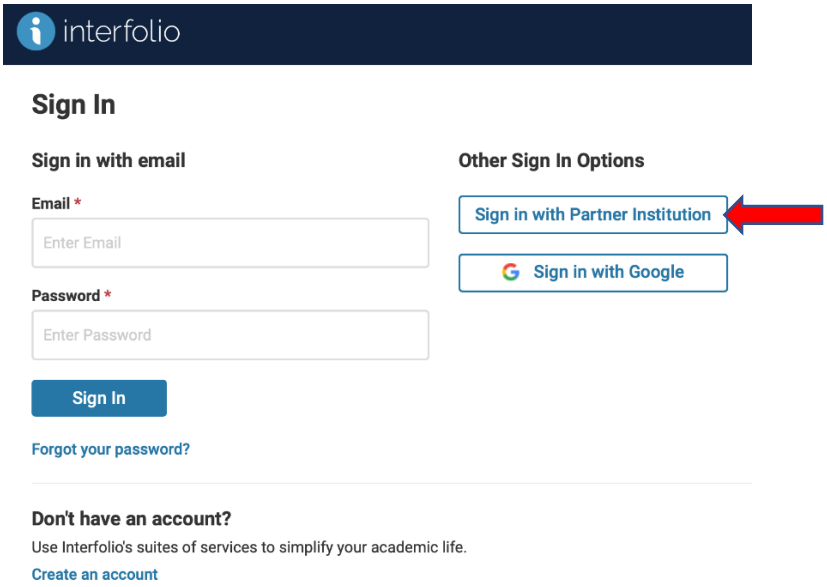
Faculty members access *Interfolio RPT* through the Interfolio login page at https://account.interfolio.com/login. The department and/or division administrator will send new faculty users an invitation email to begin compiling their packet.



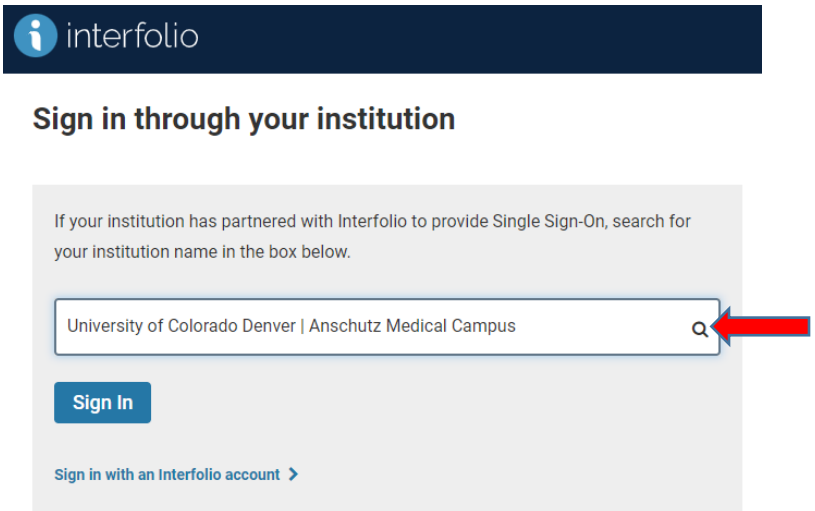

There are two ways to login to *Interfolio RPT* depending on the email address used to setup the faculty user account: login with university SSO (university email) or login with non-university email and password.

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

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



- 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 university login credentials and select *Sign In*.




**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.

- 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.

## D. 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. The department and/or division in consultation with the faculty member will decide which template to use. There are nine templates available based on the faculty series and whether tenure is being requested. The faculty member will be sent a request to begin compiling their packet from one of the templates listed below:

**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

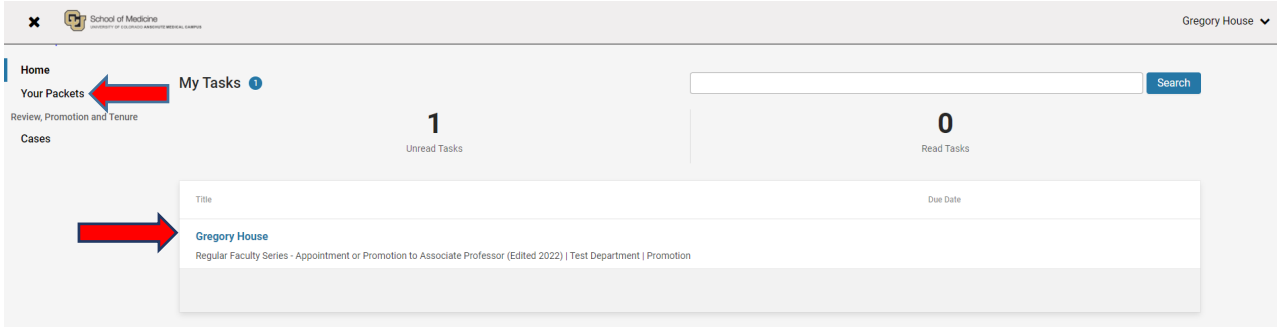
**Research Professor Faculty Series Templates (two templates):**

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

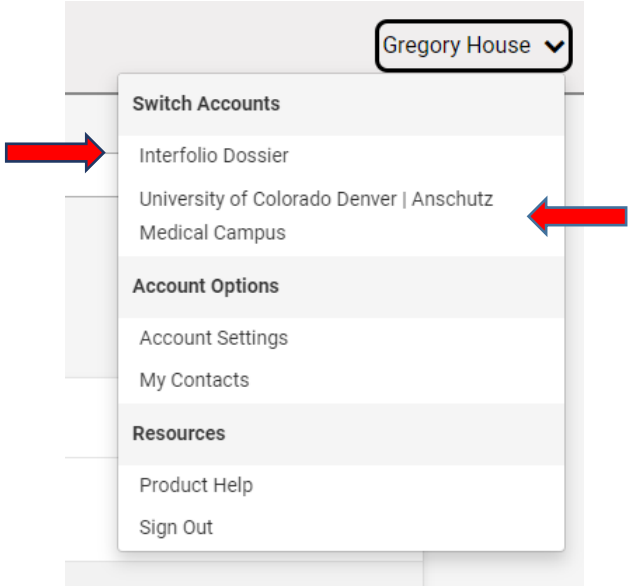
## E. Packet or *Interfolio Dossier*?

Faculty have a couple options to add materials in Interfolio: uploading documents directly to *Your Packet* or uploading and storing materials in *Interfolio Dossier* and adding them later to *Your Packet*. *Interfolio Dossier* offers faculty the ability to compile and store their documents ahead of putting together their packet, an electronic filing cabinet. Faculty interested in assembling their packet immediately can upload documents directly into *Your Packet*.

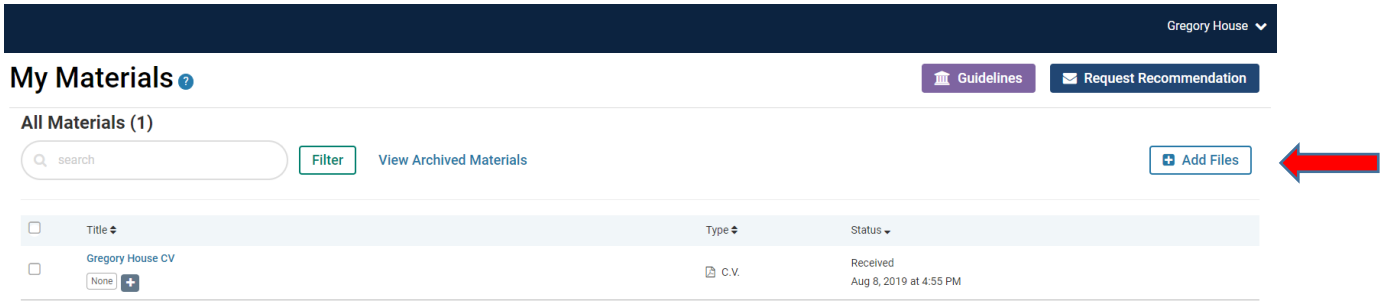
- When logged in to Interfolio the Home page will open.
- Select *Your Packet* from the navigation on the left of the screen or click on the packet name listed under *My Tasks* to access the packet.



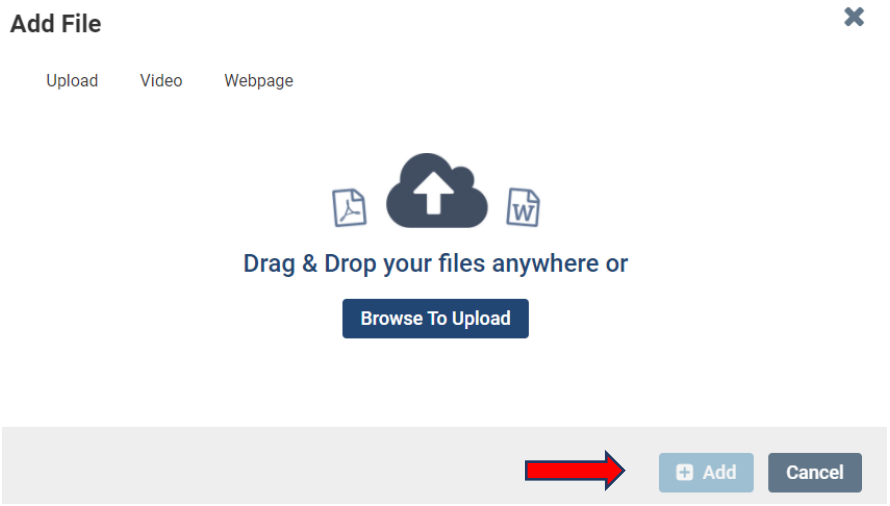

- To switch between *Interfolio RPT* (where the faculty packet resides) and *Interfolio Dossier* go to the username in the upper right of the screen and select the dropdown.




- Select *Interfolio Dossier* to add materials for future use, or select *University of Colorado Denver | Anschutz Medical Campus* to access the packet in *Interfolio RPT*.
- When in *Interfolio Dossier* select the *Materials* option on the left navigation to compile documents.




- Select the *Add Files* button to add documents, videos and webpages.

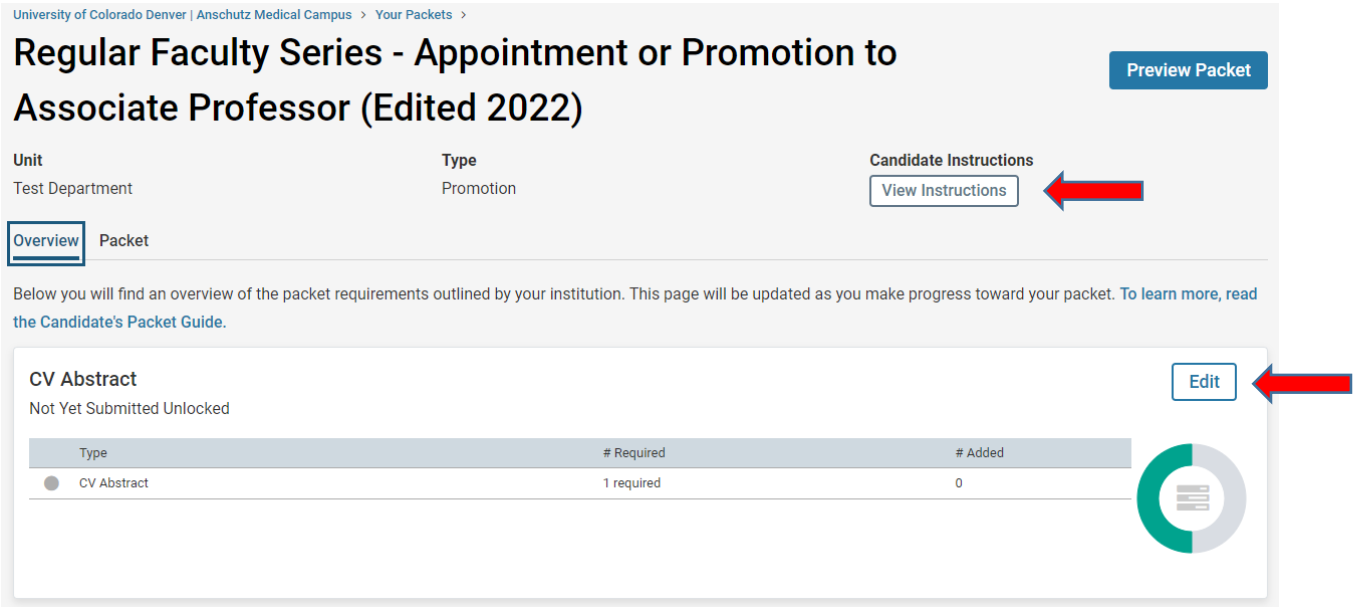



- Drag and drop or browse to upload files. Select the *Add* button and the files will be added to *My Materials*

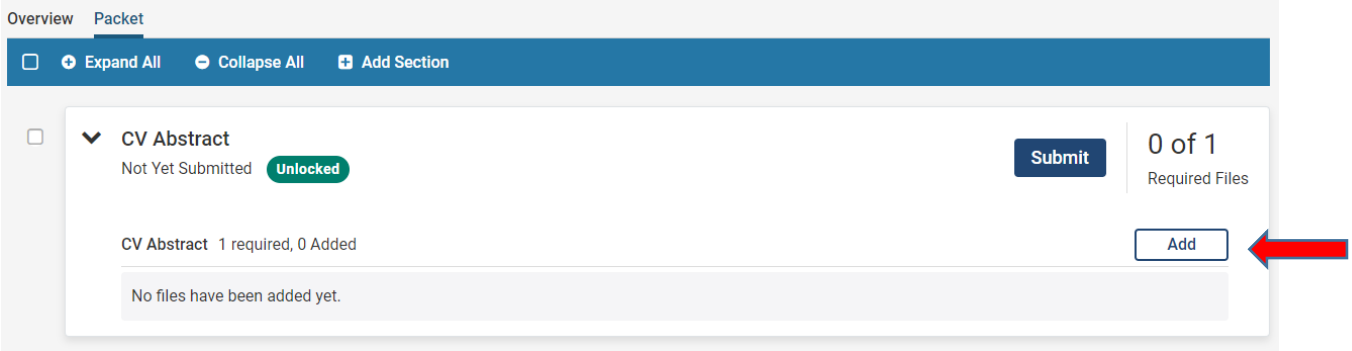
## F. Building Your Packet

Once the faculty member has been invited to begin compiling their packet, they can start and stop at any time. The packet template includes the sections that are relevant to the series in which you are seeking appointment or promotion (Regular Faculty Series, Research Professor Series, Clinical Practice Series). There are specific directions on the portfolio sections to indicate estimated page length and other information.

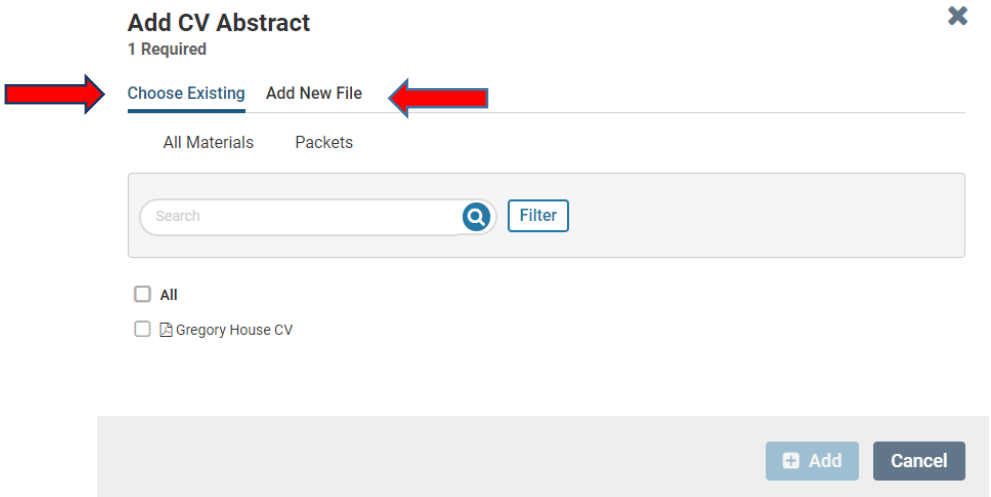
- Open *Your Packet*.
- Select *the View Instructions* button to view the initial instructions regarding building your packet, along with links to helpful web pages and documents.




- Select *Edit* next to any of the packet sections to begin adding materials.
- Add individual documents to the packet section by selecting the *Add* button.



- There are two ways to add documents to a packet section: *Choose Existing* or *Add New File*. If documents have been added in *Interfolio Dossier* they will be available under the *Choose Existing* tab. If documents need to be added directly to the packet section, choose *Add New File*.

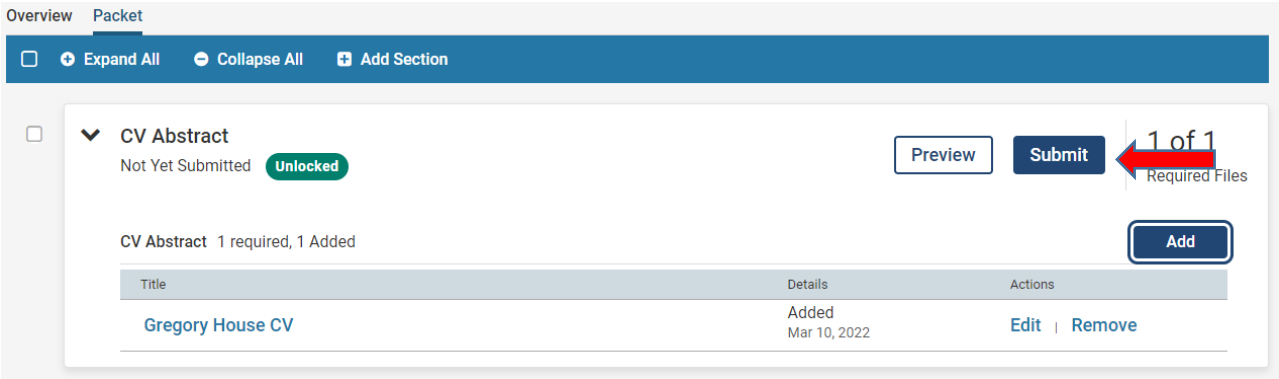



- Select the *Add* button once existing documents are selected or new documents have been uploaded.
- Repeat for each packet section.

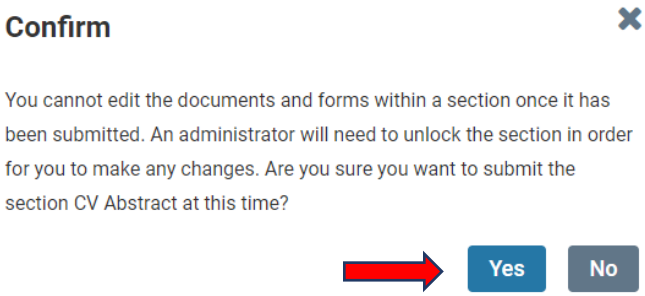
## G. Packet Submission

Packet sections can be submitted as they are completed or submitted all at once when the entire packet is complete. The packet will be routed to the department and/or division administrator that is responsible for organizing the workflow of packets for review.

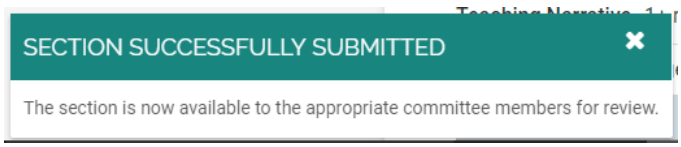
- Once a packet section is ready for submission, open the packet section (select *Edit* if in the packet Overview) and select the *Submit* button.




- A message will appear confirming submission of the packet section documents, select the *Yes* button.




- A submission confirmation message will pop-up.




*IMPORTANT: Once a dossier section is submitted it will be locked so you'll no longer be able to make edits. If for some reason you want to edit a section you've submitted contact your department and/or division administrator to unlock the section.*

## H. Letters of Reference

The *Interfolio RPT* platform allows for Letters of Reference to be requested directly through the system (when they are submitted by referee, they are automatically added to the dossier), or they can be requested outside of *Interfolio RTP* and added into the packet by the department and/or division administrator. These letters should not be requested by the faculty members themselves; the department will request these letters.

*IMPORTANT: Faculty members will not have access to Letters of Reference – they are only viewable in the packet by individuals or committees that will evaluate the packet after it has been submitted by the faculty member (e.g., administrative staff person, Department Evaluation Committee, Chair).*

## I. Dossier Review and Approval

Once a faculty packet has been submitted, it will be managed through *Interfolio RPT*, by the department's and/or division's designated administrative staff person. The administrator can view the status of your case as it moves through the workflow.

## J. Questions and Troubleshooting Problems

If you have specific questions regarding anything contained in this guide, 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.