

# Accessing Files for Review

1. Log in to your Interfolio account via the Faculty Affairs website under the “Retention, Tenure and Promotion” page and click on “eWPAF: Reviewer Resources”

San Francisco State University | A-Z | Calendar | Login | Search

## Faculty Affairs and Professional Development

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### Welcome

Welcome to the Office of Faculty Affairs & Professional Development, in the division of Academic Affairs. The office has oversight of all faculty-related functions of Academic Affairs, including faculty hiring, retention, tenure, and promotion evaluation, sabbatical leaves and other professional leaves, and the Faculty Early Retirement and Pre-Retirement Reduction in Time Base Programs, as well as overseeing Labor Relations and grievance procedures for faculty employee bargaining units.

It is our goal to administer academic employment processes effectively and efficiently and to serve as a resource for faculty from hire to retire. We offer guidance, consultation, instrumental support for the implementation of University and Academic Senate Policies.

### Announcements

#### SF State Research and Scholarly Activity Fund AY2020-2021

The **SF State Research and Scholarly Activity Fund** aims to support the creation of new or ongoing research projects and scholarly activities (including creative works and community-engaged activities) that encourage application to externally funded opportunities and/or bring external recognition to the PI and university.

Two separate grant opportunities are available within this single announcement.

- Faculty who are creating new projects, new scholarship activities, or new creativity directions are encouraged to apply for a Development of Research and Creativity (DRC) Grants, funded by the CSU Chancellor's Office.
- Faculty who are engaged in continuing work (e.g., preparing a scholarly manuscript for publication, completing creative work, conducting data analysis), or other scholarly work

**Search Faculty Affairs**

Search

**Contact**  
Office of Faculty Affairs & Professional Development  
1600 Holloway Avenue  
Administration 451  
San Francisco, CA 94132

Hours: M-F, 8:00 am - 5:00 pm  
Main Line: 415.338.2204  
Email: [facaffrs@sfsu.edu](mailto:facaffrs@sfsu.edu)

Quick Links  
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Tenure-Track Faculty

### Retention, Tenure and Promotion Policies and Resources

#### Academic Senate Policies

Retention, Tenure, and Promotion Policy #S19-241

#### Departmental Criteria

Departmental Criteria Directory

#### Resources

2019-2020 Retention, Tenure, and Promotion Deadline Calendar

Standards for Curriculum Vitae

WPAF: Adding Materials After RTP Closing Date

Outside Reviews in WPAF--Recommendations for Process

Evaluating Service

#### Forms

Promotion Eligibility Acknowledgment Form

#### Post-Tenure Review

Post Tenure Checklist

PTR Routing Sheet

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Quick Links  
Academic Affairs

- Click on the sign-on link <https://account.interfolio.com/sso>

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## Faculty Affairs and Professional Development

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### Reviewers

San Francisco State has adopted an eWPAF platform, Interfolio. This page offers support for reviewers on using the eWPAF Platform.

#### Reviewer Resources

eWPAF Sign-on: <https://account.interfolio.com/sso>

- Reviewer Help Guides
- Downloading Instructions

**Search Faculty Affairs**

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**Quick Links**  
[Academic Affairs](#)

- Search for San Francisco State University from the drop down menu and select **SIGN IN**. Sign in with your SFSU credentials on the next page.

interfolio

Already have an account? [Sign In](#)

## Sign in through your institution

If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.

[Sign In](#)

[Sign in with an Interfolio account >](#)

Don't have an account? [Sign up now.](#)

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

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4. Click on Cases from the Menu on the left side of the page. A list of cases available for review will appear.
  - Select the case you are reviewing from the list of available cases or by entering the candidate's name in the search box.
  - Click on the candidate's name to view the case.

San Francisco State University >

## Cases

Create Case ▾

Search cases

3 of 3 cases

Filtered By: Active Cases ✕

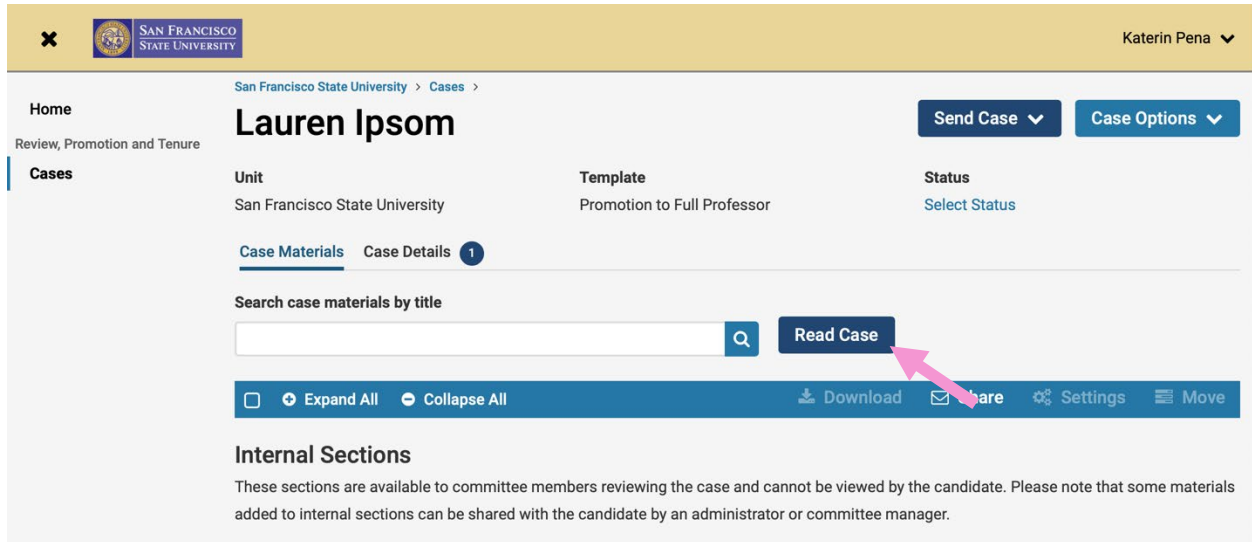
Name ▾	Type ▾	Template Name ▾	Status ▾
<input type="checkbox"/> <a href="#">Lauren Ipsom</a> San Francisco State University	Review	Promotion to Full Professor	● Test - Promo to Full
<b>Step 3 of 7:</b> Chair/Director			
<input type="checkbox"/> <a href="#">Lauren Ipsom</a> San Francisco State University	Review	Short Review - AA	● Test - 1st Year Reviews
<b>Step 3 of 6:</b> Chair/Director ⚠ Required Documents			
<input type="checkbox"/> <a href="#">Lauren Ipsom</a> San Francisco State University	Review	Comprehensive Review - AA	● Test - 2nd Year Reviews
<b>Step 1 of 6:</b> Faculty Affairs & Professional Development			

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Program Policies

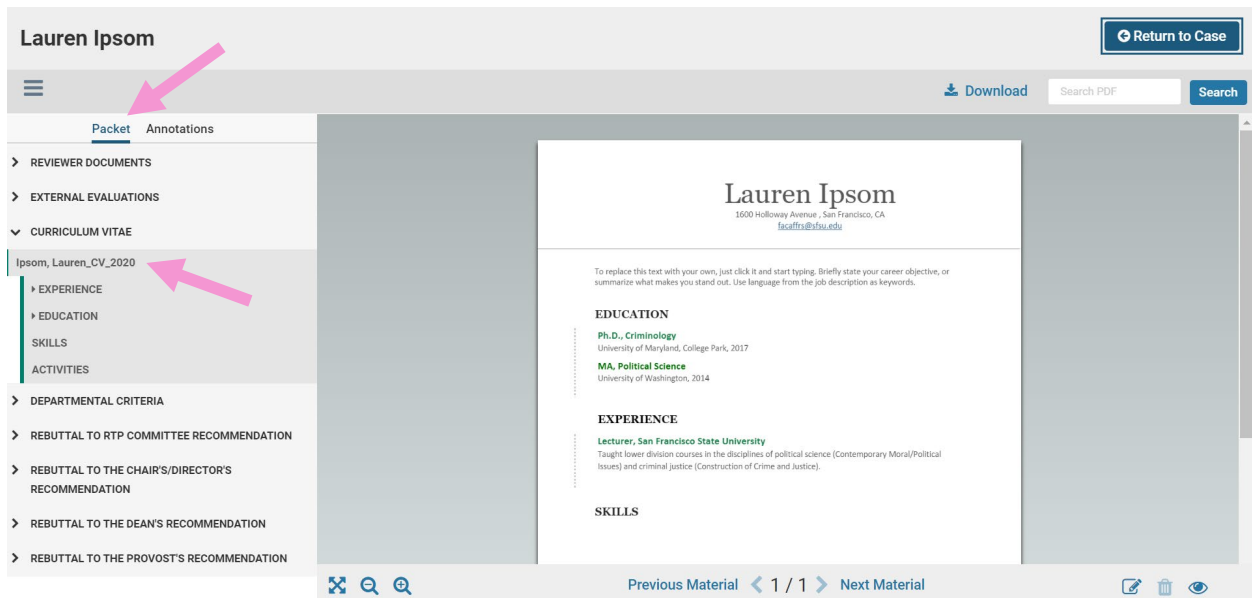
# Reviewing Files

## Viewing the File

1. Once inside a candidate's file, click "Read Case" next to the search case materials box.



2. Select items to review from the index menu on the left of the screen. Documents will show in the document reader panel on right hand side of the screen.



You may also access faculty materials to review by going to the **Candidate Packet** section of the case file. Select the section, and click on the material to review. This will bring you to the **Packet** page of the case file.

**IMPORTANT:**

Please **DO NOT UNLOCK** sections to view uploaded materials.

The screenshot shows the 'Candidate Packet' interface. At the top, there is a blue navigation bar with 'Expand All', 'Collapse All', 'Download', 'Share', and 'Settings' options. Below this, the 'Candidate Packet' section is titled, with a note stating: 'Any materials added to the candidate packet 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 before they submit.' Three pink arrows point to the 'Candidate Packet' title, the 'Curriculum Vitae' section header, and the file name 'Ipsom, Lauren\_CV\_2020' in the table.

**Curriculum Vitae** Locked Unlock

Curriculum Vitae 1 required Add File

Title	Details	Actions
<input type="checkbox"/> Ipsom, Lauren_CV_2020	Submitted by Lauren Ipsom Aug 17, 2020	<a href="#">Edit</a>

> Departmental Criteria Locked Unlock

> Rebuttal to RTP Committee Recommendation Unlocked Lock

## Submitting Reports

After reviewing the candidate's file and completing the report, there are three actions to take in order to complete the current level of review.

### SHORT REVIEW files - 1<sup>st</sup> Year, 3<sup>rd</sup> Year and 5<sup>th</sup> Year

Short Review files require the completion of the Reviewer Form (also referred to as a Cover Sheet) at the RTP Committee, Chair/Director, and the Dean/University Librarian review levels. Only one Reviewer Form is required at each level of review.

- Step 1: Complete the required Reviewer Form
- Step 2: Share the Reviewer Form with the candidate and notify them of review completion
- Step 3: Send the file forward to the next level of review

#### Step 1: Complete the required Reviewer Form

1. From the main view of the candidate's file, go to **"Internal Sections"** and click on the **"View"** option

**Lauren Ipsom** Send Case Case Options

Unit: San Francisco State University    Template: Short Review - AA    Status: ● Test - 1st Year Reviews [change](#)

Case Materials    Case Details **1**

Search case materials by title  Q Read Case

Expand All Collapse All Download Share Settings Move

**Internal Sections**  
These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

You are asked to submit required items as part of this case. [View](#)

2. This will take you to the **"Case Details"** page of the faculty's file. In the **"Required Items"** section, select **"Manage Respondents."**

San Francisco State University > Cases >

**Lauren Ipsom** Send Case Case Options

Unit: San Francisco State University    Template: Short Review - AA    Status: ● Test - 1st Year Reviews [change](#)

Case Materials    **Case Details**

Reviewing as  
Faculty Affairs Staff-1

**Required Items**  
All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Form Name	Assignee	Actions
RTP Committee Short Review Form 2 required questions	Committee Managers	<a href="#">Manage Respondents</a>

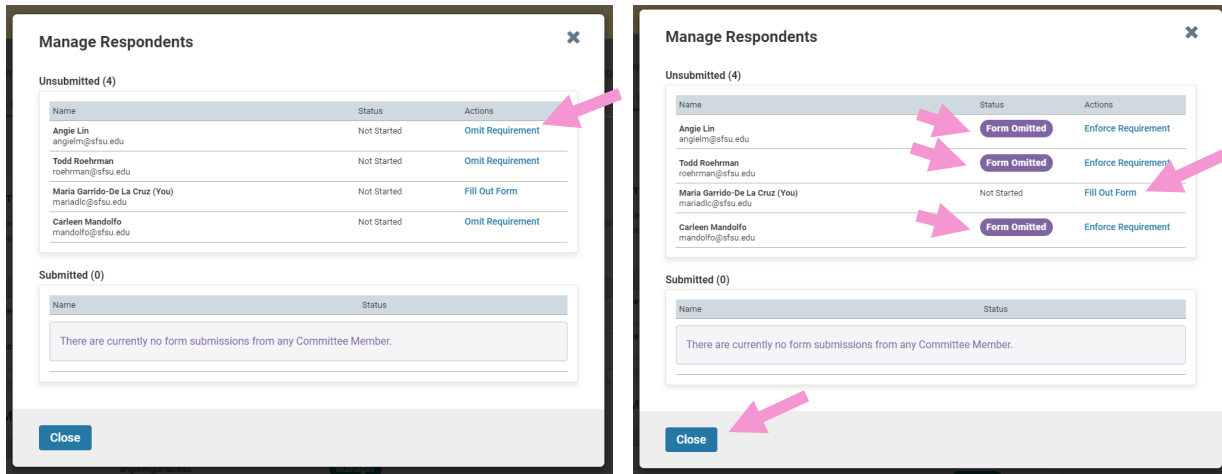
3. Reviewing Committee should decide who amongst the members will be completing the required Reviewer Form. For example, for the Department RTP Committee, the form is typically completed by the RTP Committee Chair.

**IMPORTANT STEP:**

Member completing the Reviewer Form will need to take the following steps to “omit” other members from having to complete the form as ONLY one form is required at each review level.

- 3A. Click on **“Omit Requirement”** option for all other members; and Status should indicate **“Form Omitted.”**

- 3B. Click on **Close** button on the bottom of the screen when done.



4. In the **“Required Items”** section, the member completing the Reviewer Form should now see their name under Assignee to complete the form. Click on the **“Fill Out Form”** option to access the Reviewer Form page.



## 5. Reviewer Form page

There are two (2) required questions that need to be completed:

- 1) if the candidate's file has been reviewed; and
- 2) if the candidate is meeting RTP criteria applicable for the current review period.

There is an option to provide additional comments, if needed.

### RTP Committee Review Form

RTP Committee completes this form for short reviews for faculty in their 1st, 3rd, & 5th probationary years.

The RTP Committee has reviewed the candidate's file in the following areas of evaluation (check off items below): \*

- Teaching Effectiveness
- Professional Achievement and Growth
- Service to Campus and Community

The candidate is meeting the RTP criteria for the current review period. The RTP Committee \*

- Recommend retention for the next academic year.

Optional Comments from the RTP Committee

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, link, unlink, and help.

Per rview of faculty CV, Dr. Lauren Ipsom is on track for retention for a 2nd probationary year.

body p

97 / 8000 characters

6. Click on **“Submit Form”** button at the bottom of the page when done. A message will be displayed to confirm action. Click **“Yes.”**

Reviewer will be able to change or edit responses while the case file is at the current step.

Last saved on Aug 17, 2020 at 4:20 PM EDT

**Submit Form**

Save Responses

Cancel

#### Confirm

Submitting the form "RTP Committee Review Form" will make your responses available to the appropriate members for review. You will be able to change or edit your responses while the case is at the current step.

**Yes**

No



**Step 2: Share the Reviewer Form with the candidate and notify them of review completion**

- From the main view of the candidate’s file, click on the checkbox next to your file and select “Share” from the blue bar at the top. Select “With Candidate” to share the letter with the candidate.

The screenshot shows the top navigation bar with 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move' buttons. A dropdown menu is open under 'Share', showing 'With Candidate' and 'With Committee Members'. Below this is the 'Internal Sections' area with a description. The 'Reviewer Documents' section is expanded, showing a list of documents. The first document is 'RTP Committee Short Review Form | Step 1: Faculty Affairs Staff-2' and the second is 'RTP Committee Short Review Form | Step 2: Faculty Affairs Staff-1', which is selected with a checkbox. A table below lists committee forms with columns for Title, Details, and Actions.

Title	Details	Actions
<input type="checkbox"/> RTP Committee Short Review Form   Step 1: Faculty Affairs Staff-2	Last Response Submitted Jul 8, 2020	Edit
<input checked="" type="checkbox"/> RTP Committee Short Review Form   Step 2: Faculty Affairs Staff-1	Last Response Submitted Aug 17, 2020	Edit

- Give your message a subject and a message text.  
**Message should include: “You have 10 days to submit a rebuttal for this review.”**
- Verify that the correct letter is attached by confirming that the file name is below.
- Leave “File Response” box blank/unchecked.
- Click “Send” button at the bottom of the page to send message to candidate.

The screenshot shows the 'Message to Candidate' form. The 'To' field is 'Lauren Ipsom (facaffrs@sfsu.edu)'. The 'Subject' field contains 'Lauren Ipsom, 1st Year Review - RTP Committee Recommendation'. The 'Message' field contains the text: 'Dear Faculty, The Department RTP Committee has completed the review of your case file. You have 10 days to submit a rebuttal for this review. Sincerely, Reviewer'. The 'Share Files' section shows a file named 'RTP Committee Short Review Form' attached. A 'Details' sidebar on the right shows 'Direct email reply: mariadlc@sfsu.edu' and 'File Response: Enable' with an unchecked checkbox.

**Step 3: Send the file forward to the next level of review**

**NOTE: Reviewers will lose access to the file after sending case forward to the next level of review. Verify all steps have been completed before sending the file forward.**

- 12. After sending your review to the candidate, go to the main view of the candidate’s file.
- 13. Select **“Send Case”** from the top of the page and click on the **“Forward to”** next level of review.

San Francisco State University > Cases >

## Lauren Ipsom

**Unit**  
San Francisco State University

**Template**  
Short Review - AA

**Status**  
● Test - 1st Year Reviews [change](#)

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

**Reviewing as**  
Faculty Affairs Staff-1

**Required Items**

All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

**Forms**

Form Name	Assignee	Actions
<b>RTP Committee Short Review Form</b> 2 required questions	Committee Managers	<a href="#">Manage Respondents</a>
<b>RTP Committee Short Review Form</b> 2 required questions	Maria Garrido-De La Cruz ( <b>You</b> )	<a href="#">Edit Submission</a>

**> Committee Members (4)** [Email](#) [Edit](#)

**Send Case** ▾

- Forward to  
Chair/Director
- Backwards to  
Faculty Affairs & Professional  
Development

14. From the pop up window, select the option to “Send a message to the reviewers gaining access”. This will send an email notification to the next level of review telling them the case is ready for review.

15. Provide a subject and text for your message.

16. Click on “Continue” button to move the file to the next level of review.

**Send Case Forward** ✕

Great job! You're sending the case forward to the next step, Chair/Director. The following reviewers will lose access to the case:

Faculty Affairs Staff-1 | 4 members

The following reviewers will gain access to the case:

Faculty Affairs Staff-1 | 4 members

Send a message to the reviewers gaining access.  
If recipients respond to this message, their response will come directly to your email inbox.

**Subject \***

Dr. Lauren Ipsom, 1st Year Review

**Message \***

Dear Department Chair,

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,  
RTP Committee Chair

body p

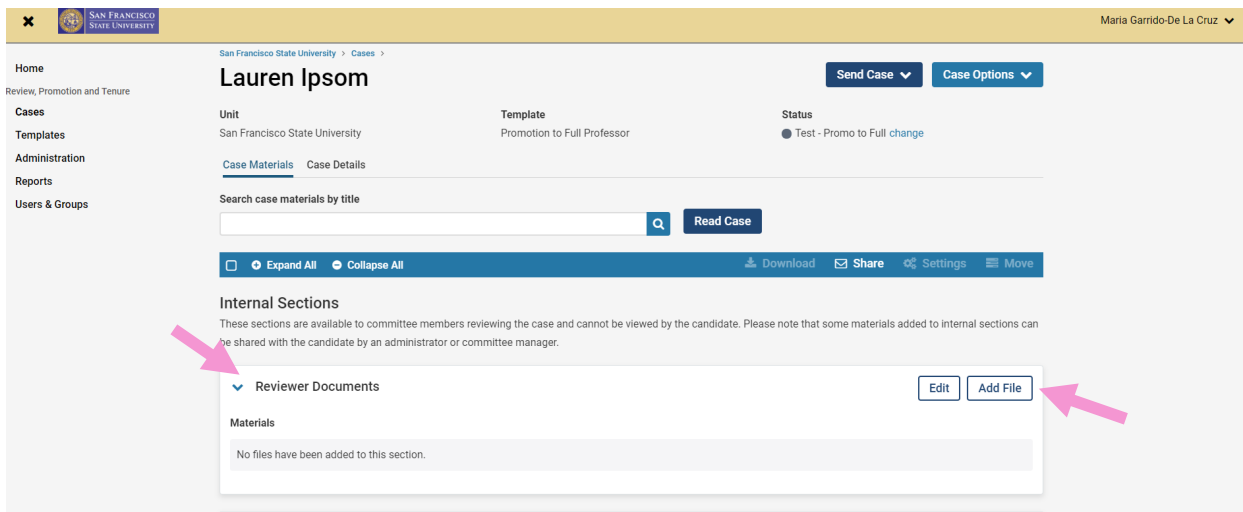
Preview Continue Cancel

# COMPREHENSIVE REVIEW files – 2<sup>nd</sup> Year, 4<sup>th</sup> Year, Tenure and/or Promotion

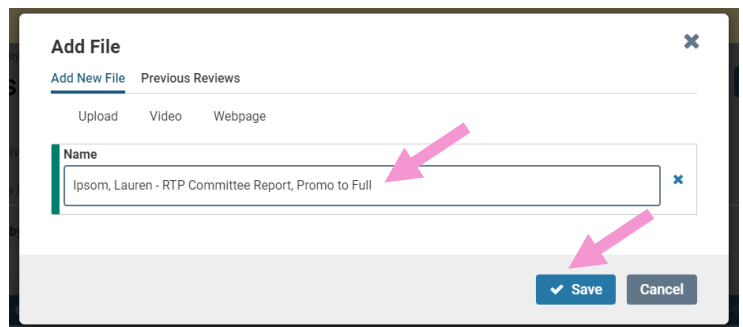
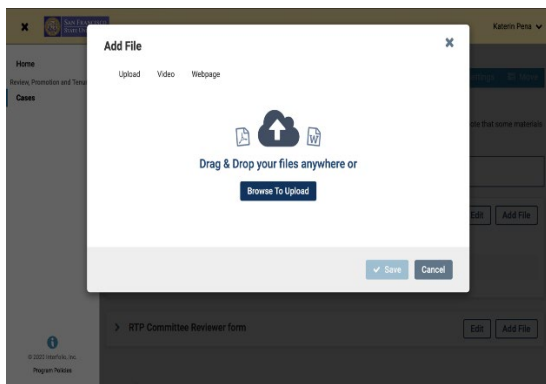
- Step 1: Upload the report to the candidate’s file
- Step 2: Share the uploaded report with the candidate and notify them of review completion
- Step 3: Send the file forward to the next level of review

## **Step 1: Upload the Report to the candidate’s file**

1. From the main view of the candidate’s file, go to the “**Reviewer Documents**” section under **Internal Sections**
2. Select “**Add File**”



3. Drag and drop or browse your computer for the report for your level of review.
4. Rename the file as needed and then click “**Save.**”



## Step 2: Sharing Reviewer letters with the Candidate

- From the main view of the candidate's file, click on the checkbox next to your uploaded file and select "Share" from the blue bar at the top. Select "With Candidate" to share the letter with the candidate.

San Francisco State University > Cases >

# Lauren Ipsom

Unit: San Francisco State University | Template: Promotion to Full Professor | Status: Test - Promo to Full change

Case Materials | Case Details

Search case materials by title

Expand All | Collapse All | Download | Share | Settings | Move

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Sections added to internal sections can be shared with the candidate by an administrator or committee manager.

Reviewer Documents

Title	Details	Actions
<input checked="" type="checkbox"/> Ipsom, Lauren - RTP Committee Report, Promo to Full	Added by Maria Garrido-De La Cruz Aug 17, 2020	Edit

- Give your message a subject and a message text.  
**Message should include: "You have 10 days to submit a rebuttal for this review."**
- Verify that the correct letter is attached by confirming that the file name is below.
- Leave "File Response" box blank/unchecked.
- Click "Send" button at the bottom of the page to send message to candidate.

Message to Candidate

To: Lauren Ipsom (facaffrs@sfsu.edu)

Subject: Lauren Ipsom, Promotion to Full Review - RTP Committee Recommendation

Message:

Dear Faculty,  
The Department RTP Committee has completed the review of your case file. You have 10 days to submit a rebuttal for this review.

Sincerely,  
RTP Committee Chair

Share Files

Files shared with this message can be viewed by the candidate after logging into Interfolio.

Ipsom, Lauren - RTP Committee Report, Promo to Full

Details

Direct email reply: mariadic@sfsu.edu

File Response:  Enable

When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

Preview | Send | Cancel

### **Step 3: Sending the File Forward to the next Level of Review**

**NOTE: Reviewers will lose access to the file after sending case forward to the next level of review. Verify all steps have been completed before sending the file forward.**

10. After sending your review to the candidate, go to the main view of the candidate's file.
11. Select **"Send Case"** from the top of the page and click on the **"Forward to"** next level of review.

San Francisco State University > Cases >

## Lauren Ipsom

**Unit**  
San Francisco State University

**Template**  
Promotion to Full Professor

**Send Case** ▾ **Case Options** ▾

- Forward to Chair/Director
- Backwards to Faculty Affairs & Professional Development
- Development

Case Materials Case Details

Search case materials by title

Expand All Collapse All Download Share Settings Move

### Internal Sections

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▼ Reviewer Documents

**Materials**

Title	Details	Actions
<input type="checkbox"/> Ipsom, Lauren - RTP Committee Report, Promo to Full	Added by Maria Garrido-De La Cruz Aug 17, 2020	<input type="button" value="Edit"/>

12. From the pop up window, select the option to “Send a message to the reviewers gaining access”. This will send an email notification to the next level of review telling them the case is ready for review.

13. Provide a subject and text for your message.

14. Click on “Continue” button to move the file to the next level of review.

**Send Case Forward** ✕

Great job! You're sending the case forward to the next step, Chair/Director. The following reviewers will lose access to the case:

Faculty Affairs Staff-1 | 4 members

The following reviewers will gain access to the case:

Faculty Affairs Staff-1 | 4 members

Send a message to the reviewers gaining access.  
If recipients respond to this message, their response will come directly to your email inbox.

**Subject \***

Dr. Lauren Ipsom, Promotion to Full Review

**Message \***

Dear committee members,  
This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.  
Best,  
RTP Committee Chair

body p

Preview Continue Cancel