Stony Brook University, College of Arts and Sciences

Interfolio Procedures for Review, Promotion, and Tenure (RPT)

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Review, Promotion, and Tenure for Administrators

This checklist is intended for Administrators who are new to Interfolio Review, Promotion, and Tenure.

Getting Started

- Sign In to Interfolio
    - Please log into Interfolio.com through "Partner Institution" in order to access your SBU Interfolio Review Promotion Tenure (RPT) cases.
    - Once you select "Partner Institution" please search for and select "Stony Brook University" from the drop down menu
    - Log in via SSO/Single Sign On using your Net ID and password.

Create a Case

- Check to see if candidate is in Interfolio database
    - Select "User and Groups" from under RPT menu on left
    - Enter candidate name in search; if not there they will need to be entered
    - Enter new faculty into the database
- Click "Create Case" button on the top right corner
    - Indicate if the Candidate will be involved in case (yes, if they will be uploading their own documents or no, if the administrator will be uploading them on the faculty member's behalf)
    - Select unit (department)

Case Data Forms: case data forms are used to include additional data about candidates in a case. SBU didn't not create any case data forms so this can be skipped.

Create an Ad hoc Committee: You can create a committee for the faculty in your department so that the file can be shared. Please keep the name of the committee general (ie: Department name_Full Professor Committee). You can edit the membership of an ad hoc committee in the case once created.

Candidate Documents (At SBU, the Bio File)

- If candidate is uploading their own documents, send a notification to candidate to start uploading their documents: Notify Candidate
  We recommend that candidates upload their own documents. The files must follow the parts of the Bio File as defined by the Arts and Sciences Senate, Promotion and Tenure Committee.

- Please note: If administrator is uploading the documents on the candidate's behalf, the 1st page of the Bio File should be included in the case. There is a Personal Information form embedded in Interfolio that will not be completed if the candidate doesn't upload their own documents. How to upload documents into case.

Internal Sections

General Evaluative Documents

Upload required documents under "Case Details" section

Documents should be named to match exactly the name in the list of required documents (ie: 1. Announcement of Candidacy, 2. Chair's letter summarizing evaluations/recommendations, etc.)

Solicited letters that candidate may read should be compiled into a single PDF document and bookmarked by name or if redacted (ie: Redacted Letter 1, Redacted Letter 2, etc.)

Peer Observations should have a disclosure statement in the observation or be accompanied by a disclosure form releasing the letter to the candidate as it stands (should not be a redacted version)

You will need to put a placeholder if you don't have a document to place in any of sections (ie: A blank PDF with "N/A" will suffice

List of required documents (11):

1. Announcement of Candidacy
2. Chair's letter summarizing evaluations/recommendations
3. Optional coded Chair's supervisory letter
4. Faculty sign-off sheet for having read Chair's letter*
5. Purged copy of letter(s) sent to referees
6. List of all classes taught
7. Teaching Evaluations
8. Peer Observation 1
9. Peer Observation 2
10. Course Materials
11. Solicited Letter (candidate has permission to view) of Required Documents:

Special Evaluative Documents

Upload required documents under "Case Details" section

Documents should be named to match exactly the name in the list of required documents (ie: 1. Sign off sheet indicating faculty have reviewed the file, 2. Key (s) identifying confidential sources quoted in Chair's letter(s), etc.)

External Referee letters should **not** appear in this section. They should be in the External Evaluations section

List of Referees and credentials should appear on the template provided at the CAS website [put link]. NB: this is a change of policy.

You will need to put a placeholder if you don't have a document to place in any of sections (ie: A PDF document with"N/A" will suffice

Letters on teaching should be compiled into a single PDF and bookmarked

Letters from the University community should be compiled into a single PDF and bookmarked

List of Required Documents (8):

1. Sign off sheet indicating faculty have reviewed the file*
2. Key(s) identifying confidential sources quoted in Chair's letter(s)
3. Faculty Vote*
4. List of external referees and credentials
5. Solicited and signed letters addressing candidate's teaching
6. Letters from University Community
7. Departmental committee letter(s) or reports
8. Additional materials received after the discussion and vote

* Please note: we are working on establishing a process of using Committee Forms so that the faculty vote and the faculty sign off for the chair's letter and the file can be done within Interfolio. We will keep you posted.

External Evaluations

Letters from External Referees should appear ONLY in this section

Process:

[Send a request for an evaluation from an External Referee](#)

[Resend a request to an external referee](#). If you have to resend a request for an evaluation, the request should be "re-sent" not send another request. To avoid duplicates going forward, re-sending the request to evaluators as opposed to creating entirely new requests will resolve creating a duplicate request. Once an evaluator has interacted with a request (accepted, declined, or uploaded their letter) the request or letter can't be deleted.

Additional Resources:

[RPT Webinars and Tutorials](#)

[Demo on Committee Forms:](#)

Please Direct Questions about Interfolio Processes at Stony Brook to:
CAS_Facultyaffairs@stonybrook.edu