General Questions

The case won't load; Interfolio is slow.

Sometimes this happens. Logging out of Interfolio, refreshing the browser, and then logging back in usually works. Otherwise just try giving it a few minutes. System slowness *sometimes* seems to be linked to the number of users accessing the system at once. If it helps, remember that you can download file materials for offline access.

Wait, I can download the file?

Yes. File materials may be downloaded for offline access via either the Case Materials tab or the "Read Case" viewer. Please remember that faculty-candidates have the right to a confidential review process, and faculty-reviewers have an obligation to ensure the integrity of the process and to respect the intellectual property of our colleagues. Please treat downloaded materials with the same care as you did the paper binder, and delete downloaded materials following review.

I'm supposed to complete this form but it won't load.

Try switching browsers. Interfolio is not compatible with Internet Explorer, although different users have reported success by switching to a variety of browsers (e.g. Firefox) and/or disabling ad-blocking. If this doesn't work, see note about system slowness above, and try logging out/refreshing/logging back in.

I need assistance. Who can help me?

Questions about Interfolio or requests for technical assistance should be directed to the Interfolio Administrator, currently Barbara Hillery. Questions about ARPT procedures more generally – or about where to direct questions – should be directed to ARPT. You can also help yourself by reviewing the provided support materials.

Process Questions

When can I start working on my file?

Candidate files in Interfolio (i.e. "cases") will be initialized at the end of Fall semester for Spring reviews, and at the end of June for Fall reviews. Notification emails are sent from "SUNY College at Old Westbury" <noreply@interfolio.com>. The contents of the file in Interfolio follow the guidelines described in the ARPT Manual, so you can start preparing your materials any time.

My file was submitted but I haven't heard anything. Did I miss something?

Probably not. Please review the table at the end of this document for an overview of how files move through the process and when you can expect to be notified. In short: the review process takes time.

Will I get file materials back?

At the end of the review process your complete electronic file is returned to you. Original files that you uploaded into the system are also stored via "Your Packets" in Interfolio, and in Dossier if you chose to duplicate them there.

I got my file back, now what?

Download copies of your Department Evaluation and ARPT Recommendation for easy access; you'll need these for future reviews. You may also download the full file (.pdf or .zip) for archiving. Review cases will eventually be closed in Interfolio, at which point you will maintain access to the original materials that you uploaded (via your Packet and Dossier), but will lose access to materials uploaded by others. The Interfolio Administrator will communicate the timeline for this process.

I am starting to prepare my next file, but haven't received my last file back yet. What do I do?

Contact Human Resources for assistance.

I want to get feedback on my materials before I "submit" my "packet." Is there a way to do that?
Once the candidate packet is submitted it can be cumbersome to modify, so Interfolio should generally be treated as a tool to move final versions of materials through the review process. Faculty have reported sharing early drafts of materials via email or external electronic folders (e.g. OneDrive).

Interfolio can also facilitate this process through its "Dossier" system. As you upload materials to your packet, they will be duplicated to Dossier by default. Navigate to Dossier (at the top right of your Interfolio page) and add the appropriate materials to a "collection." Collections can be shared electronically by email link. Users will not be able to download from this link, but they can review and add comments. Note that the materials in Dossier are not automatically sorted into the appropriate sections, but if you named files well it should be enough to get a sense of your file. Alternatively, create multiple "collections" corresponding to sections of your file.

I highlight my name in the .pdf, and it redacts it in Interfolio. Argh.
Highlight your name, print the file to a new .pdf, and upload that (secondary) version. Alternatively, modify the .pdf by putting a symbol in the margin, rather than over the text.

I can't see the Peer/Internal Letters that my EC Chair uploaded.
Make sure you are accessing your file through the "Cases" tab on the Navigation Panel at the left of the Interfolio home page (rather than as your "Packet," which only includes the documents you upload yourself). Once there, scroll down below the Candidate Materials to find the section for Internal Letters, as well as the other sections of your file to which folks will be adding materials throughout the review process.

If you don't see your letters in the corresponding folder, check with your chair to make sure they were added to the right place. Documents can be moved or re-uploaded if necessary.

My file has been submitted to the Evaluation Committee, but I need to modify <some document>.
Only the Evaluation Committee Chair and Candidate – designated as "Committee Managers" – are able to add, remove, or edit files in the case, and only at steps that include them (File Submission, Evaluation Committee Review, Department Review).[1]

To make modifications to the "Candidate Documents" section, the Candidate should:

- Access the file via Cases on the Navigation Panel
- Click the green "Unlock" button at the top of the Candidate Documents section

- Navigate to "Your Packets" on the Navigation Panel, select the appropriate/current packet
- Expand the Candidate Documents section and scroll to the section/document you want to modify
- Click "Edit" and then "Replace," and upload a new file.
  (Alternatively click remove and then add. It is not necessary to click "Submit" again.)

- Once you have uploaded the final document, navigate back to your file via the Cases tab, make sure it showed up as expected, and click "Lock."

Files added to the "Internal Sections" (e.g. Department Evaluation Subfile) cannot be removed from a case once the case has been sent forward to the next review step. Please keep ARPT guidelines about required review periods in mind when attempting to modify file contents.

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[1] Effective Fall 2021 the Candidate has "Committee Manager" status at both the Evaluation Committee and Department Review stages.

I want to confirm that my department faculty all got the file for review as expected.
The list of voting faculty for each department is confirmed prior to the launch of a candidate's file, usually by reaching out to the Department chair. Modifications to this list should be directed to the Interfolio Administrator.

Faculty can view who has access to the file at the current step under the "Case Details" tab by scrolling to the bottom and expanding the list of "Committee Members." Everyone listed here has access to the file at this step. The candidate's access is set up separately and is not listed with other voting faculty.

Some of my colleagues are listed as "Temporary" on that committee list. Is that okay?
Because of some restrictions on how Interfolio "committees" function, a subset of faculty must be added to reviews on a case-by-case basis. The "temporary" tag is a reflection of this setup, but is irrelevant for your department's process.

A member of my department is on leave and changed their mind about participating in this review. How do they get access to the file?
In some cases (depending on setup specifics) the EC chair may be able to update voting faculty access to the file directly. Open the candidate's case, select Case Details, scroll down to Committee Members, and select Edit to modify who has access to the file. Select "∅" to recuse a faculty member from this file, "+" to add back in a recused faculty member. Un-toggling manager will take away your manager privileges (so don't do that); toggling a second manager will duplicate some forms (also not advised). In cases where these functions are not visible to you, or for assistance, contact the Interfolio Administrator.

A voting member of my department had an emergency and participated in the review but can't complete the final sign-off. How can I send the case forward with this outstanding requirement?
Under Case Details, the EC Chair (designated as Committee Manager) can select "Manage Respondents" beside the name of the form. Selecting "Omit Requirement" beside the name of the person who is unable to sign will typically allow you to send the case forward without the completed form. If a signature will not be included in the file, an explanation must be included in the Procedures Statement, so be sure to add one. Note that this solution may not be allowed by the system for faculty members labelled as "temporary." For assistance contact the Interfolio Administrator.

I uploaded the Internal/Peer Letters for the candidate to the wrong place. How can I move them?
Locate your original upload, click "Edit → Edit Settings" beside the name of the specific file, and – in the case of Peer Letters – select "6b. Internal Letters" as the Section. Documents can only be moved within Internal Sections (not Candidate Documents), and in the step in which they were uploaded. Alternatively you can restrict document visibility and re-upload, or contact the Interfolio Administrator for assistance.

How do we remove the Evaluation Committee Report, since that's just a draft of our Department Evaluation?
Documents added to the "Internal Sections" (e.g. the Evaluation Committee Report) cannot be removed once the case has been sent forward to the next review step. Candidates have the right to respond to written Evaluation Committee Reports, and this document is shared with the Department for review. As such, even if it serves as a draft of the Department Evaluation (as it typically does), it should be included in the file sent forward to ARPT. Naming documents accurately enables ARPT to review them appropriately.

A faculty member completed the form to sign off on the final Department Evaluation before it was available. Now what?
Form completion is date/time stamped in Interfolio. Faculty should not complete the form to sign off on the finalized Department Evaluation prior to reviewing the final version of this document (so, at least after the Department Review Meeting). In cases where this error occurs, faculty members may select "Edit Submission" to re-submit the form, but doing so does not (currently) update the original date recorded. As such, the EC Chair should add a note to the Procedures statement explaining the discrepancy in dates and specify whether the faculty member reviewed the final document as required. It is not necessary to name the faculty member(s).

Overview of File Review Process in Interfolio

For information regarding the actions at each review stage and the candidate's rights, see the ARPT Manual.

Review Stage/File Jurisdiction	Interfolio Step	Who can see the file?	Candidate has/gains access to file at this step?	By when can I expect this to happen?
File Preparation	Candidate Uploads File	Candidate	Yes	Interfolio cases are initialized mid-December (for spring reviews) and end of June (for fall reviews)
Department Review	Evaluation Committee Review	Candidate and Evaluation Committee	Yes	Work backward from ARPT deposit date to allow required review periods; see manual.
	Department Review	Voting Members of Department and Candidate	Yes – Interfolio forms required	
ARPT Review	ARPT Committee Review	ARPT	No	As Scheduled
HR	Human Resources – Candidate Reviews File	HR Representative and Candidate	Yes – Interfolio form required	Typically by the end of winter break (fall reviews) or early summer (spring reviews) for positive recommendations. Earlier in cases of negative recommendations.
Academic Affairs	Dean/Director Review	Appropriate Dean or Director	No	**
	Provost Review	Provost and Administrative Support	No	**
	Candidate Reviews/Responds, Academic Affairs Forwards	Provost, Academic Affairs Administrative Support, Candidate	Yes – currently no Interfolio form required; email requested	**
President's Office	President's Office Review	President and Administrative Support	No	**
HR (for Processing)	Human Resources	HR Representative and Academic Affairs Administrative Support	No	**
Review Complete	Candidate	Candidate	Yes	** By notification deadline for non-renewals (only).

** Timing of these steps depends on the work of your Dean/Director, the Provost, President's Office, and Human Resources – and is beyond the scope of ARPT authority. In cases of non-renewal, the candidate must be notified by the deadline (per Article 32 of UUP CBA). We recommend talking with colleagues/mentors about their experiences. Questions about file processing post-ARPT review should be directed to HR.