

Interfolio Quick Guide for Voting Faculty – How to Complete Required “Sign Off” Forms

Prepared by ARPT Fall 2021

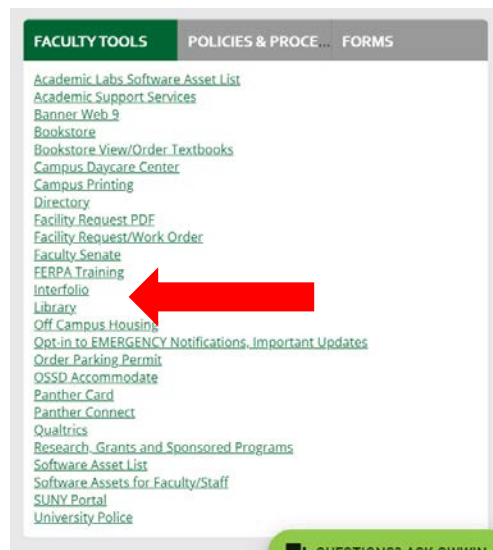
1. Log in to Interfolio When the candidate’s file is available for your review, you will receive an email notification with a direct link to the file:

File for Review

SC SUNY College at Old Westbury <noreply@interfolio.com>
To: Jillian Crocker
If there are problems with how this message is displayed, click here to view it in a web browser.

Reply Reply All

If you miss the email, there is also a link in the portal under Faculty Tools.

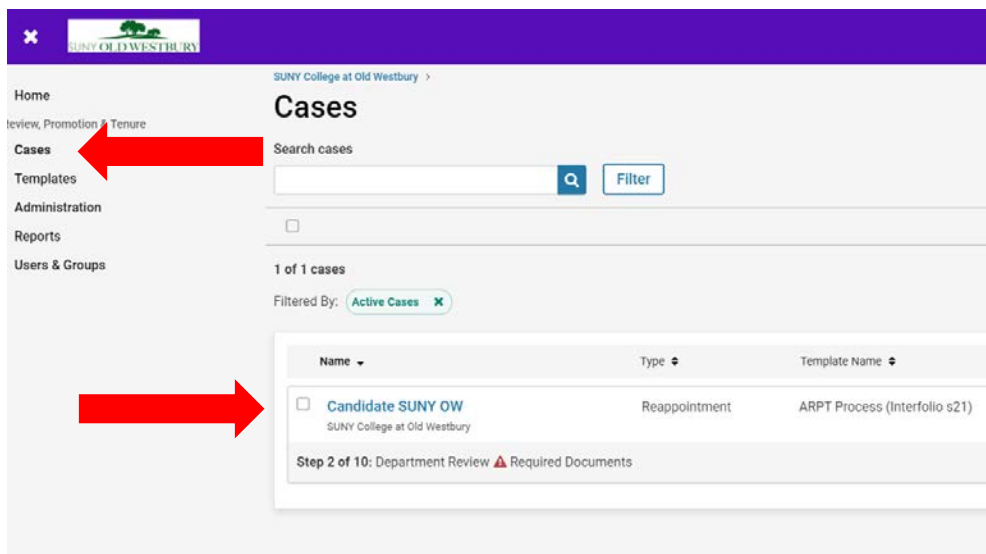


If you log in before a file is available for your review or before a case is launched in your name, you won’t see much.

2. Navigate to Candidate File

Access candidate files in through the “Cases” tab on the Navigation Panel.

You may also see files listed under “Home” (which is the landing page), but they disappear from that list once you have completed required items.



3a. Fill Out Forms to “Sign Off” on file and Department Evaluation (at the appropriate times).

Candidate files open to the “Case Materials” tab (which is where you’ll review the file content), but the forms you need to complete (and detailed instructions, links to resources, etc.) are **accessible under “Case Details.”**

After reviewing the file contents, select “**Fill Out Form**” to complete the required form:

“Department Faculty Sign Off 1 of 2: Confirm File Review.”

The screenshot shows the 'Candidate SUNY OW' page. The left sidebar has a 'Toggle Menu' button and a 'Home' link. The main content area has a breadcrumb 'SUNY College at Old Westbury > Cases >'. Below this is a header with 'Unit: SUNY College at Old Westbury', 'Template: ARPT Process (Interfolio s21)', and 'Status'. The 'Case Materials' tab is selected, and 'Case Details' is highlighted with a red arrow. Below the tabs, it says 'Reviewing as: Amazing Department Faculty'. There is an 'Instructions' section and a 'Required Items' section with a '2 missing' badge. A table lists the required forms:

| Form Name | Assignee | Actions |
|--|-------------------------|-------------------------------|
| Department Faculty Sign Off 1 of 2: Confirm File Review 1 required questions | Committee SUNY OW (You) | Fill Out Form |
| Department Faculty Sign Off 2 of 2: Confirm Department Evaluation Review 1 required questions | Committee SUNY OW (You) | Fill Out Form |

A red arrow points to the 'Fill Out Form' link for the first form. Below the table is a 'Committee Members (2)' section.

Complete and submit this first form **prior to your Department Review Meeting** to indicate that you have reviewed the candidate’s file (required for vote).

Form not loading? Switching browsers or logging out/back in to Interfolio usually does the trick.

The screenshot shows the 'Department Faculty Sign Off 1 of 2: Confirm File Review' form. The header says 'Please "sign off" by completing this form to confirm that you have reviewed file documents. File must be reviewed, and sign-off completed, in advance of Department Review Meeting. Form completion is date/time stamped.' The main content area has a question: 'Have you reviewed the contents of the file? *'. Below the question are two radio buttons: 'Yes, I have reviewed this file.' and 'No, I will not be participating in this review.' A red arrow points to the 'Yes' radio button. At the bottom, there are three buttons: 'Submit Form', 'Save Responses', and 'Return to Case'. A red arrow points to the 'Submit Form' button.

Great! Now: Stop.

There is a second form, and we know you want to be efficient, but **these forms are date/time stamped** – so please hold your horses.

3b. After the Department Review Meeting (**and after the finalized Department Letter is available**):

Log back in to Interfolio (see above) to review the Department Letter, added to the Department Evaluation subfile,

and complete the second required form:

“Department Faculty Sign Off 2 of 2: Confirm Department Evaluation Review” to indicate that you have read the **final version of the Department letter**.

The screenshot shows the Interfolio interface for a 'Candidate SUNY OW'. The left sidebar contains navigation links: Home, Review, Promotion & Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area has a header with 'SUNY College at Old Westbury > Cases > Candidate SUNY OW' and a 'Case Options' dropdown. Below this, there are fields for 'Unit' (SUNY College at Old Westbury), 'Template' (ARPT Process (Interfolio s21)), and 'Status'. A 'Case Materials' section includes a 'Case Details' tab with a red arrow pointing to it. Below this, a 'Reviewing as' section shows 'Amazing Department Faculty'. A 'Instructions' section is followed by a 'Required Items' section with a '1 missing' badge. A table lists required forms: 'Department Faculty Sign Off 1 of 2: Confirm File Review' and 'Department Faculty Sign Off 2 of 2: Confirm Department Evaluation Review'. The second form has a 'Fill Out Form' link with a red arrow pointing to it. At the bottom, there is a 'Committee Members (2)' section.

The screenshot shows the 'Department Faculty Sign Off 2 of 2: Confirm Department Evaluation Review' form. The header includes 'SUNY College at Old Westbury > Cases > Candidate SUNY OW > Department Faculty Sign Off 2 of 2: Confirm Department Evaluation Review'. The main content area has a question: 'Have you reviewed the Department Evaluation? *'. Below this, there is a text box with instructions: 'Please "sign off" by completing this form to indicate that you have reviewed the Department Evaluation. STOP: Please do not complete this form until AFTER the Department Review Meeting and AFTER you have reviewed the finalized Department Evaluation. Form completion is date/time stamped.' There are two radio buttons: 'Yes, I have reviewed the final Department Evaluation.' (with a red arrow pointing to it) and 'No, I did not participate in this review.' At the bottom, there are three buttons: 'Submit Form' (with a red arrow pointing to it), 'Save Responses', and 'Return to Case'.

Sign off too early/late? Discrepancies in date/time stamps should be communicated to the EC Chair and explained in the Department Procedures Statement (include specification of whether procedures were followed).

That's it - thanks!

By completing these forms at the appropriate times you are helping to ensure and document that required procedures were followed.