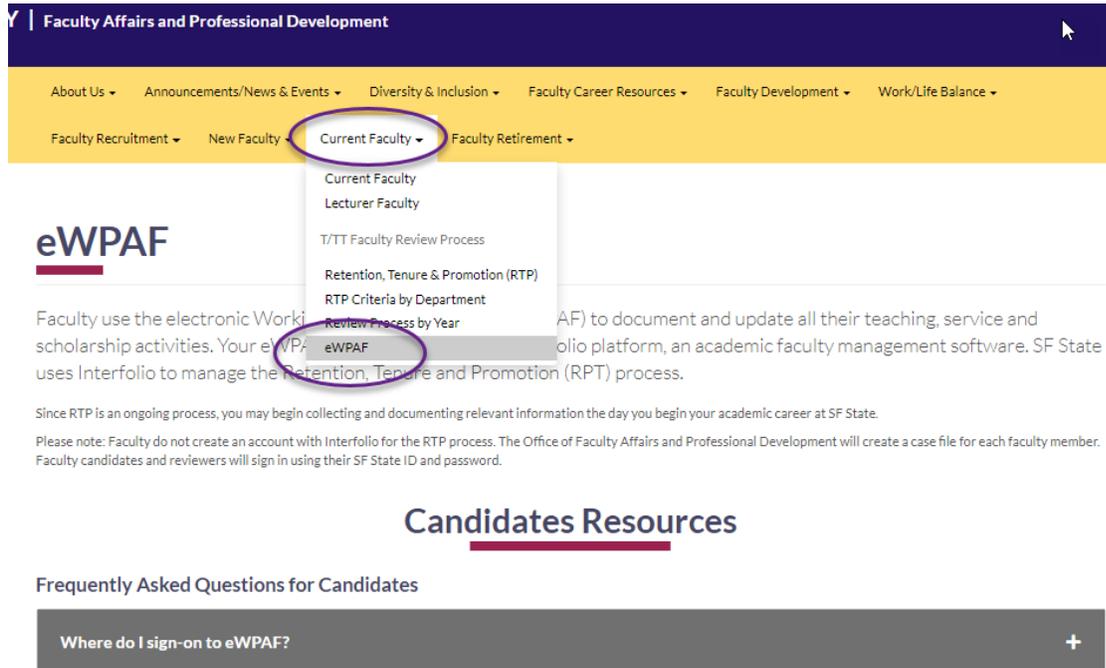
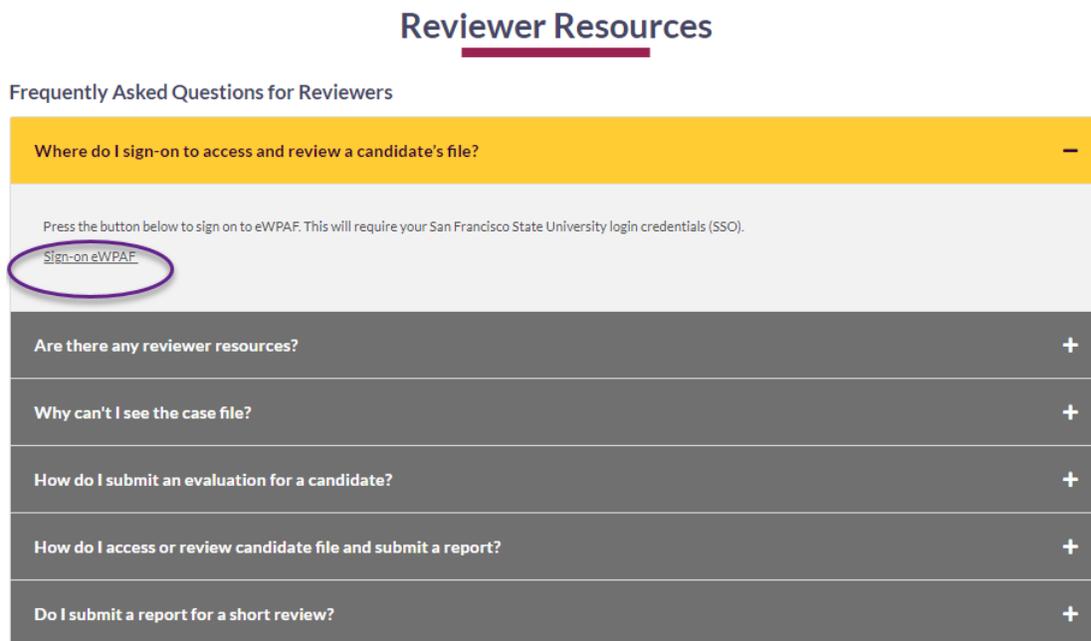


eWPAF Review Guidelines: Accessing Files for Review

1. Log in to your Interfolio account via the Faculty Affairs website. Select **“Current Faculty”** and select **“eWPAF”** <https://facaffairs.sfsu.edu/ewpaf>



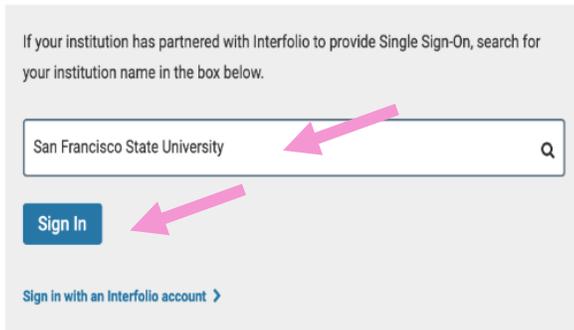
2. Scroll down the page to Reviewer Resources, click on the sign-on link <https://account.interfolio.com/sso>



3. 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.



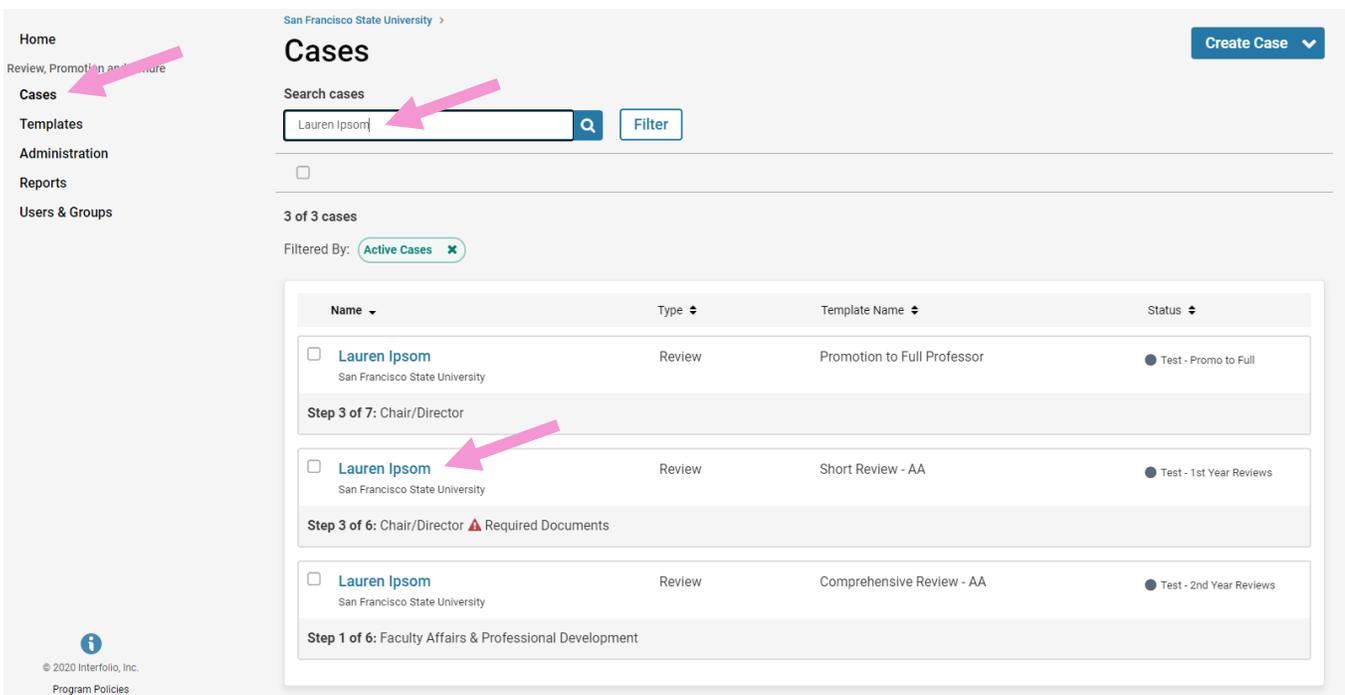
Sign in through your institution



Don't have an account? Sign up now.
Use Interfolio's suite of services to simplify your academic life.

Sign Up

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.



Reviewing Files

Viewing the File

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

The screenshot shows the top navigation bar with the San Francisco State University logo and the user name "Katerin Pena". Below the navigation bar, the candidate's name "Lauren Ipsom" is displayed prominently. To the right of the name are two buttons: "Send Case" and "Case Options". Below the name, there are three tabs: "Unit" (San Francisco State University), "Template" (Promotion to Full Professor), and "Status" (Select Status). A "Case Materials" tab is active, showing a search bar with the text "Search case materials by title" and a "Read Case" button. A pink arrow points to the "Read Case" button. Below the search bar is a toolbar with buttons for "Expand All", "Collapse All", "Download", "Share", "Settings", and "Move". At the bottom, there is a section titled "Internal Sections" with a brief explanation of their availability.

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.

The screenshot shows the document reader interface. On the left is a navigation menu with a "Packet" tab selected. The menu items include "REVIEWER DOCUMENTS", "EXTERNAL EVALUATIONS", "CURRICULUM VITAE", and several "REBUTTAL TO..." options. Under "CURRICULUM VITAE", the item "Ipsom, Lauren_CV_2020" is selected, and a pink arrow points to it. The main panel displays the curriculum vitae for Lauren Ipsom, including her name, contact information, and sections for "EDUCATION", "EXPERIENCE", and "SKILLS". A "Return to Case" button is visible in the top right corner. At the bottom, there is a navigation bar with "Previous Material", "1 / 1", and "Next Material" buttons, along with icons for search, refresh, and close.

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 are navigation options: 'Expand All', 'Collapse All', 'Download', 'Share', and 'Settings'. Below this is the 'Candidate Packet' header with a sub-header explaining that materials added are visible to the candidate and can be replaced or deleted in an unlocked section. The main content area is divided into three sections:

- Curriculum Vitae**: Labeled as 'Locked'. It includes an 'Add File' button and a table of submitted materials.
- Departmental Criteria**: Labeled as 'Locked'. It has an 'Unlock' button.
- Rebuttal to RTP Committee Recommendation**: Labeled as 'Unlocked'. It has a 'Lock' button.

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

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 - 1st Year, 3rd Year and 5th 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. The prompt to "submit required items" will appear if you are the RTP Committee Chair, Department Chair, or College Dean.

- 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

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

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.

Warning: 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."** **Disregard this step if there is only one case manager for the committee.**

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.

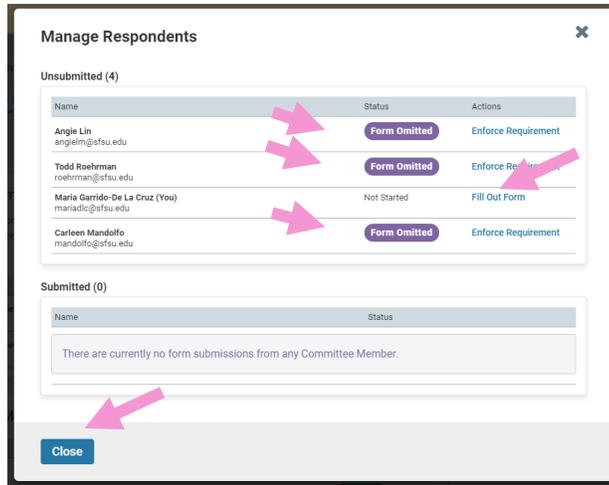
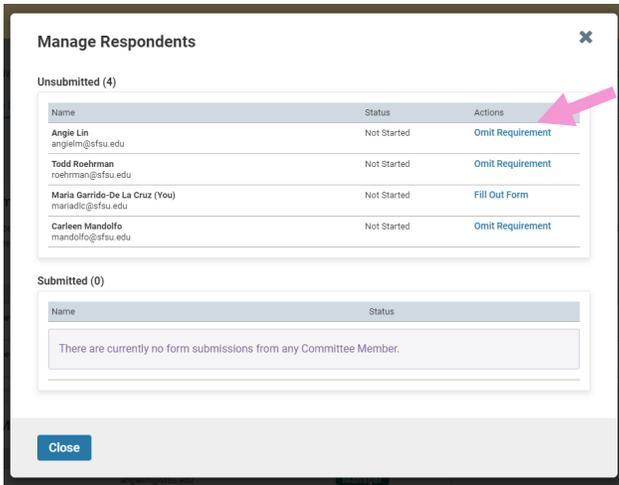
Form Name	Assignee	Actions
RTP Committee Short Review Form 2 required questions	Committee Managers	Manage Respondents

- The Department RTP Committee Chair, Department Chair/Director, and College Dean will each complete a committee form.

IMPORTANT STEP (This applies if there is more than one case manager):

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.

- Click on **“Omit Requirement”** option for all other members; and Status should indicate **“Form Omitted.”**
- Click on **Close** button on the bottom of the screen when done.



- 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

Per review 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.

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 Edit Add File

RTP Committee, Chair/Director, Dean, UTPC, and Provost evaluation letters and/or reports are uploaded in this section. For short reviews, a comprehensive evaluation is not required. Reviewers must complete and upload a Reviewer Form (also referred to as a Cover Sheet). This section of the case file is not visible to the candidate. **Reviewers MUST share the Reviewer Form with the candidate.** Please go to Faculty Affairs website for the Reviewer Form and directions under eWPAF Reviewer Resources: <https://facaffairs.sfsu.edu/faculty-reviewers>

Materials

No files have been added to this section.

Committee Forms

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.

Message to Candidate

To
Lauren Ipsom (facaffrs@sfsu.edu)

Subject *

Lauren Ipsom, 1st Year 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,
Reviewer

body p

Share Files

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

+ Add

RTP Committee Short Review Form

Details

Direct email reply:
marladc@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.

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.

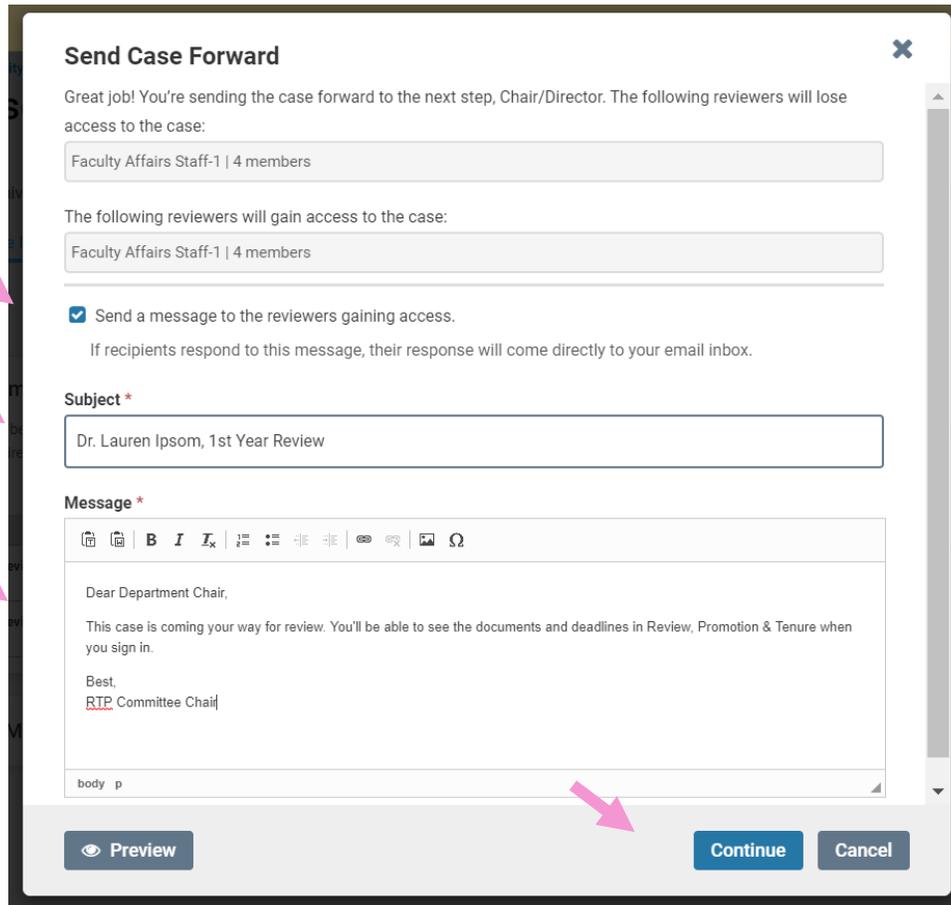
Form Name	Assignee	Actions
RTP Committee Short Review Form 2 required questions	Committee Managers	Manage Respondents
RTP Committee Short Review Form 2 required questions	Maria Garrido-De La Cruz (You)	Edit Submission

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

Send Case ▾

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

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

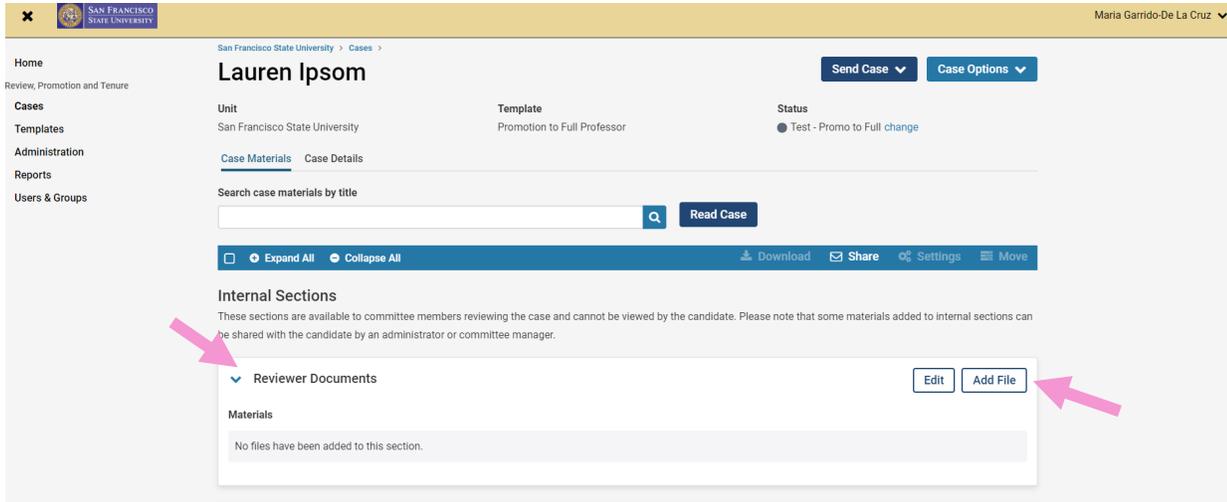
The screenshot shows a 'Send Case Forward' dialog box. It contains a success message, two lists of reviewers (one losing access, one gaining access), a checked checkbox for 'Send a message to the reviewers gaining access', a subject field with 'Dr. Lauren Ipsom, 1st Year Review', and a message field with a pre-filled email body. At the bottom are 'Preview', 'Continue', and 'Cancel' buttons. Three pink arrows point to the subject field, the message field, and the 'Continue' button.

COMPREHENSIVE REVIEW files – 2nd Year, 4th Year, Tenure and/or Promotion

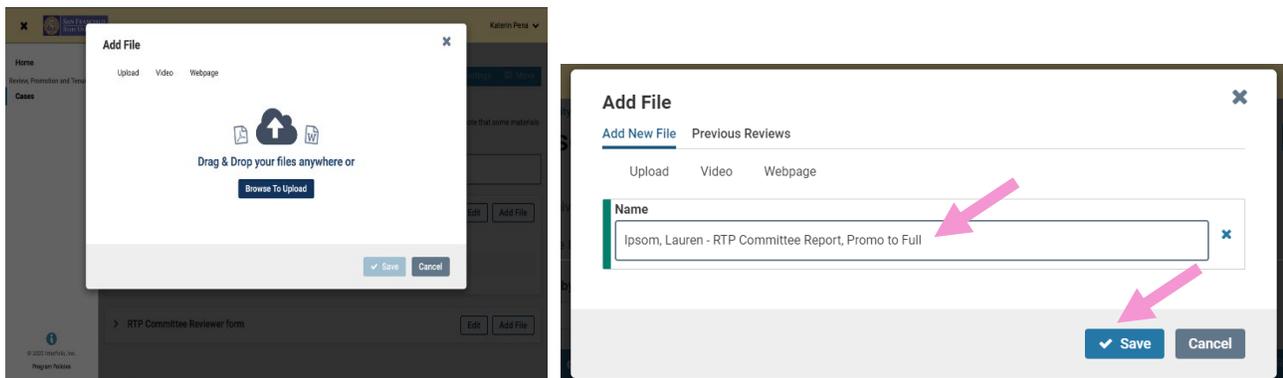
- Step 1: Upload the report to the candidate’s file
- Step 2: Share the uploaded report with the candidate and notify them of review completion
- Step 3: Send the file forward to the next level of review

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.

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

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.

▼ 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	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 [Close]

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]