

Using Interfolio

For TPAC Dossier Preparation
and Annual and Mid-Contract Reviews

August 28, 2024

Matt Wheeler, Office of the Dean of the Faculty



Overview

- Reappointment process
- Annual & Mid-contract Review process
- TPAC Dossiers
- Using Interfolio
- Tips, tricks, resources, and FAQs
- Questions

Reappointments

- Reappointments for regular faculty with academic year appointments due Sept. 15th
- Reappointments require a full, organized TPAC dossier
- Academic year faculty require notice of their reappointment outcome by November 1st, so the turnaround is tight!

Reappointment Workflow in Interfolio

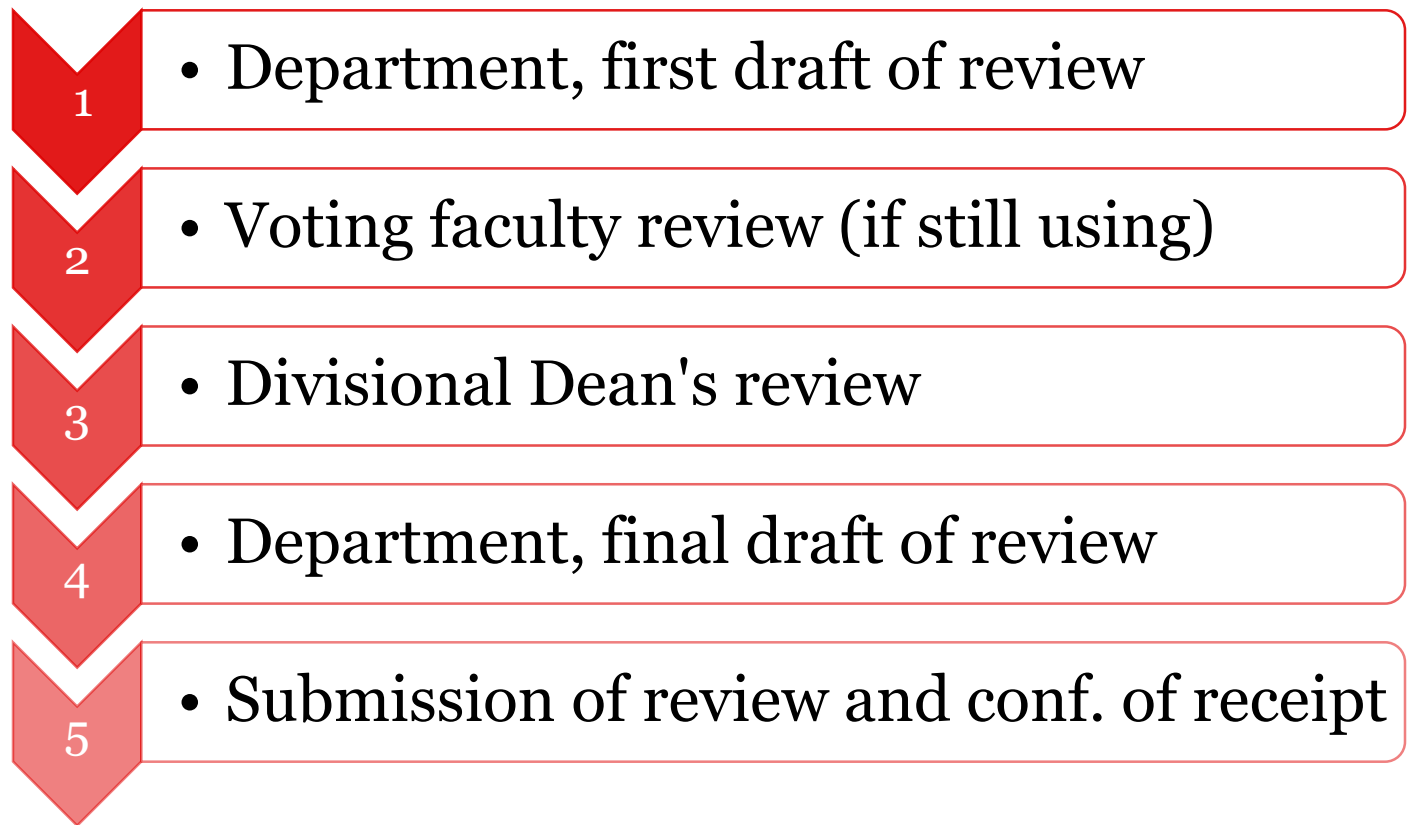
- 1 • Department admin review
- 2 • Voting faculty review (if still using)
- 3 • Divisional Dean's review (for BioMed, SPH)
- 4 • Dean of the Faculty Review
- 5 • TPAC Review
- 6 • Department feedback to candidate
- 7 • Submission of feedback and conf. of receipt

Annual and mid-contract reviews

- First drafts are due to divisional Deans by October 15th
- Reviews do *not* require a full, organized TPAC dossier, not reviewed by TPAC
- All that needs to be in Interfolio is the faculty member's CV, their statement, and the review itself
- Deans will communicate any suggestions for changes to chairs before the feedback is given to the faculty member

Annual Review Workflow in Interfolio

The review process always moves *forward*



TPAC Dossiers

- Dossiers are submitted for reappointments, promotions, and appointments
- 15 sections, some with specific subsections
- Allows for easier, more consistent review by multiple stakeholders (faculty, Deans, TPAC, Provost, President)
- Due to capacity, we can't commit to reading through dossiers before they're sent forward. We are always happy to answer questions and troubleshoot, though!

TPAC Dossiers

TPAC Dossier Preparation Guide

Instructions & Tips:

- Number the documents in the dossier according to the checklist below. Do not re-number the documents— skip those not required.
- Review the document “Submitting a dossier through Interfolio” for instructions on organizing and formatting the dossier
- Do you prefer to see what a well-prepared dossier looks like? Email matthew_wheeler@brown.edu for access to our template dossier

Documents

	Promotion from Assistant to Associate Professor (with tenure)	Promotion from Associate Professor to Professor (tenure previously granted)	Promotion to Senior Lecturer	Promotion to Distinguished Senior Lecturer (DSL)	Promotion to Associate or Full Professor of the Practice or (Research)	Reappointment as Assistant Professor, Lecturer, Senior Lecturer, or DSL	Reappointment (Asst. Assoc or Full) as Professor of the Practice or (Research)	Appointment as Associate Professor or Professor (with or without tenure)	Appointment as Professor of the Practice, Professor (Research), or Senior Lecturer
1. Cover memo	X	X	X	X	x	X	X	X	X
2. Department recommendation , written explanation to the candidate	X	X	X	X	x	X	X	NA	NA
3. Waiver of candidate’s right to a personal appearance before the department	X	X	X	X	x	X	X	NA	NA
4. Department review of scholarship, teaching, and service	X	X	X	X	x	X	X	X	X
5. Information on teaching See below for guidance on Spring 2020 course evals	X	X	X	X	X	X	X	NA	NA
6. Candidate’s current CV	X	X	X	X	X	X	X	X	X
7. Candidate’s statement	X	X	X	X	X	X	X	NA	NA
8. Annual or mid-contract reviews since last action (appointment or reappoint)	X	NA	X	X	NA	X	NA	NA	NA
9. Department correspondence with the selected evaluators	X	X	X	X	X	NA	NA	X	X
10. Letters of evaluation	8	8 ¹	5 ²	5 ³	5	NA	NA	8 ⁴	5
11. Brief biographies of external evaluators	X	X	X	X	X	NA	NA	X	X
12. Minutes of the official meeting in which the department voted on the recommendation	X	X	X	X	X	X	X	X	X
13. Department Standards and Criteria	X	X	X	X	X	X	X	X	X
14. Publications	X	X	X	X	X	X	X	X	X
15. Course Feedback Forms See below for guidance on Spring 2020 course evals	X	X	X	X	X	X	X	X	X



TPAC Dossiers

Brown University > Cases >

Josiah Carberry

Unit: Psychoceramics Template: Tenure Status: Select Status

[Send Case](#) [Case Options](#)

[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. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

Committee Documents [Edit](#) [Add File](#)

Materials

Title	Details	Actions
<input type="checkbox"/> 1. TPAC cover memo	Added by Eva Neczypor Jul 19, 2021	Edit
<input type="checkbox"/> 2. Department recommendation written explanation to candidate	Added by Eva Neczypor Jul 19, 2021	Edit
<input type="checkbox"/> 3. Waiver of candidate's right to appear before the department	Added by Eva Neczypor Nov 7, 2019	Edit
<input type="checkbox"/> 4. Department review	Added by Eva Neczypor Nov 7, 2019	Edit
<input type="checkbox"/> 5. Information on Teaching	Added by Eva Neczypor Aug 4, 2021	Edit
<input type="checkbox"/> 6. Candidate's CV	Added by Eva Neczypor Jul 19, 2021	Edit
<input type="checkbox"/> 7. Candidate's statement	Added by Eva Neczypor Aug 2, 2021	Edit
<input type="checkbox"/> 8. Annual or mid-contract reviews	Added by Eva Neczypor Aug 2, 2021	Edit

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Program Policies

Using Interfolio

Log in with your Brown credentials by going to <https://account.interfolio.com/sso> and selecting Brown University from the dropdown list.



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.

- Brown University**
- Stony Brook University
- University of North Carolina at Pembroke

Search for your institution

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

Don't have an account? Use Interfolio's suite of services to support your academic life.

[Sign Up](#)



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Using Interfolio

When a case is on a workflow step you have access to, you'll see it in a queue in your "Home" tab

The screenshot displays the Interfolio user interface. At the top left, there is a close button (X) and the BROWN logo. At the top right, the user's name 'Matthew Wheeler' is shown with a dropdown arrow. The left sidebar contains a navigation menu with the following items: Home (circled in red), Faculty Search, Positions, Templates, Administration, Reports, Users & Groups, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area is titled 'My Tasks' with a notification badge '2'. It features a search bar and a 'Search' button. Below the search bar, there are two large numbers: '0' for 'Unread Tasks' and '2' for 'Read Tasks'. A table lists tasks with columns for 'Title' and 'Due Date'. The first task is 'Josiah Carberry' with sub-items 'Psychoceramics | Tenure | Tenure'. The second task is 'Your Files Are Ready to Download'.

Using Interfolio

Add new documents to the dossier in the “Committee Documents” section by clicking “Add File”

that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

Committee Documents [Edit](#) [Add File](#)

Materials

Title	Details	Actions
<input type="checkbox"/> 1. TPAC cover memo	Added by Eva Neczypor Jul 19, 2021	Edit
<input type="checkbox"/> 2. Department recommendation written explanation to candidate	Added by Matt Wheeler Sep 29, 2022	Edit
<input type="checkbox"/> 3. Waiver of candidate's right to appear before the department	Added by Eva Neczypor Sep 15, 2021	Edit
<input type="checkbox"/> 4. Department Review	Added by Eva Neczypor Sep 15, 2021	Edit
<input type="checkbox"/> 5. Information on Teaching	Added by Eva Neczypor Aug 4, 2021	Edit
<input type="checkbox"/> 6. Candidate's CV	Added by Eva Neczypor Jul 19, 2021	Edit
<input type="checkbox"/> 7. Candidate's statement	Added by Eva Neczypor Aug 2, 2021	Edit

Note: Candidates cannot see their materials in Interfolio. We do not use the “Candidate Materials” section since all documents are uploaded by the department.

Using Interfolio

Rename documents by clicking Edit > Edit Settings. You may need to refresh to see the updated name.

The screenshot shows the Interfolio interface for a case named "Josiah Carberry". The user is logged in as Matthew Wheeler. The interface includes a sidebar with navigation options like Home, Faculty Search, Positions, Templates, Administration, Reports, Users & Groups, and Review, Promotion and Tenure. The main content area displays the case name, unit (Psychoceramics), template (Tenure), and status (Select Status). There are buttons for "Send Case" and "Case Options". Below this, there are tabs for "Case Materials" and "Case Details". A search bar for case materials is present, along with a "Read Case" button. A toolbar at the bottom of the case materials section includes options for "Expand All", "Collapse All", "Download", "Share", "Settings", and "Move". The "Internal Sections" section is visible, with a note that these sections are available to committee members reviewing the case. At the bottom, there is a section for "Committee Documents" with "Edit" and "Add File" buttons.



Using Interfolio

Reorder documents by simply clicking and dragging them.

☐ 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.

Committee Documents Edit Add File

Materials

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<input type="checkbox"/> 8. Annual or mid-contract reviews	Added by Eva Neczypor Aug 2, 2021	Edit
<input type="checkbox"/> 9. Department correspondence with evaluators	Added by Eva Neczypor Aug 2, 2021	Edit



Using Interfolio

Send a case forward to its next step by clicking “Send Case”

The screenshot shows the Interfolio web interface for a case named "Josiah Carberry". The interface is dark-themed with a sidebar on the left and a main content area on the right. The sidebar contains navigation links: Home, Faculty Search, Positions, Templates, Administration, Reports, Users & Groups, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area displays the case name "Josiah Carberry" and a "Send Case" button. Below the name, there are fields for Unit (Psychoceramics) and Template (Tenure). A "Status" dropdown menu is open, showing "Select Status". Below this, there are tabs for "Case Materials" and "Case Details". A search bar is present with the text "Search case materials by title" and a "Read Case" button. A blue bar contains icons for Expand All, Collapse All, Download, Share, Settings, and Move. The "Internal Sections" section is visible, with a note: "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." Below this, there is a "Committee Documents" section with "Edit" and "Add File" buttons. The footer of the interface includes the Brown University logo and the text "© 2024 Elsevier Inc. Privacy Policy".



Interfolio Roles

Institutional administrators (Anne and Matt)

- Create cases/workflows and view them throughout workflow
- Create and manage users and committees

Case Managers (most dept managers/staff)

- See the cases when at department level
- Add/recuse users to case-specific comm.
- Upload, organize, and delete documents
- Forward the case to the next level

Committee Members (faculty, TPAC members)

- Read cases to which they are given access
- Download case documents as pdfs



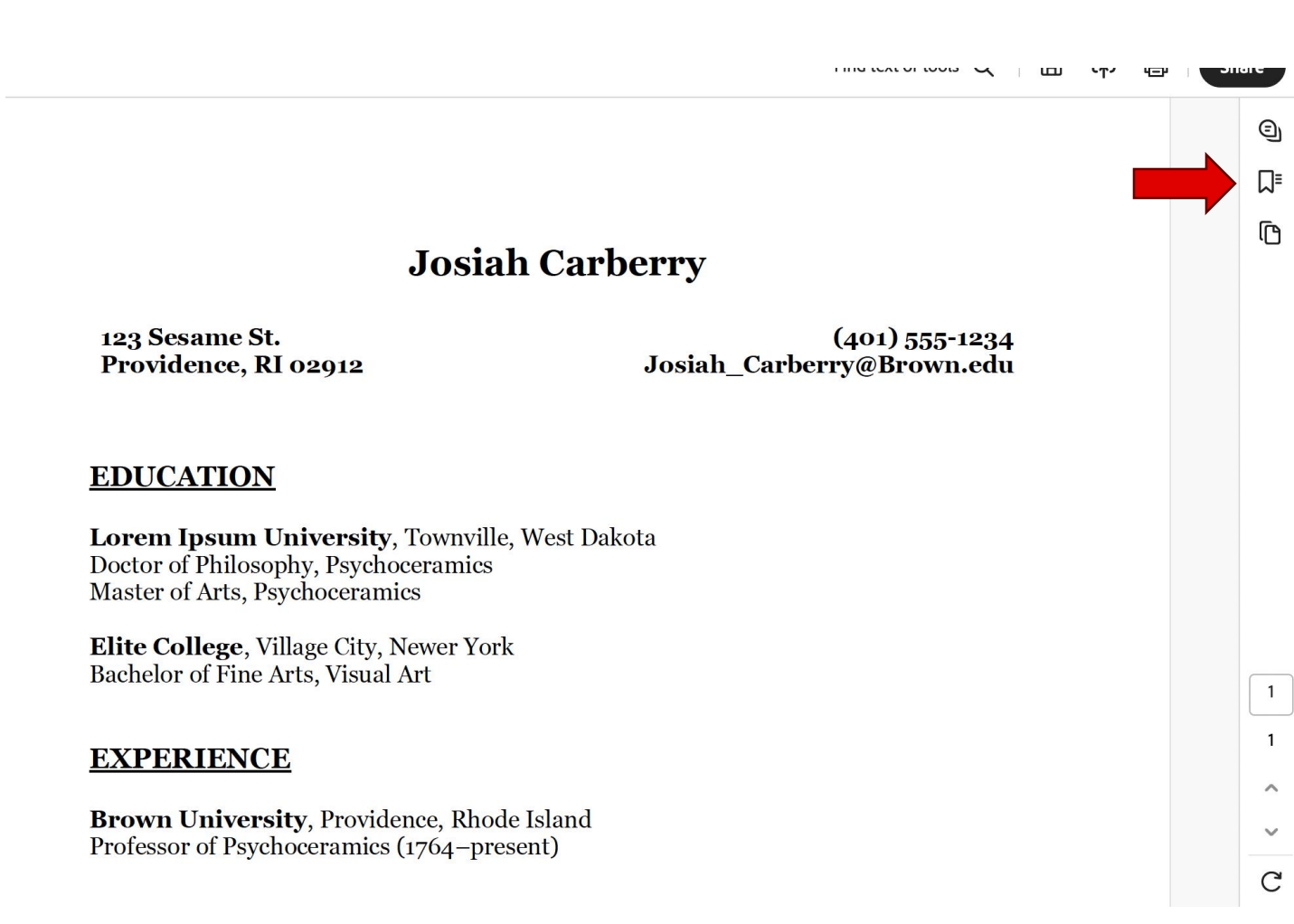
Resources

- The [Tenure and Promotion page](#) on the DOF website contains a number of resources for TPAC cases and reviews (timelines, TPAC dossier prep guide, how to run teaching reports, template letters, etc.)
- The Josiah Carberry case in Interfolio is a sample case that shows you how to organize a dossier and contains helpful information about its components

Bookmarking in Acrobat

- Some TPAC dossier contents, including Information on Teaching, Letters of Evaluation, and Publications, require you add bookmarks in Adobe Acrobat.
- More information on how to bookmark is included in the sample Carberry case, under dossier item #5 (Information on Teaching)
- Please only use “level one” bookmarks—do not nest bookmarks
- Proofread to make sure there are no extraneous bookmarks!

Extraneous Bookmarks



Josiah Carberry

123 Sesame St.
Providence, RI 02912

(401) 555-1234
Josiah_Carberry@Brown.edu

EDUCATION

Lorem Ipsum University, Townville, West Dakota
Doctor of Philosophy, Psychoceramics
Master of Arts, Psychoceramics


Elite College, Village City, Newer York
Bachelor of Fine Arts, Visual Art

EXPERIENCE

Brown University, Providence, Rhode Island
Professor of Psychoceramics (1764–present)

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A standard CV from a faculty member. Looks good, right?



Extraneous Bookmarks

Josiah Carberry

123 Sesame St.
Providence, RI 02912

(401) 555-1234
Josiah_Carberry@B

EDUCATION

Lorem Ipsum University, Townville, West Dakota
Doctor of Philosophy, Psychoceramics
Master of Arts, Psychoceramics

Elite College, Village City, Newer York
Bachelor of Fine Arts, Visual Art

EXPERIENCE

Brown University, Providence, Rhode Island
Professor of Psychoceramics (1764–present)

× Bookmarks

✓ EDUCATION

- Lorem Ipsum University
- Elite College

✓ EXPERIENCE

- Brown University

Nope!
Adobe
picked up
document
headings
and added
bookmarks!

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Things to remember

- Different levels of access & roles for users
- Candidates for review cannot see material
- (Relatively) intuitive to use
- Dossiers are archived and can be accessed in the system by an administrator even after the case is complete

Things to remember

- Always follow the TPAC Dossier Prep Guide for the appropriate faculty action (tenure, reappointment, etc.)
- Maintain the numbering system from the TPAC Dossier Prep Guide, do not re-number dossier items
- Please upload documents in a non-modifiable format (pdf)
- After uploading documents, click the “Read” button and see what they look like! This is how TPAC will view them.

Things to remember

- Double check your PDF bookmarks in Acrobat before uploading
- ALL reappointments and ALL actions involving lecturers should have an end date on the cover memo
- Please ensure right to appear/waiver notifications are timely

And one more thing to remember...

You are not alone!

We are here to help you throughout the year.



Office Hours

Matt will be holding virtual office hours ahead of the reappointment deadline for questions and live support:

Wednesday, Sept. 4, 10:00am–12:00pm

Thursday, Sept 12, 11:00am–1:00pm

Zoom link to follow

Questions?

Thank you!

Matthew_Wheeler@Brown.edu

