# Using Interfolio

## For TPAC Dossier Preparation
## and Annual and Mid-Contract Reviews

August 28, 2024

Matt Wheeler, Office of the Dean of the Faculty

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# Overview

- Reappointment process

- Annual & Mid-contract Review process

- TPAC Dossiers

- Using Interfolio

- Tips, tricks, resources, and FAQs

- Questions

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# 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 1$^{st}$, so the turnaround is tight!
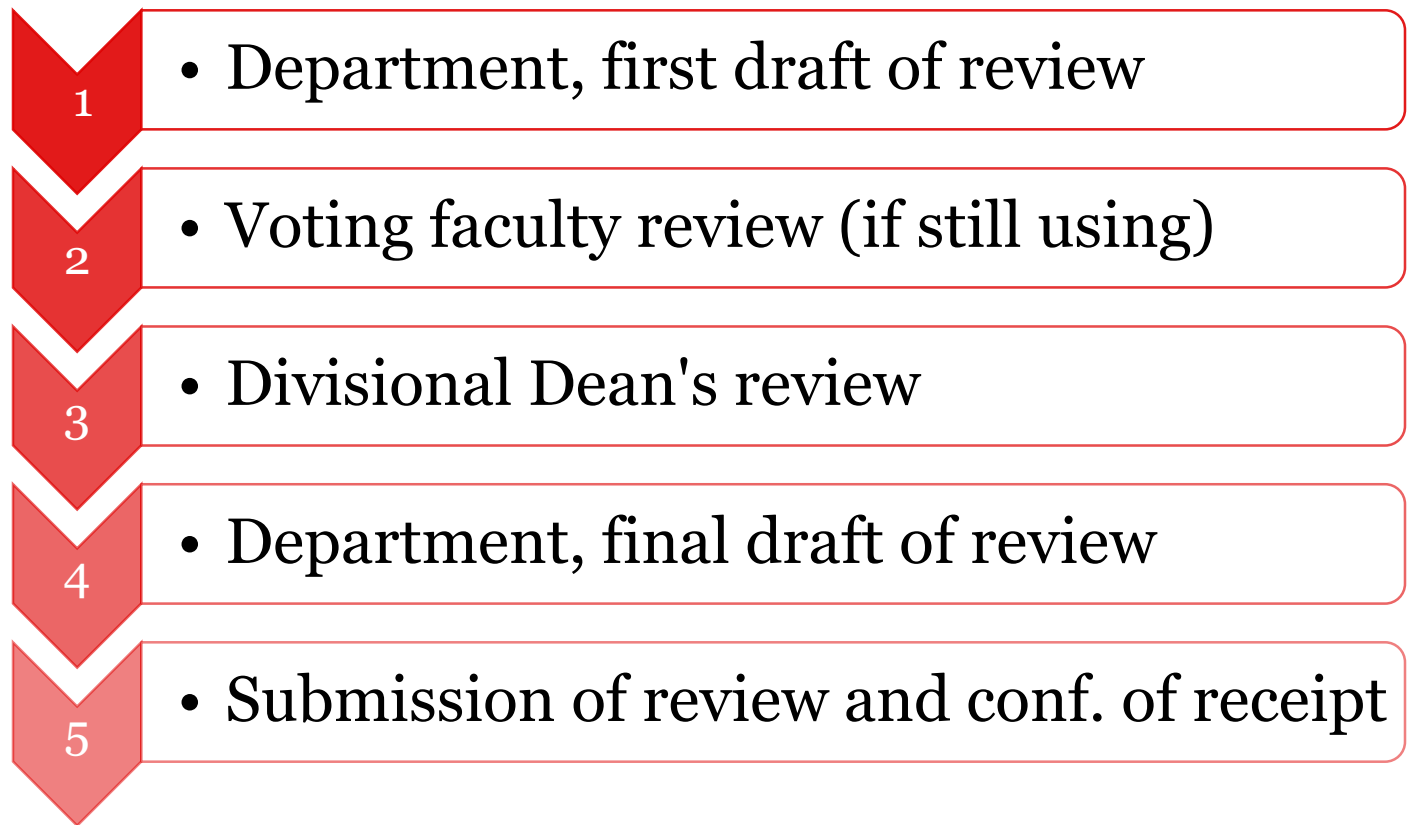
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# Reappointment Workflow in Interfolio

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

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# 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

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# Annual Review Workflow in Interfolio

The review process always moves *forward*

1 • Department, first draft of review

2 • Voting faculty review (if still using)

3 • Divisional Dean's review

4 • Department, final draft of review

5 • Submission of review and conf. of receipt

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# 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!

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# 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 |

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# TPAC Dossiers

# Using Interfolio

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

# 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

# Using Interfolio

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



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.

# Using Interfolio

Reorder documents by simply clicking and dragging them.

# Using Interfolio

Send a case forward to its next step by clicking "Send Case"

# 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

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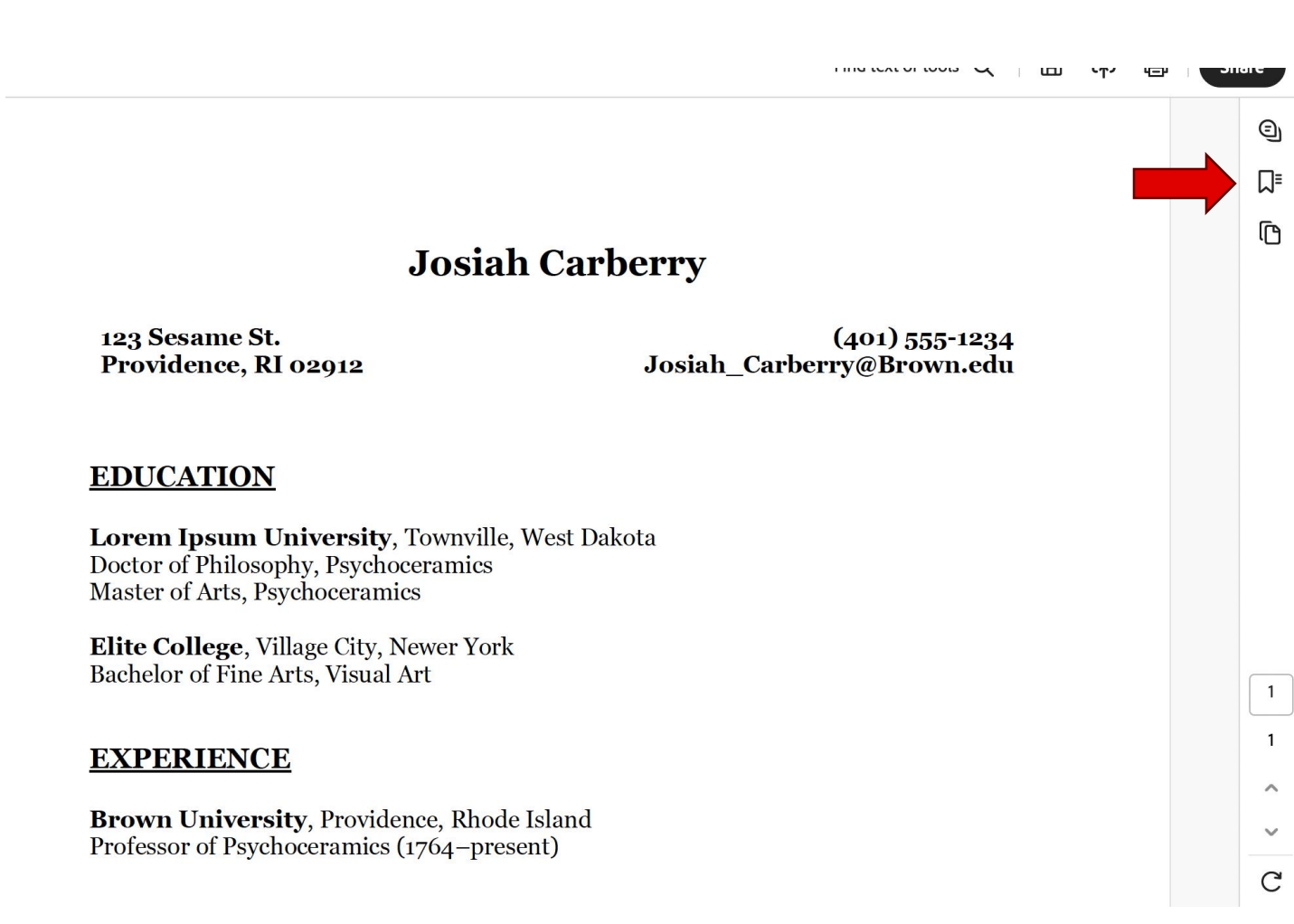
# Resources

- 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

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# 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!

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# Extraneous Bookmarks

Josiah Carberry

123 Sesame St.                                    (401) 555-1234
Providence, RI 02912              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)

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

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# Extraneous Bookmarks

# 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

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# 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.

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# 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

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# And one more thing to remember…

## You are not alone!

We are here to help you throughout the year.

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# 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

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# Questions?

Thank you!

Matthew_Wheeler@Brown.edu

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