

Submitting a dossier through Interfolio

Do you prefer to see what a well-prepared dossier looks like, rather than reading this document? Email matthew_wheeler@brown.edu and he will give you access to our template dossier

All Tenure, Promotions, and Appointments Committee (TPAC) dossiers must be submitted through Interfolio Promotion and Tenure. Below are instructions for submitting material. We anticipate that these instructions will be updated as Interfolio develops new functionalities.

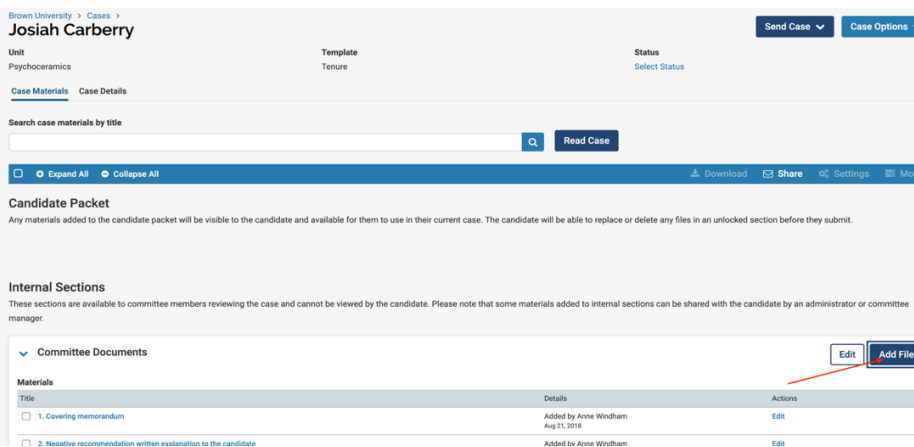
Preparing the dossier

- Review the information on the Dean of the Faculty's Tenure and Promotion webpage (<https://dof.brown.edu/tenure-promotion>). Use the **TPAC Dossier Preparation Guide** (a pdf link on the webpage) to determine what documents will be required for each type of faculty action. Make sure to read the very helpful **Instructions for creating teaching reports** document!
- Ideally, each component of the dossier should include only one document. For example, #10. Letters of Recommendation should be a single pdf that includes all of the letters, not individual files.
Helpful Tip: If you bookmark* each letter of recommendation in the pdf with the letter writer's last name and institution, that helps TPAC when reviewing the case. For example: "Smith, Harvard" "Jones, UCLA". It is also helpful to bookmark #14 Publications and #15 Course Evaluations, if you have many pages in either document.
- **Helpful tip:** While it is possible to upload different types of documents, including Excel, Word, and PDFs, PDFs are the quickest to upload.

*see last page for instructions on bookmarking documents

Uploading the dossier

- Sign in to Interfolio (www.interfolio.com). On the landing page, you will see your candidate(s) names. Click on the name of the candidate, which will take you to the page where you can add documents.
- Click "Add File" in the Committee Documents section (see illustration below) and a pop-up screen will allow you to upload the document. For the document name, always enter the checklist number first (for example, "6. CV"). Don't forget to save the document before closing out of this view.



- When you have uploaded all the documents, you can re-order them by clicking and dragging them into place. The new order will save automatically. You can also delete and replace documents.

Helpful tip: Note that you can only delete those things that you have uploaded, you cannot delete something someone else has uploaded. Contact Anne Windham or Matt Wheeler if you need to delete something that was added by another person.

- **Helpful tip:** Once you have uploaded all of the material, be sure to preview it in the Read view (click on Read Case, see illustration below). This is how TPAC sees the material. Check that all pages are legible and in order—particularly make sure the tabular summary of teaching (in section #5, Information on Teaching) is clear and that the columns have not broken up over a number of pages. If that happened, read the **Instructions for creating teaching reports** on the Tenure and Promotion page and re-run the report!

The screenshot shows the Interfolio interface for a case titled "Josiah Carberry". At the top right, there are buttons for "Send Case" and "Case Options". Below the case title, there are tabs for "Case Materials" and "Case Details". A search bar is present with a "Read Case" button circled in red. Below the search bar, there are options to "Expand All" or "Collapse All", and buttons for "Download", "Share", "Settings", and "Move". The "Candidate Packet" section contains a note about visibility. The "Internal Sections" section contains a note about committee access. At the bottom, there is a "Committee Documents" section with "Edit" and "Add File" buttons. Below that is a table of materials.

Title	Details	Actions
<input type="checkbox"/> 1. Covering memorandum	Added by Anne Windham Aug 21, 2018	Edit

- Once the case is complete, click the Send Case button. The Pop-up screen will show what committee is receiving the case next, and you have the option to send it forward with or without a message (see illustration, next page). We advise that you not use the messaging feature in Interfolio. Your faculty are more likely to recognize and respond to an email that is directly from you, and it's also possible that an Interfolio email will go to their spam account.

Send Case Forward ✕

Great job! You're sending the case forward to the next step, CFED review. The following reviewers will lose access to the case:

Psychoceramics admin | 4 members

The following reviewers will gain access to the case:

CFED | 9 members

Send a message to the reviewers gaining access.
 If recipients respond to this message, their response will come directly to your email inbox.

Click this button and you can forward the case without having to send an email message to the next committee

Subject *

Message Subject

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,
Anne Windham

Preview
Continue
Cancel

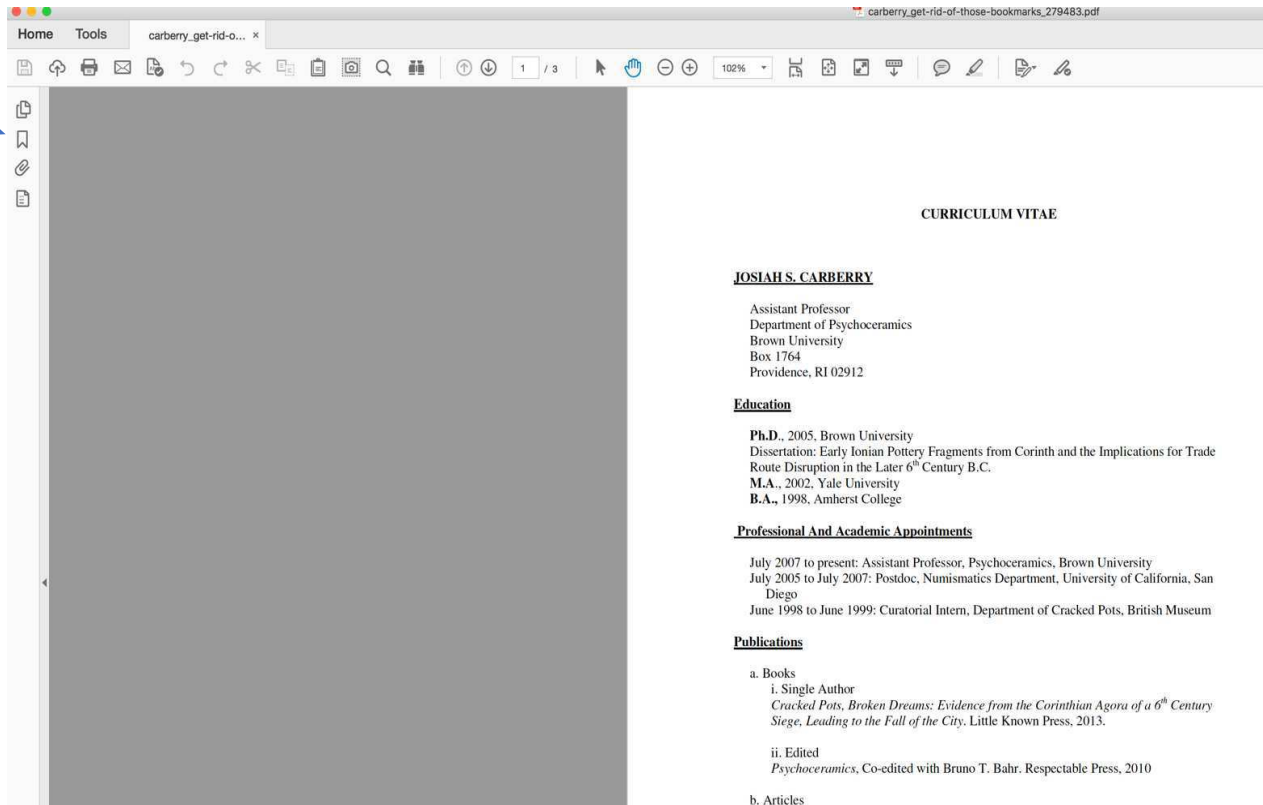
- Sending forward cuts off your access to the case (it will disappear from your home page) unless you are also a member of the committee that is receiving the dossier. If you need to add or change something after you have submitted it, just ask us and we can restore your access!

Questions? Contact: Anne Windham, anne_windham@brown.edu
 Matt Wheeler, matthew_wheeler@brown.edu

Instructions on bookmarking documents are on the next page ⇒

How to add or remove bookmarks:

You need Adobe Acrobat to create or delete bookmarks. When you open the document in Acrobat, you will see a navigation pane on the left if the document has active bookmarks. The ribbon icon is the bookmark button. When you click on that ...



... you will see the bookmarks. To remove the bookmarks, click on the trash can icon. To add them, click on the icon to the right of the trashcan (the ribbon with a +)

