


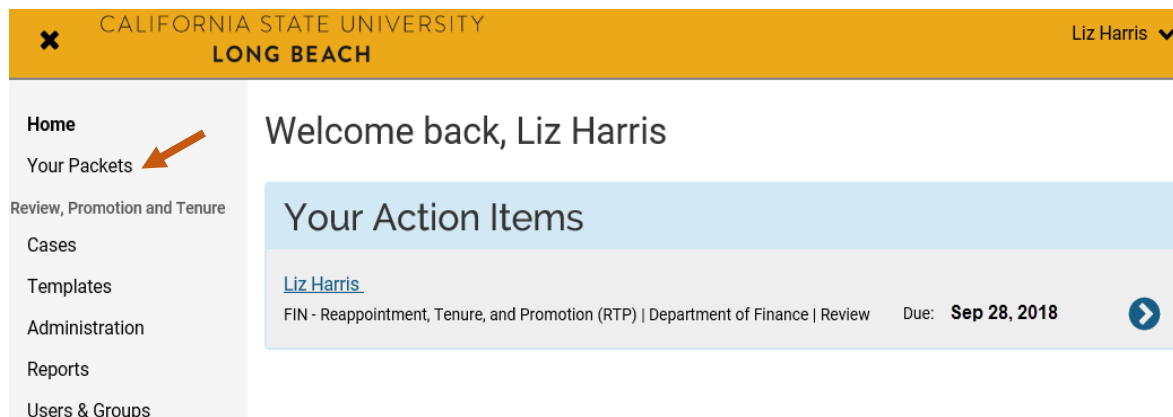
CANDIDATE'S QUICK REFERENCE GUIDE TO INTERFOLIO

How Do I Access Interfolio?

Interfolio is available via CSULB's Single Sign-On at <https://csulb.okta.com>. Simply log in with your CSULB credentials AND click on the  interfolio chiclet.

How Do I Access My Packet?

To access your packet, locate the menu on the left and click **Your Packets**.



The screenshot shows the top navigation bar of the Interfolio interface for California State University Long Beach. The user is Liz Harris. The left sidebar menu includes: Home, Your Packets (highlighted with an orange arrow), Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area displays a welcome message and a section titled 'Your Action Items' with a link to 'Liz Harris' and a due date of 'Sep 28, 2018' for 'FIN - Reappointment, Tenure, and Promotion (RTP) | Department of Finance | Review'.

In the **Active** section, click the [link](#) to your packet for the current review cycle.

Your Packets

Active

Packet	Type	Status	Due Date	
American Indian Studies Program AIS - Reappointment, Tenure, and Promotion (RTP)	Review	Not Submitted	Case due Sep 28, 2018	View

Completed

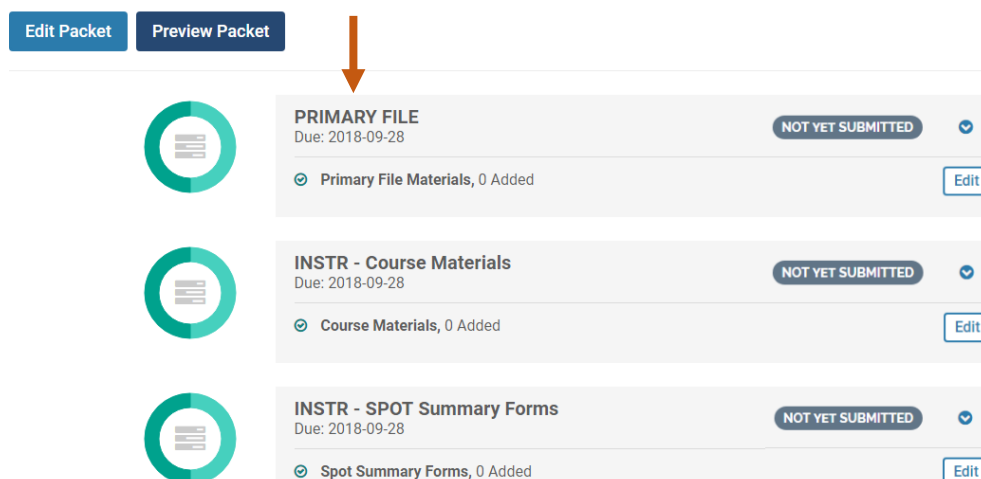
Packet	Type	Responded	Completed	
American Indian Studies Program AIS - Reappointment, Tenure, and Promotion (RTP)	Review		June 30, 2018	View

An overview of your packet requirements will display.

Overview

Liz Harris

Below you will find an overview of the packet requirements outlined by your institution.



The screenshot shows the 'Overview' page for Liz Harris. It includes buttons for 'Edit Packet' and 'Preview Packet'. Below these are three requirement cards, each with a circular progress indicator and an 'Edit' button. The first card, 'PRIMARY FILE', is highlighted with an orange arrow and shows 'Due: 2018-09-28', 'NOT YET SUBMITTED', and 'Primary File Materials, 0 Added'. The second card, 'INSTR - Course Materials', also shows 'Due: 2018-09-28', 'NOT YET SUBMITTED', and 'Course Materials, 0 Added'. The third card, 'INSTR - SPOT Summary Forms', shows 'Due: 2018-09-28', 'NOT YET SUBMITTED', and 'Spot Summary Forms, 0 Added'.

How Do I Upload Materials to My Packet?

To upload materials to your Packet, click **Edit Packet**.

Overview

Liz Harris

Below you will find an overview of the packet requirements outlined by your institution.

Edit Packet

Preview Packet



PRIMARY FILE

Due: 2018-09-28

NOT YET SUBMITTED



✓ Primary File Materials, 0 Added

Edit

Locate the appropriate packet section for the materials and click **+ Add File**.

California State University-Long Beach > Overview >

Packet Requirements

Liz Harris

View Packet Instructions

PRIMARY FILE

Due: Sep 28, 2018

Primary File Requirements:

- Candidate Status Sheet
- Professional Data Sheet
- Narrative
- Curriculum Vitae (if required by College RTP Policy)
- Academic Advisor Form (if required by College RTP Policy)
- Workload Assignment Form
- Index of Supplemental Materials

COMPLETE

0 / 1 OPTIONAL

○ Primary File Materials

Optional

+ Add File

A. Upload New Materials

To upload new materials:

1. Click the **Add New File** tab
2. Select **Upload***
3. Use **"Drag & Drop"** or click **Browse To Upload** to add one or more files to your packet
4. Click **+ Add**.

*To add a link to a video or webpage, select the Video or Webpage tab.

Add Primary File Materials

Optional

Choose Existing **Add New File**

Upload

Video

Webpage



Drag & Drop your files anywhere or

Browse To Upload

+ Add

Cancel

CANDIDATE'S QUICK REFERENCE GUIDE TO INTERFOLIO (continued)

B. Add From Dossier*

*Interfolio's free, cloud based storage tool

To add materials from Interfolio's **Dossier**:

1. Navigate to the **Choose Existing** tab
2. Select one or more materials to upload from either **Dossier's All Materials** or **Collections**
3. Click **+ Add**.

Add Primary File Materials

Optional

Choose Existing

Add New File

All Materials

Collections

Packets

Search



Filter

☐ All

☒ **CANDIDATE_STATUS_SHEET**

☐ CS&LB Animation Reel v2

☐ CURRICULUM_VITAE_2017-18

☒ CURRICULUM_VITAE_2018-19

☐ Narrative_1617

☐ Professional Data Sheet_1617

☐ PROFESSIONAL_DATA_SHEET

☐ S16 SPOT EVAL

+ Add

Cancel

C. Add From A Prior Packet

To add materials from a prior packet:

1. Navigate to the **Choose Existing** tab
2. Select **Packets**
3. Select the **link** to the packet
4. Select one or more materials to upload to your new packet,
5. Click **+ Add**.

Add Primary File Materials

Optional

Choose Existing

Add New File

All Materials

Collections

Packets

Select a packet to view and add file(s) from that review.

Packet	Type	Completed
American Indian Studies Program	Review	Aug 30, 2016
AIS - Reappointment, Tenure, and Promotion (RTP)		
American Indian Studies Program	Review	Aug 31, 2017
AIS - Reappointment, Tenure, and Promotion (RTP)		

+ Add

Cancel

How Do I Rename A Document?

To rename a document in your packet, click **Edit**,

NARRATIVE	Aug 16, 2017	Edit	
CV_Resume_07.15	Aug 15, 2018	Edit	

Overwrite the existing document title with a new title and click **✓ Save**.

Edit Document



Document Title *

Curriculum Vitae




Replace

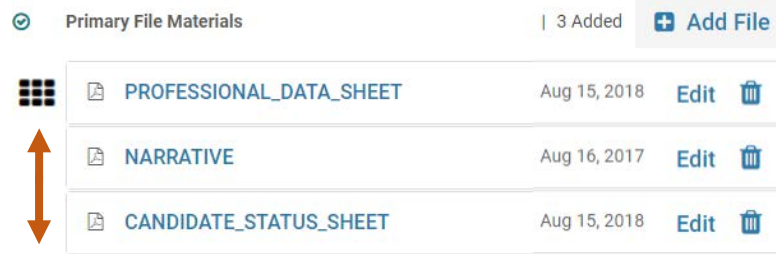
✓ Save

Cancel








CANDIDATE'S QUICK REFERENCE GUIDE TO INTERFOLIO (continued)

How Do I Reorder My Materials Within A Section?


To reorder materials within a section, position your cursor to the left of the document over the  tile, and drag the file(s) to reorder.



Primary File Materials | 3 Added [Add File](#)

	 PROFESSIONAL_DATA_SHEET	Aug 15, 2018	Edit	
	 NARRATIVE	Aug 16, 2017	Edit	
	 CANDIDATE_STATUS_SHEET	Aug 15, 2018	Edit	

How Do I Remove A Document From My Packet?

To remove a document from your packet, locate and click the .



 NARRATIVE	Aug 16, 2017	Edit	
 Draft1_Narrative	Aug 15, 2018	Edit	

Click **Yes** to confirm removal of the document from your packet.

Confirm



Are you sure you wish to remove this requirement?

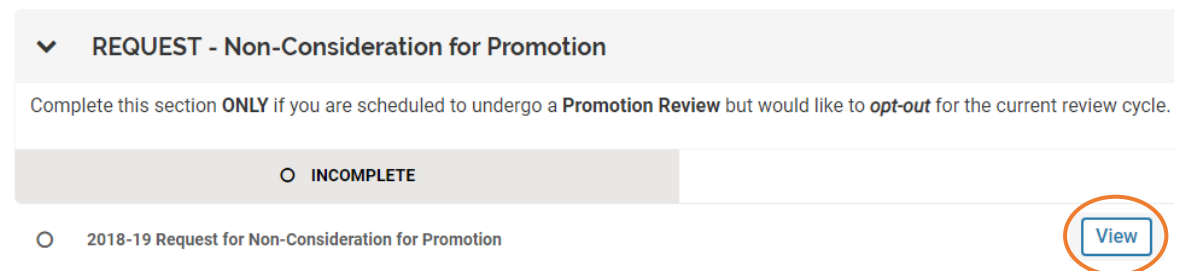
Yes

No

How Do I Request Non-Consideration for Promotion?

PLEASE NOTE: If you opt-out of a Promotion review, any required reviews (i.e., Tenure, ETF) will proceed as scheduled.

If you are scheduled to undergo a Promotion Review but would like to **opt-out**, scroll to the **Request for Non-Consideration for Promotion** section of your packet and click [View](#).



✓ REQUEST - Non-Consideration for Promotion

Complete this section **ONLY** if you are scheduled to undergo a **Promotion Review** but would like to **opt-out** for the current review cycle.

○ INCOMPLETE

○ 2018-19 Request for Non-Consideration for Promotion [View](#)

Click the checkbox to request non-consideration and click [Return to Packet](#).

California State University-Long Beach > Overview > Requirements >

2018-19 Request for Non-Consideration for Promotion

Liz Harris

You are currently schedule to undergo a promotion review during the 2018-19 RTP Review Cycle.
If you do NOT wish to be considered for promotion during the 2018-19 RTP Review Cycle, please respond below by August 30, 2018.

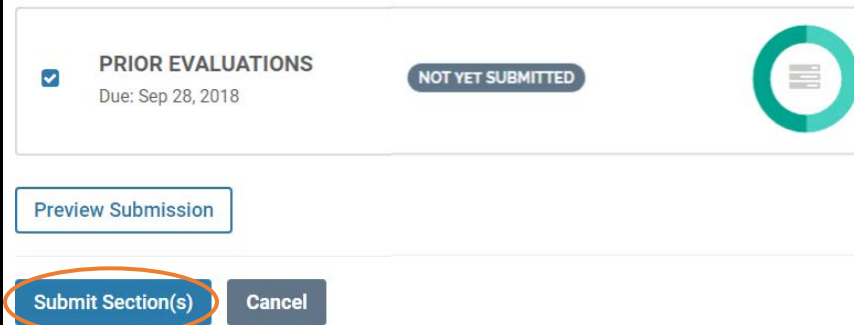
☒ I hereby request NOT to be considered for promotion during the 2018-19 RTP Review Cycle.

[Return to Packet](#)

PLEASE NOTE: You must submit your packet or your request for non-consideration will not be received.

How Do I Submit My Packet?

Once you have verified via the preview that all required materials have been added to your packet, submit all packet sections by clicking [Submit Section\(s\)](#).



How Do I Access My Evaluation?

At each review level, on the notification deadline, your evaluation will be available in Interfolio for your review, with an opportunity to respond or rebut within the standard 10 calendar day period.

To access your evaluation, navigate to your packet, and click on **Committee Files**.

Overview

Liz Harris

[Committee Files](#)

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward submitting your packet.

[Edit Packet](#)

[Preview Packet](#)



PRIMARY FILE
Due: 2018-09-28

LOCKED

SUBMITTED SEP 4, 2018



Then click [View](#).

California State University-Long Beach > Overview >

Committee Files

[Actions](#) ▼

Below you will see files that have been sent to you by committee members.



CANDIDATE'S QUICK REFERENCE GUIDE TO INTERFOLIO (continued)

How Do I Respond To An Evaluation?

The deadline to respond or rebut is 10 calendar days from the notification deadline at each level of review. Here are links to these deadlines:

[MINI Deadlines](#)

[RTP Deadlines](#)

[ETF Deadlines](#)

To respond to your evaluation, click **Send Response**.

[California State University-Long Beach](#) > [Overview](#) >

Committee Files

Actions ▾

Below you will see files that have been sent to you by committee members.

View

Dept Evaluation 18-19

Copy to Dossier | Download

Response Requested

Due: Nov 19, 2018

Send Response

1. Enter a **Title**, preferably referencing the review to which you are responding.
(i.e., Rebuttal-Dept Committee Evaluation)
2. Click **Browse To Upload** or use "Drag & Drop" to upload your response or rebuttal.
3. Click **Send**.

Response

You can respond with a document for the committee to review.

Title *

Rebuttal - Dept Committee Evaluation



Drag & Drop your files anywhere or

Browse To Upload

Send

Cancel

How Do I Download My Evaluation?

To download your evaluation, click **Download**.

[California State University-Long Beach](#) > [Overview](#) >

Committee Files

Actions ▾

Below you will see files that have been sent to you by committee members.

View

Dept Evaluation 18-19

Copy to Dossier | **Download**

Technical Questions?

A link to **Product Help** is located on your Interfolio Dashboard. Interfolio can also be contacted directly at help@interfolio.com or (877) 997-8807. If you need further assistance, please contact Amy Lau in Faculty Affairs at Amy.Lau@csulb.edu or 562.985.2624 or Liz Harris at liz.harris@csulb.edu or 562.985.1764.