interfolio

Review, Promotion & Tenure - Bard College

Committee Member & Manager Training

Agenda

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- Interfolio Key Concepts
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      - Annotations
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  - Review Case Materials
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- How to Find Support
- Bard College Process-related updates
- Questions

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What is Interfolio Review, Promotion & Tenure?

Interfolio Review, Promotion & Tenure is an online system for carrying out formal faculty reviews in a shared governance context (including tenure, promotion, annual review, sabbatical/leave, merit review, and any other sequential review), built to help academic institutions ensure that these processes are transparent, equitable, efficient, and well documented.

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Why Interfolio?

What is changing? The College will no longer use Google as a platform for sharing evaluation materials. The Office of the Dean of the College will continue to facilitate all faculty evaluations using Interfolio in accordance with the evaluation process and procedures as outlined in the Faculty Handbook.

Where will the Interfolio resources be posted? Website links for Interfolio resources will be found on the Office of the Dean of the College website on the "Governance" page under "Faculty Evaluations"

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Key Concepts

Review, Promotion & Tenure	An Interfolio module used to facilitate the review process anytime a candidate submits materials that one or a series of committees needs to review or approve.
Cases	Lifecycle of a candidate as they progress through a standardized review cycle. Committees have the ability to add a case analysis or evaluation to the case as it progresses through the workflow leading up to the final decision.
Packet	The collection of materials by which a candidate is being reviewed (documents and other files). The packet is divided into sections which can be worked on and submitted independently of one another. All materials submitted in the packet will be copied to the candidates Dossier for record keeping.
Committees	Groups of users that can review the candidates case at a given step of the review process. Committees can be: Standing (managed from the central committee tab), Ad Hoc (case specific) or individual assignment (committee of one).
Dossier	Tool for all faculty to store and manage job, fellowship, and promotion documents in one place. The Dossier will act as the central archiving tool for candidate materials. All information submitted for a review will be copied into the faculty Dossier for archiving or reusability purposes.

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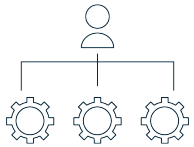
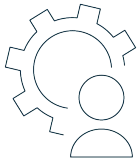
Review, Promotion & Tenure: User Roles

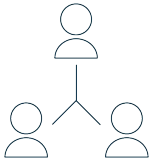


Administrators can access documents, reports, e-mail candidates and committees, and move a case forward or backward. Administrators can create and edit templates, forms, and cases for the units to which they have access.

Committee Managers are assigned to a specific committee or step. They can review a candidate, move a case forward or backward, and communicate with both candidate and committee members from within the system.



Committee Members have the most basic permissions within the system. They can view a candidate's packet, download documents (if allowed), and leave comments (also if allowed) on the particular case they have access to.



Candidates complete a packet with their documents and other files to submit for review. They may also be asked to respond to shared documents or submit additional materials during the process.

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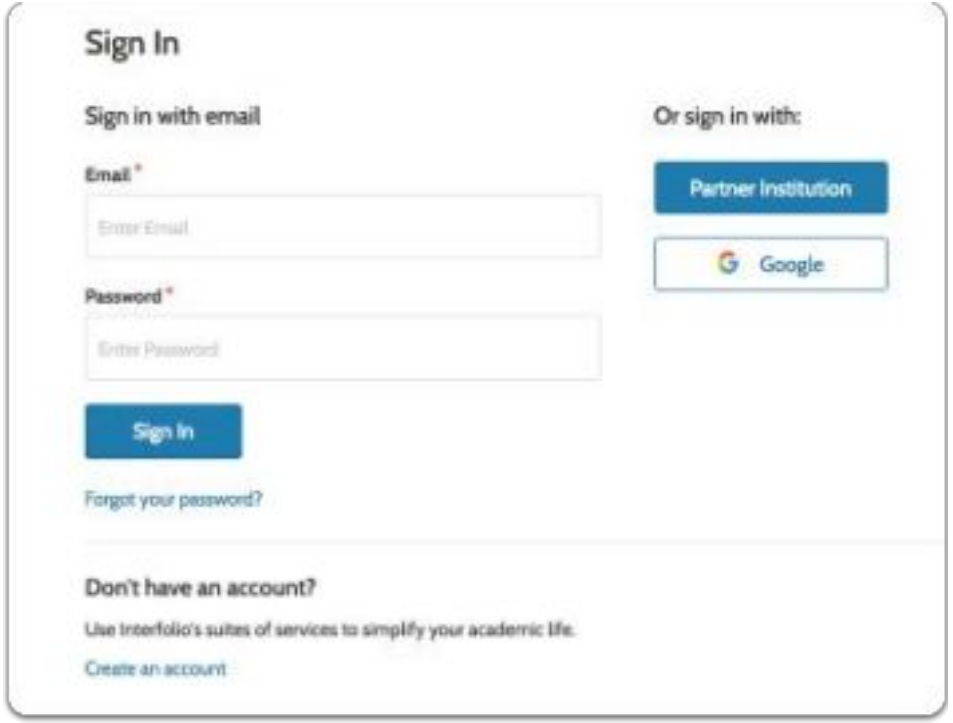
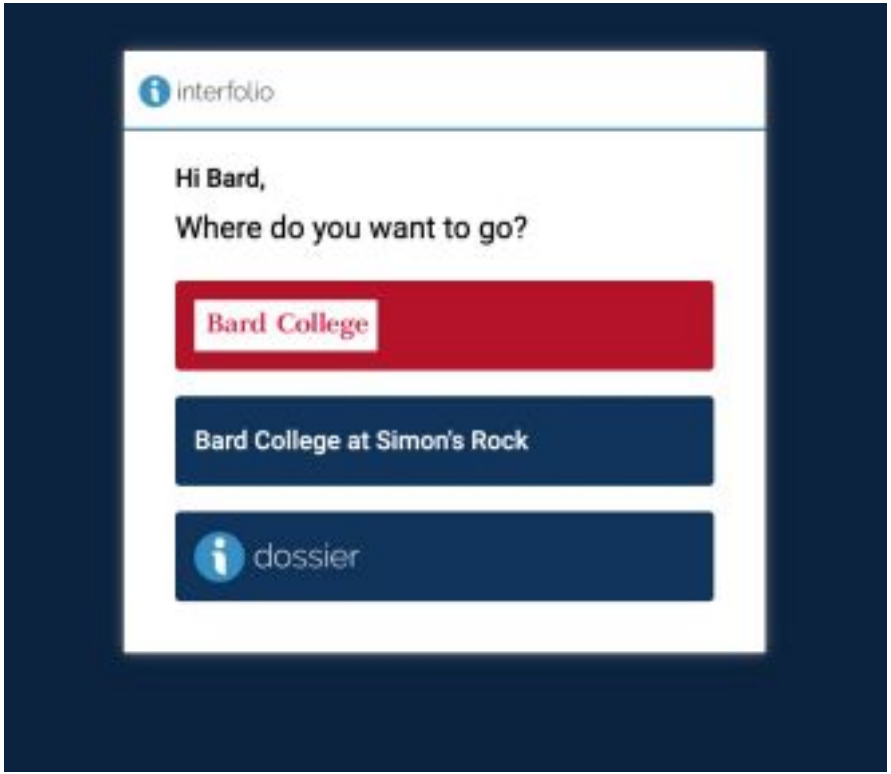
Logging into the Product





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Demonstration

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Interfolio Pro Tips/ Universal Practices

- Preferred Browsers: Google Chrome and Mozilla Firefox
- Ensure you are always using an up-to-date browser
- Required fields are indicated by the asterisks. You must complete all required fields in a specific section before you can save your work.

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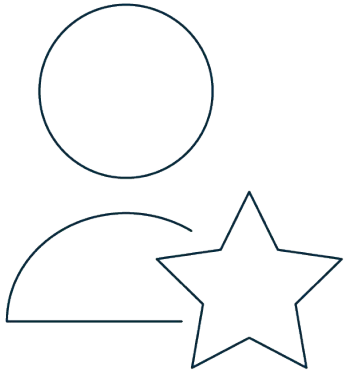
Interfolio Resources

Product Help Center
Quick help articles to guide you through specific tasks and functionality while using the product
product-help.interfolio.com

Scholar Services
Call, email, or chat with our Scholar Services team
Phone: **(877) 997-8807, 9am - 6pm EST**
Email: **help@interfolio.com**



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Bard College Process updates & Questions

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