

# Interfolio RPT Processes and Policies

This document shows the process for completing review, promotion, and tenure tasks using Interfolio RPT. It has policies regarding using Interfolio RPT. The guidelines and policies apply to the review, promotion, tenure cases, and reviewing cases for the Summer Research Stipend, Faculty Development Leave Program, Intra-University Visiting Fellowship, and Interdisciplinary Curricular Fellowship. Questions? Contact [Interfolio@luc.edu](mailto:Interfolio@luc.edu).

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## Interfolio RPT Policies

Interfolio RPT duties and responsibilities for academic units and the Office of Faculty Affairs.

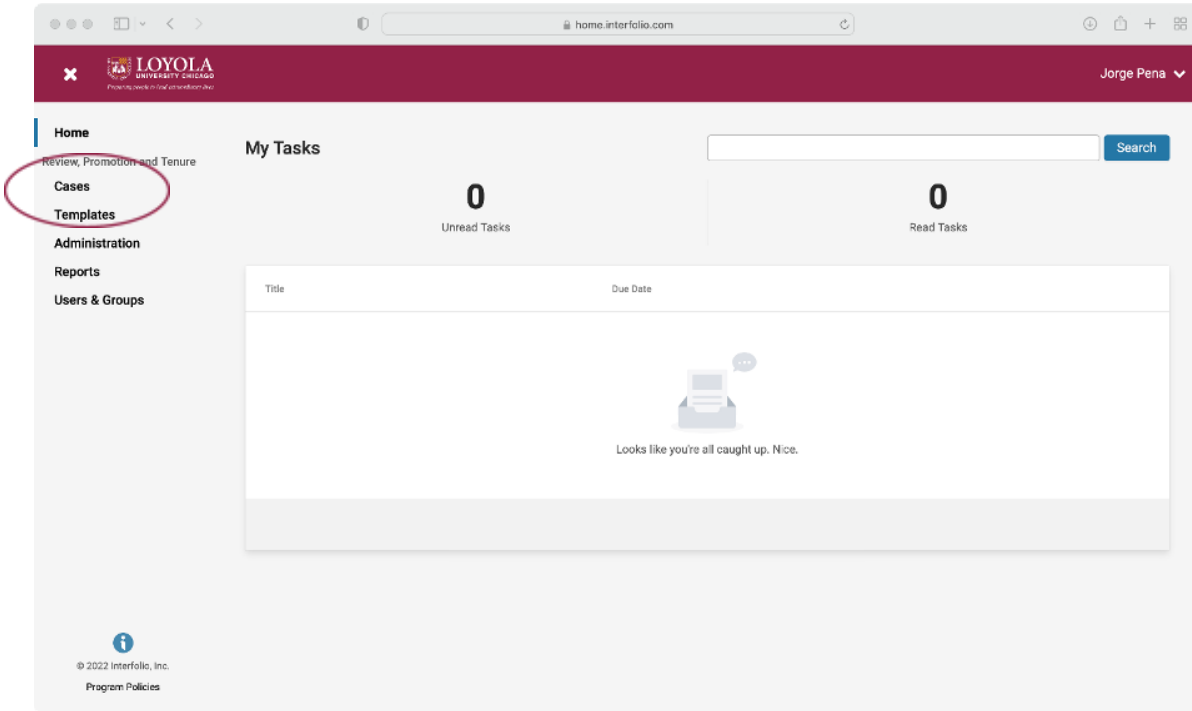
Academic Unit Responsibilities	Faculty Affairs Responsibilities
<ol style="list-style-type: none"> <li>1. <b>Add new users</b> to Interfolio RPT</li> <li>2. <b>Upload promotion and tenure guidelines</b> to the Academic Unit Home Launch step*</li> <li>3. <b>Add members</b> to the Academic Unit Home Launch, Department review committee, school review committee, and Dean review steps</li> <li>4. <b>Identify the chair</b> of a committee using the star function</li> <li>5. <b>Upload review letters</b> from the department chair, department review committee (if applicable), school review committee, and dean</li> <li>6. <b>Advance cases</b> from the Academic Unit home launch step until the Faculty Affairs step.</li> <li>7. <b>Inform</b> Faculty Affairs of cases to be closed.</li> </ol>	<ol style="list-style-type: none"> <li>1. Create cases for review, promotion, or tenure</li> <li>2. Add case review steps</li> <li>3. Delete case review steps</li> <li>4. Create templates:               <ol style="list-style-type: none"> <li>a. Tenure Track review, promotion, and tenure</li> <li>b. Clinical/Lecturer Track review and promotion</li> <li>c. Endowed Chairs</li> <li>d. Expedited Reviews</li> <li>e. Adjunct Lecturers/Instructors</li> </ol> </li> <li>5. Edit templates</li> <li>6. Close cases</li> <li>7. Provide technical support to academic units</li> </ol>

\*Do not delete case review steps from cases or templates. Contact Faculty Affairs ([Interfolio@luc.edu](mailto:Interfolio@luc.edu)) to edit case review steps or ask questions.

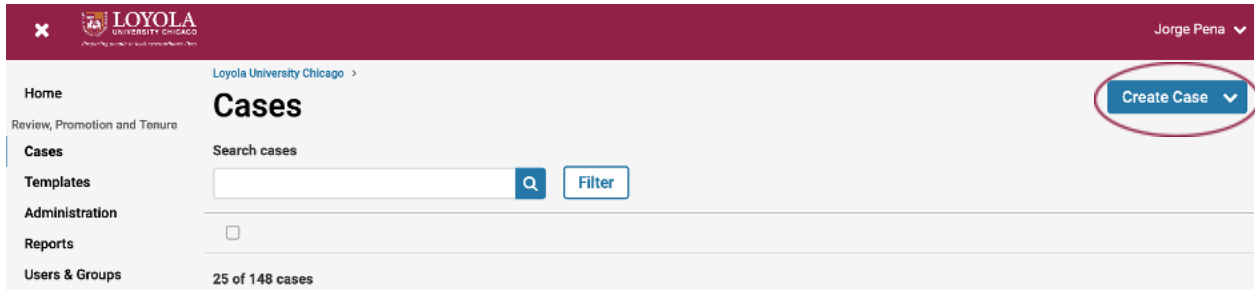
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# Create cases

## Step 1. Click on the Cases tab



## Step 2. Click the Create Case button



- Step 3. a) Search for the candidate by name in the search bar.
- b) Choose “Yes, the candidate will be involved during the case.”
- c) Select the academic unit.

### Add New Case



Search for a Candidate \*

Selected Candidate \*

The candidate information will display here once they are selected.

Will the candidate be involved in this evaluation? \*

This setting cannot be changed after this step. [Learn more about candidate involvement.](#)

- Yes, the candidate will be involved during the case.
- No

Unit for Case \*

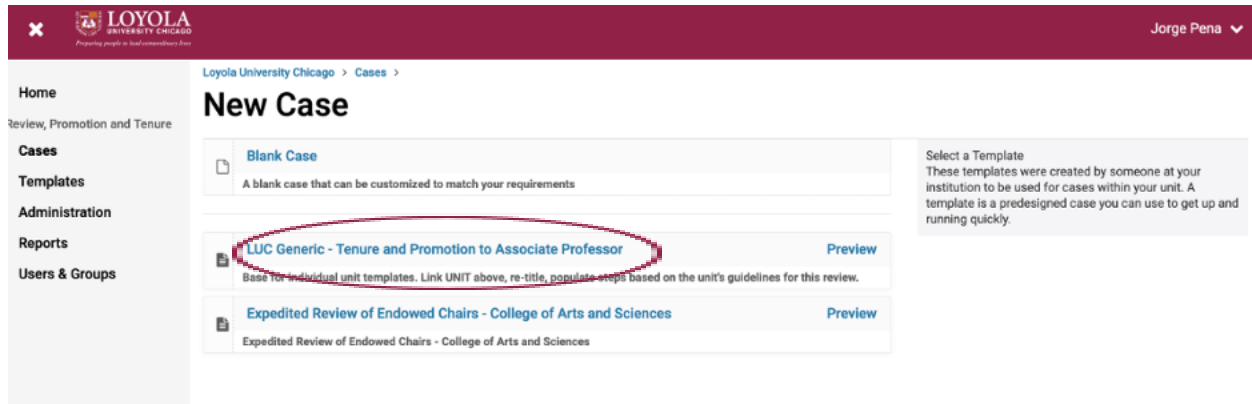
Please select an organizational unit for this case.

Confirm

Cancel

**Step 4.** Click the **template** the candidate needs.

Note: If the template does not appear, contact Faculty Affairs at [interfolio@luc.edu](mailto:interfolio@luc.edu).

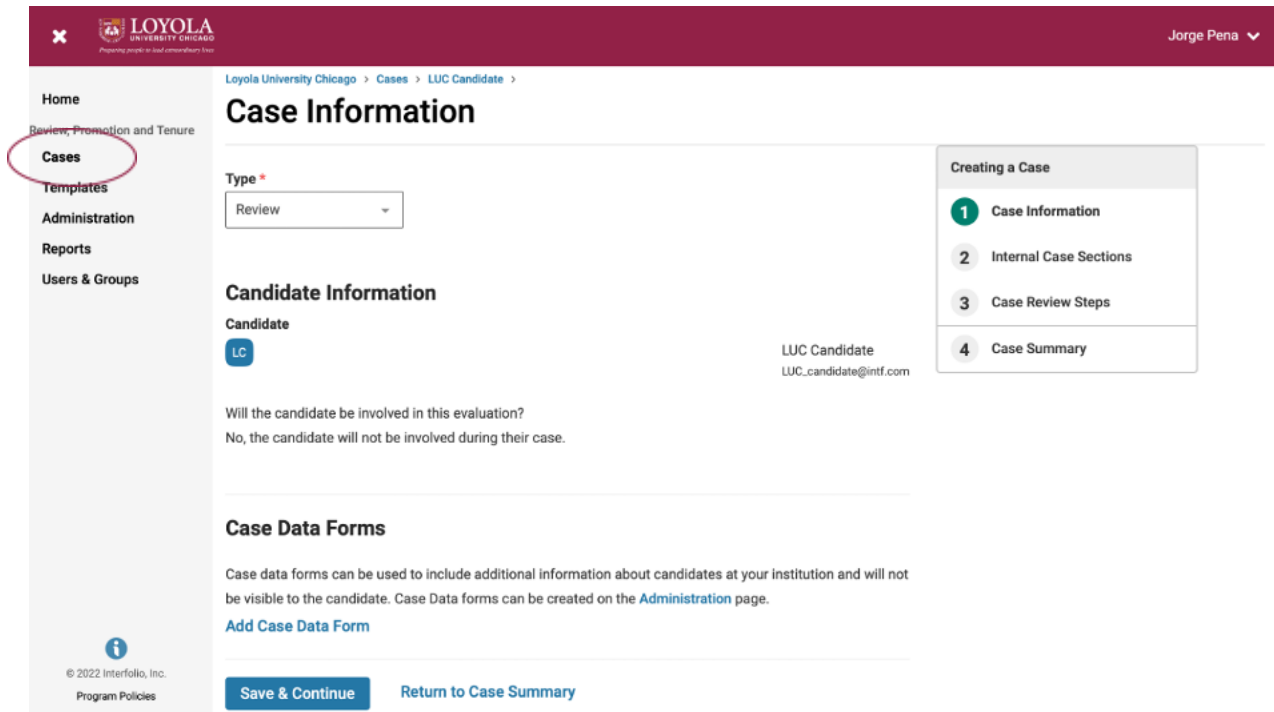


**New Case**

- Blank Case**  
A blank case that can be customized to match your requirements
- LUC Generic - Tenure and Promotion to Associate Professor** [Preview](#)  
Base for individual unit templates. Link UNIT above, re-title, populate steps based on the unit's guidelines for this review.
- Expedited Review of Endowed Chairs - College of Arts and Sciences** [Preview](#)  
Expedited Review of Endowed Chairs - College of Arts and Sciences

**Select a Template**  
These templates were created by someone at your institution to be used for cases within your unit. A template is a predesigned case you can use to get up and running quickly.

**Step 5.** Click on **Cases**.



**Case Information**

**Type \***  
Review

**Candidate Information**  
Candidate: **LC** LUC Candidate  
LUC\_candidate@ntf.com

Will the candidate be involved in this evaluation?  
No, the candidate will not be involved during their case.

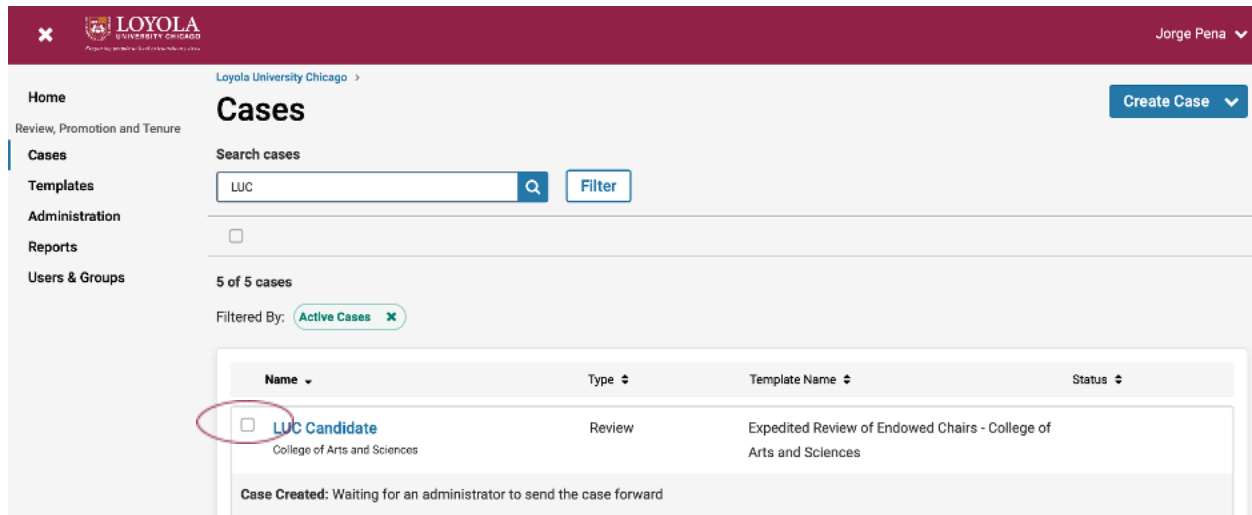
**Case Data Forms**  
Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the [Administration](#) page.  
[Add Case Data Form](#)

**Creating a Case**

- 1 Case Information
- 2 Internal Case Sections
- 3 Case Review Steps
- 4 Case Summary

[Save & Continue](#) [Return to Case Summary](#)

### Step 6. Click the **checkbox**.

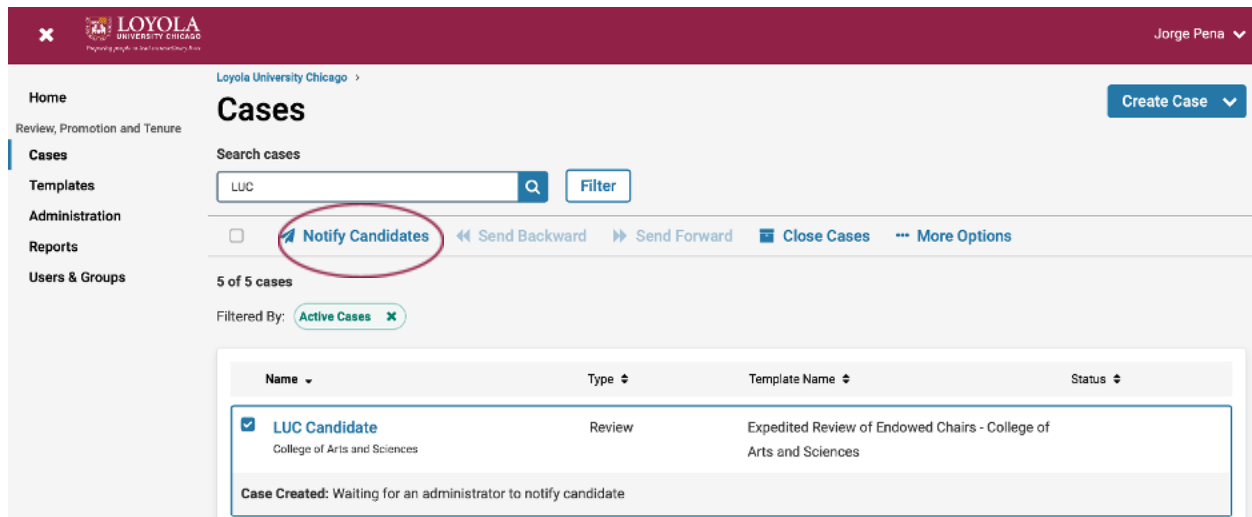


The screenshot shows the 'Cases' management interface. A search bar contains 'LUC' and a 'Filter' button. Below the search bar, there is a table with the following data:

Name	Type	Template Name	Status
<input type="checkbox"/> LUC Candidate College of Arts and Sciences	Review	Expedited Review of Endowed Chairs - College of Arts and Sciences	

Below the table, it says 'Case Created: Waiting for an administrator to send the case forward'. The checkbox for 'LUC Candidate' is circled in red.

### Step 7. Click **Notify Candidates**.

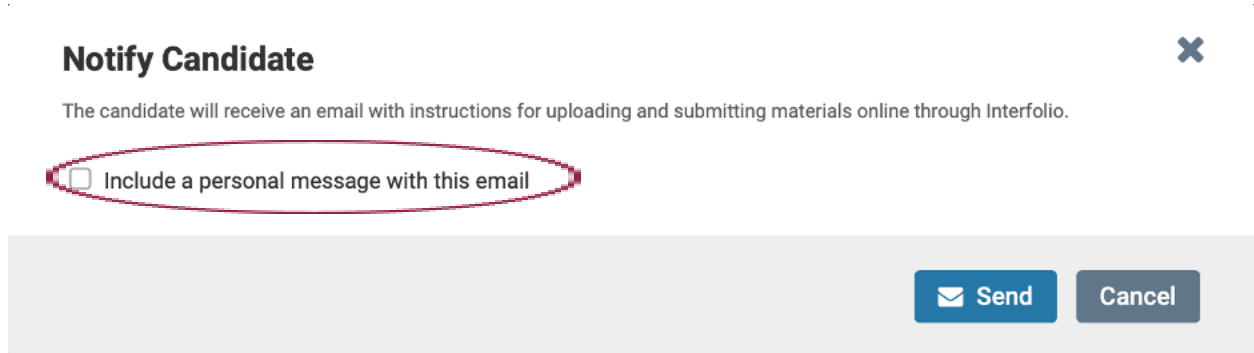


The screenshot shows the 'Cases' management interface after the checkbox has been checked. The 'Notify Candidates' button is circled in red. The table now shows the checkbox checked:

Name	Type	Template Name	Status
<input checked="" type="checkbox"/> LUC Candidate College of Arts and Sciences	Review	Expedited Review of Endowed Chairs - College of Arts and Sciences	

Below the table, it says 'Case Created: Waiting for an administrator to notify candidate'. The 'Notify Candidates' button is circled in red.

**Step 8.** Click the checkbox “Include a personal message with this email.”



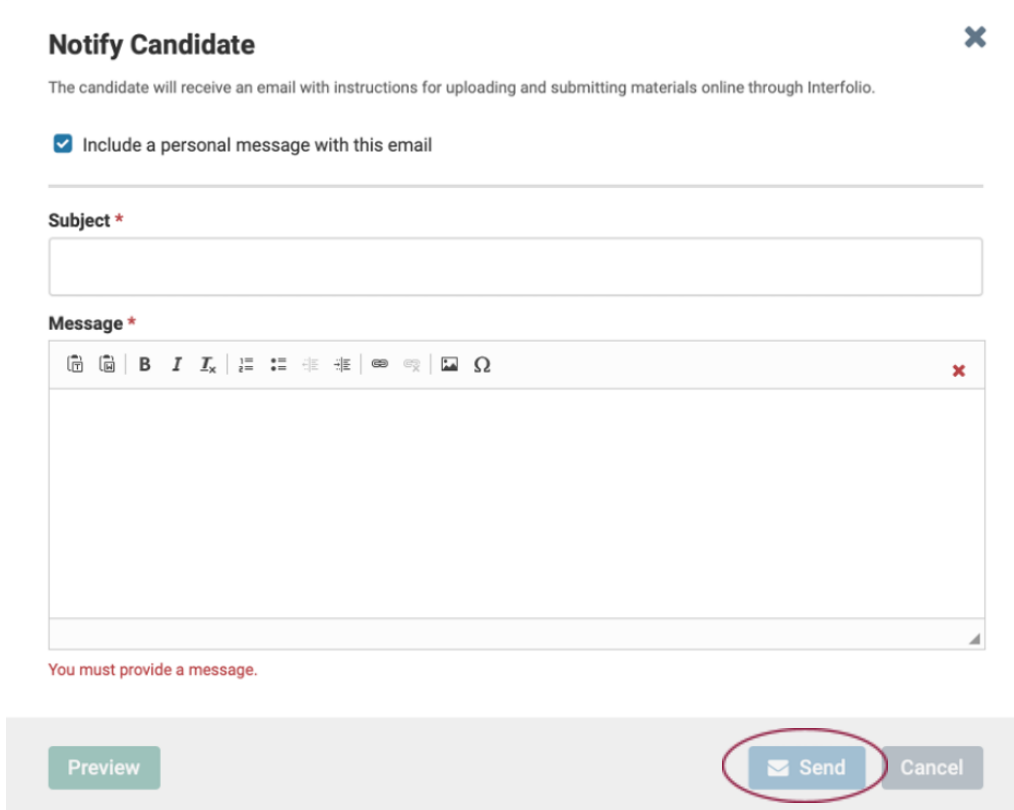
**Notify Candidate** ✕

The candidate will receive an email with instructions for uploading and submitting materials online through Interfolio.

Include a personal message with this email

✉ Send Cancel

**Step 9. Compose** and **send** a message to the candidate. For example, **subject:** case materials for review and promotion; **message:** Dear First Name, please upload case materials for review and promotion per our department’s/academic unit’s guidelines for review and promotion. You can preview the message before sending it.



**Notify Candidate** ✕

The candidate will receive an email with instructions for uploading and submitting materials online through Interfolio.

Include a personal message with this email

**Subject \***

**Message \***

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You must provide a message.

Preview ✉ Send Cancel

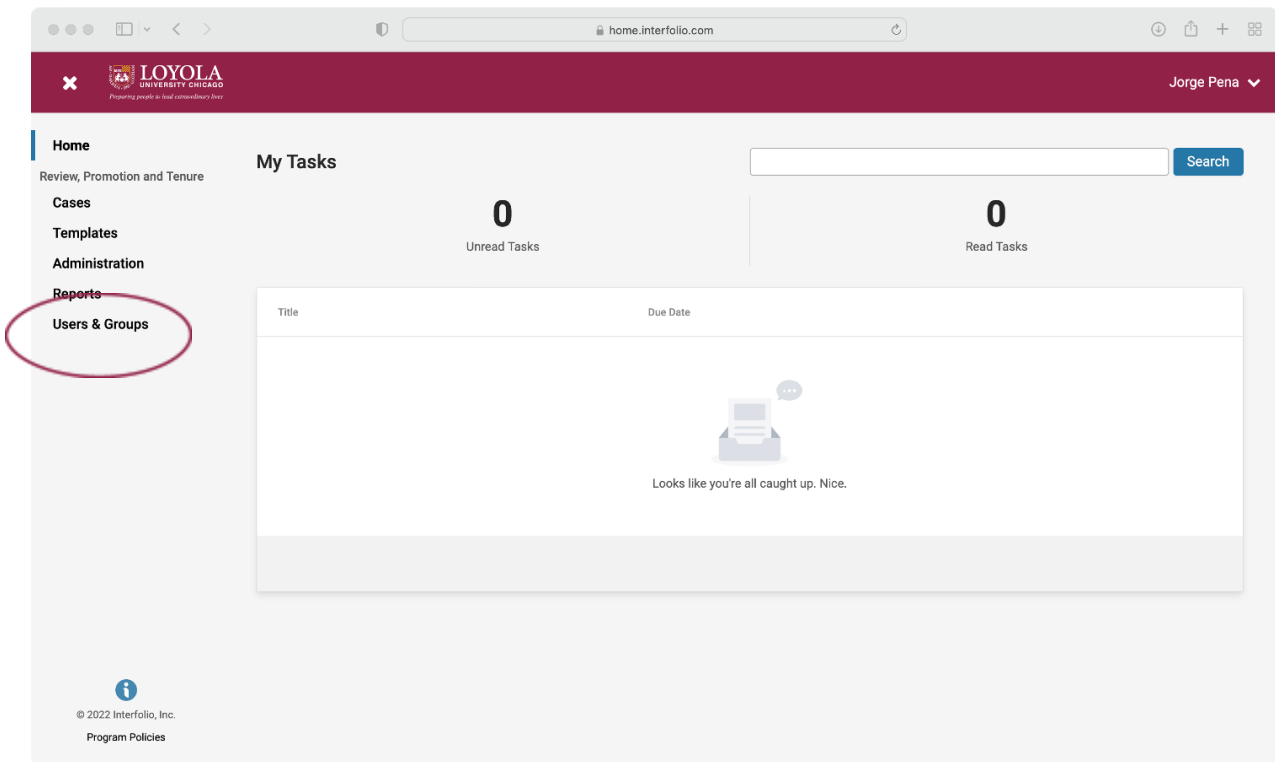
**Policy:** Do not delete case review steps from a case or template. Contact Faculty

Affairs ([Interfolio@luc.edu](mailto:Interfolio@luc.edu)) to edit case review steps.

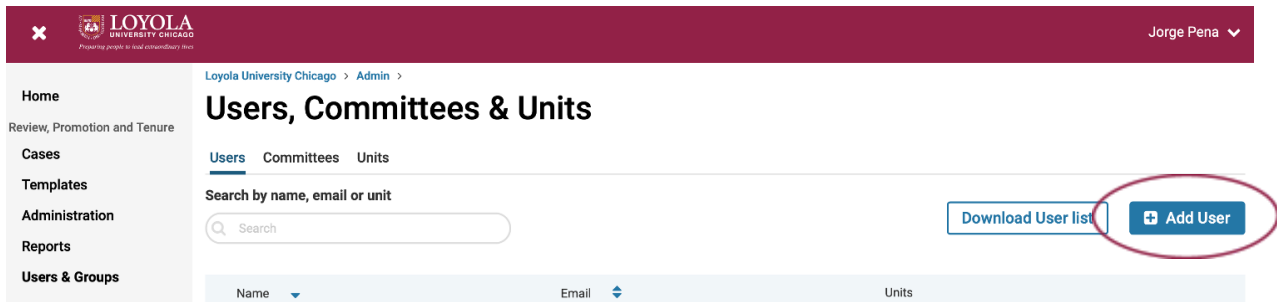
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## Add a new user

### Step 1. Click **Users & Groups**



### Step 2. Click the **Add User** button





### Step 3. Fill out the **form**

- a. First name
- b. Last name
- c. LUC email
- d. Keep the checkmark in the checkbox because users must sign on using LUC credentials.
- e. Unit. Select the academic unit.
  - i. Note: Select the department's name for College of Arts & Sciences users. All other users choose the name of the academic unit.
- f. Click the Save button

#### Add User ✕

<b>First Name *</b>	<b>Last Name *</b>
<input type="text"/>	<input type="text"/>

**Email \***

If checked, this user will need to sign on using their institutional credentials.

**Unit**

Send the user a welcome message.

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# Upload promotion and tenure guidelines to Academic Unit Home Launch

**Step 1.** Click on the name of the candidate

Name ▾	Type ⇅	Template Name ⇅	Status ⇅
<input type="checkbox"/> <b>LUC Candidate</b> Applied Health Sciences	Promotion	Parkinson Academic Rank and Tenure	● Test Case

Step 1 of 8: Academic Home Unit Launch

**Step 2.** Click on “Case Details”

Loyola University Chicago > Cases >

## LUC Candidate

[Send Case ▾](#) [Case Options ▾](#)

**Unit**  
School of Education

**Template**  
Promotion to Clinical Associate Professor

**Status**  
[Select Status](#)

[Case Materials](#) [Case Details 1](#)

Search case materials by title

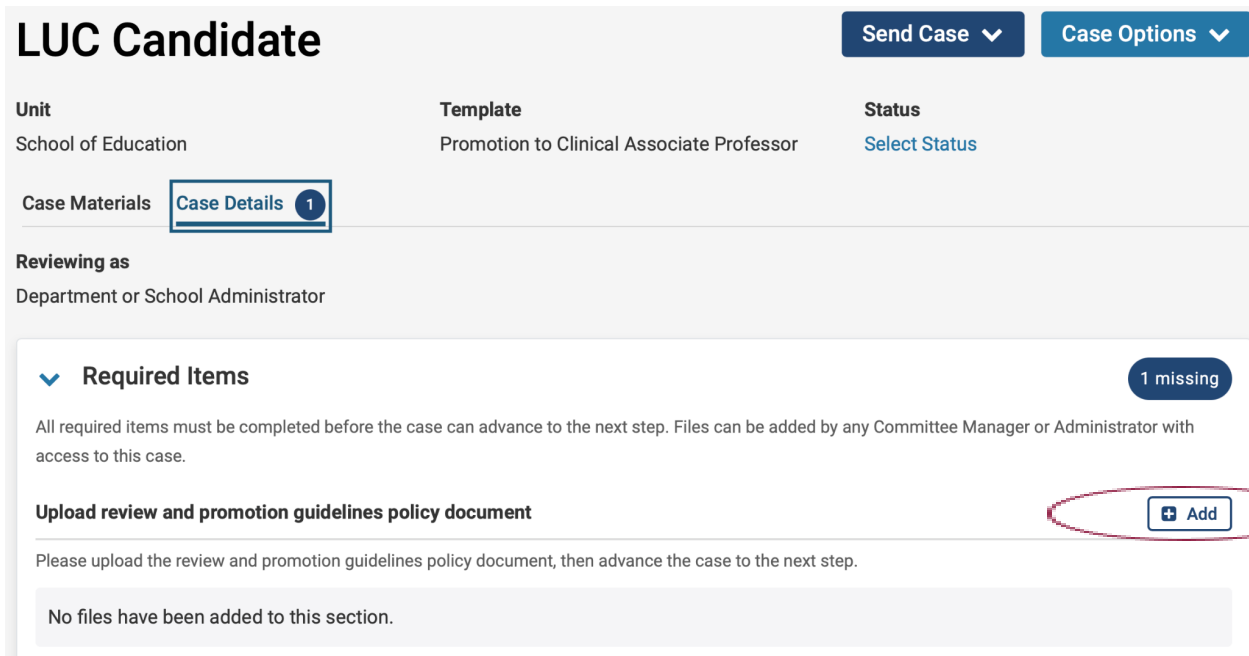
 [Q](#) [Read Case](#)

[Expand All](#) [Collapse All](#) [Download](#) [Share](#) [Settings](#) [Move](#)

### Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

### Step 3. Click **Add**



**LUC Candidate** Send Case ▾ Case Options ▾

**Unit**  
School of Education

**Template**  
Promotion to Clinical Associate Professor

**Status**  
[Select Status](#)

Case Materials Case Details 1

**Reviewing as**  
Department or School Administrator

**Required Items** 1 missing

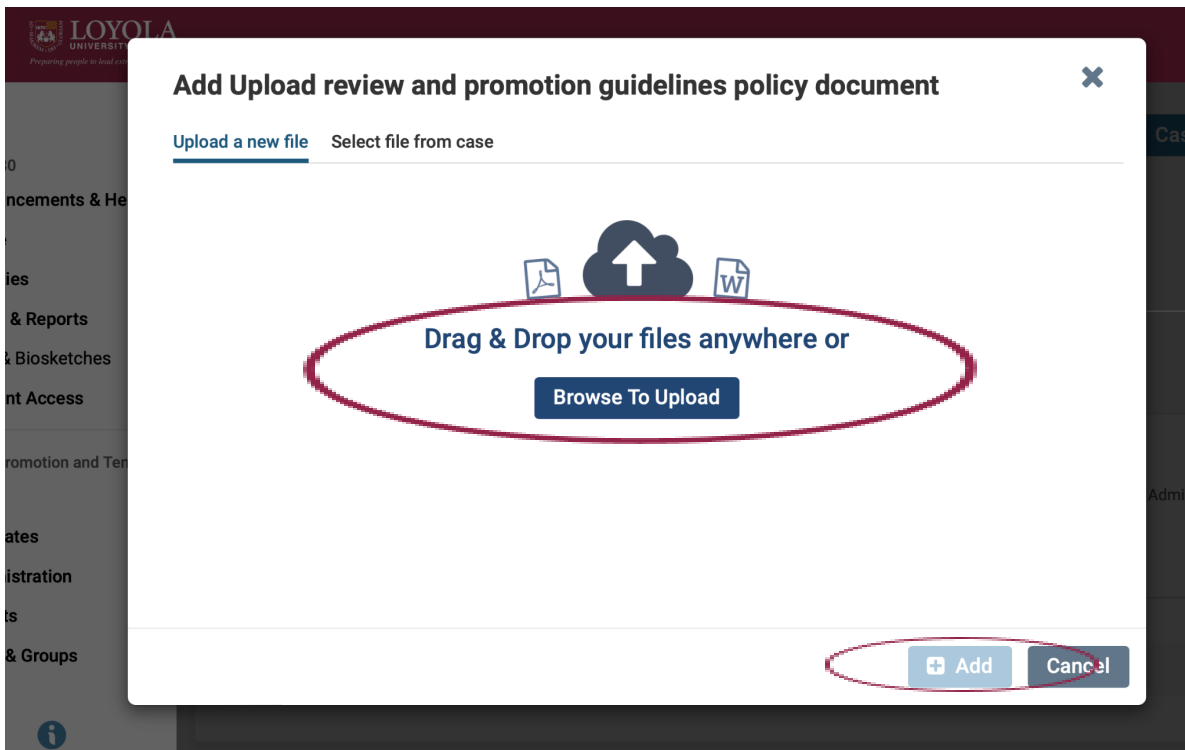
All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

**Upload review and promotion guidelines policy document** Add

Please upload the review and promotion guidelines policy document, then advance the case to the next step.

No files have been added to this section.

### Step 3. Click **“Browse To Upload”** or **Drag & Drop** the file. Then click **Add**.



**Add Upload review and promotion guidelines policy document** ✕

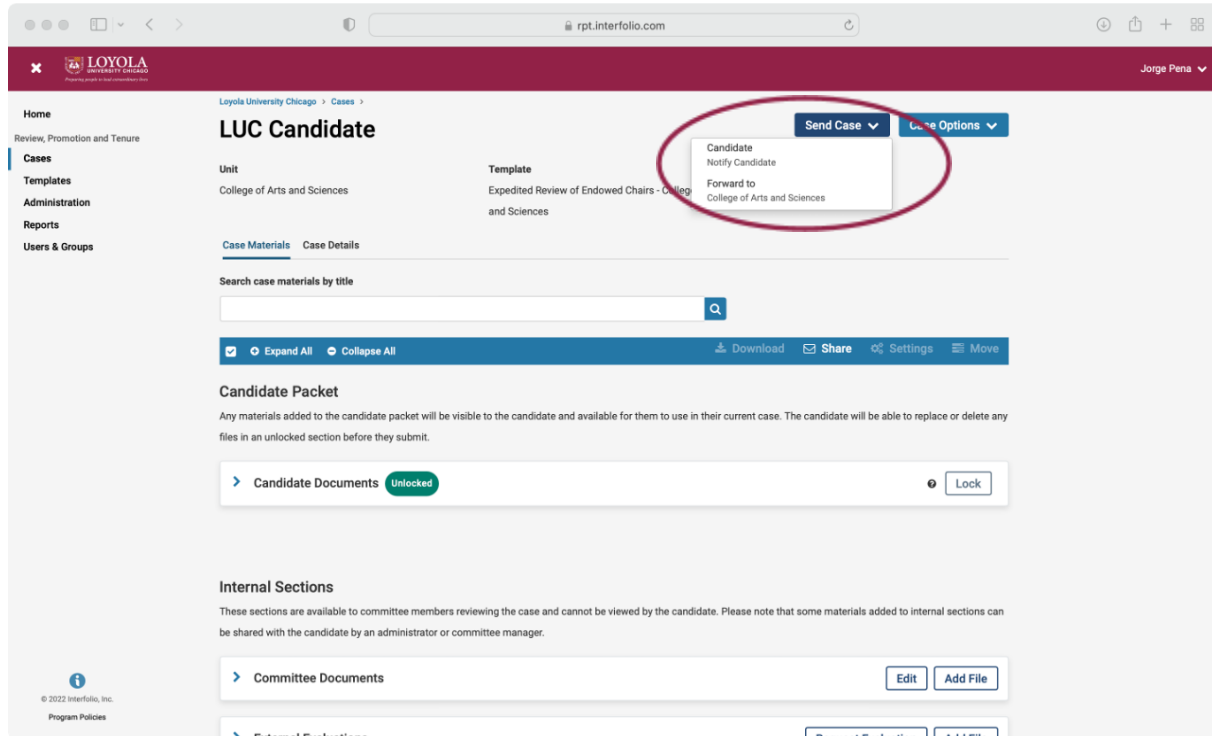
[Upload a new file](#) Select file from case

Drag & Drop your files anywhere or

Browse To Upload

Add Cancel

Step 4. Click on **Send Case**, then click **Forward to**



The screenshot shows the 'LUC Candidate' case management interface. At the top right, there are two dropdown menus: 'Send Case' and 'Case Options'. The 'Send Case' dropdown is open, displaying three options: 'Candidate', 'Notify Candidate', and 'Forward to College of Arts and Sciences'. The 'Forward to' option is highlighted with a red circle. Below the dropdowns, the page displays case details for 'LUC Candidate', including the unit 'College of Arts and Sciences' and the template 'Expedited Review of Endowed Chairs - College of Arts and Sciences'. There is a search bar for case materials and a 'Candidate Packet' section with a 'Candidate Documents' button that is 'Unlocked'. Below that, there are 'Internal Sections' including 'Committee Documents' and 'External Evaluations', each with 'Edit' and 'Add File' buttons.

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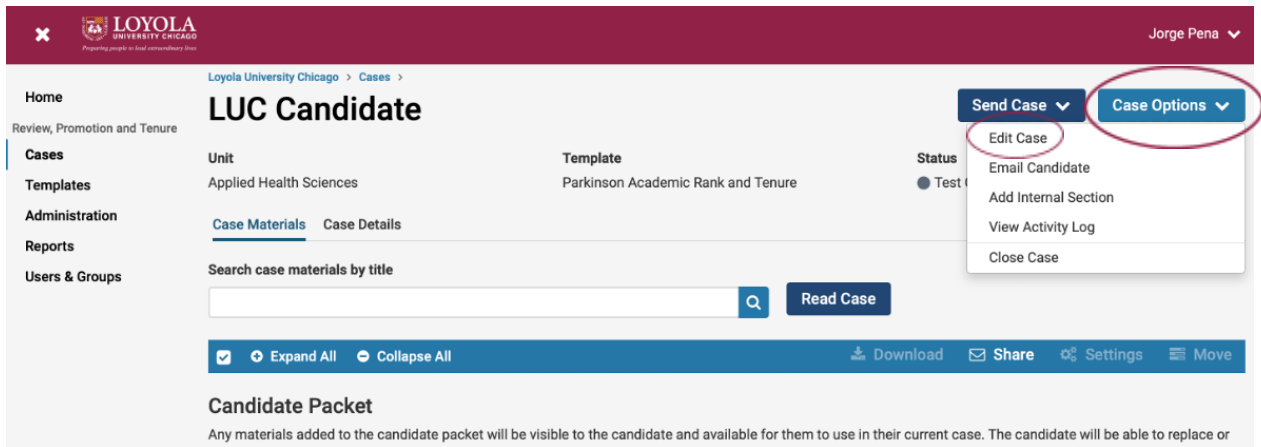
# Add members to case review steps

## Step 1. Click on the name of the candidate

Name	Type	Template Name	Status
<input type="checkbox"/> <b>LUC Candidate</b> Applied Health Sciences	Promotion	Parkinson Academic Rank and Tenure	● Test Case

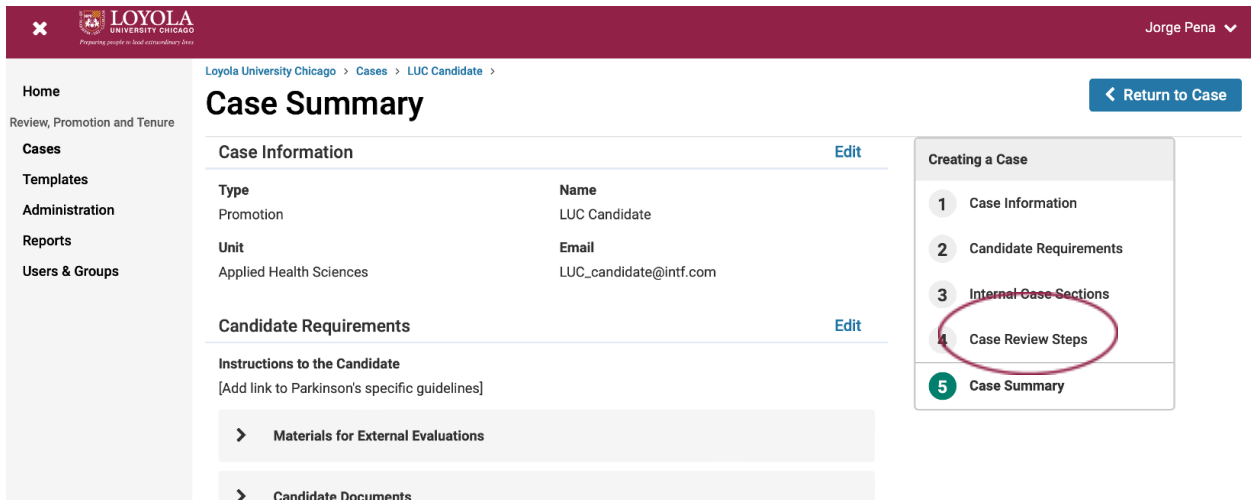
Step 1 of 8: Academic Home Unit Launch

## Step 2. Click on Case Option, then click on Edit Case



The screenshot shows the 'LUC Candidate' page in the system. The 'Case Options' dropdown menu is open, and 'Edit Case' is highlighted. Other options include 'Send Case', 'Email Candidate', 'Add Internal Section', 'View Activity Log', and 'Close Case'. The page also shows a search bar for case materials and a 'Read Case' button.

## Step 3. Click on Case Review Steps



The screenshot shows the 'Case Summary' page. The 'Case Information' section includes details for the candidate: Name (LUC Candidate), Unit (Applied Health Sciences), and Email (LUC\_candidate@intf.com). The 'Candidate Requirements' section includes instructions to the candidate and links to 'Materials for External Evaluations' and 'Candidate Documents'. On the right, the 'Creating a Case' sidebar shows a list of steps: 1. Case Information, 2. Candidate Requirements, 3. Internal Case Sections, 4. Case Review Steps (highlighted), and 5. Case Summary.

### Step 4. Scroll to the committee and click **Edit**

The screenshot shows a 'Creating a Case' sidebar on the right with five steps: 1 Case Information, 2 Candidate Requirements, 3 Internal Case Sections, 4 Case Review Steps (highlighted), and 5 Case Summary. The main content area shows three steps:

- Step 1: Academic Home Unit Launch (Current Step)**
  - Academic Home Unit Launch (0)
    - No Instructions
    - No Required Documents
    - No Required Forms
- Step 2: Department Chair**
  - Dean's Executive Assistant (0)
    - No Instructions
    - No Required Documents
    - No Required Forms
  - Department Chair (2)
    - Includes Instructions
    - No Required Documents
    - No Required Forms
- Step 3: Department Review**
  - Department Committee (0)
    - No Instructions
    - 1 Required Document
    - No Required Forms

The 'Edit' button for the Department Review step is circled in red.

### Step 5. Click on **Add Members**

The screenshot shows the 'Edit Details' page for 'Department Review' (Step 3 of 8). The page includes a sidebar with navigation options: Home, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area shows:

- Step Details (Step 3 of 8)**
  - Step Name: Department Review
  - Due Date: -
  - [Edit Step Details](#)
- Administrators**
  - 31 people can administer the case at this step.
  - 0 administrators are recused at this step.
  - [Manage](#)
- Reviewers**
  - [Add Committee](#)
  - Department Committee** (Ad Hoc Committee (0))
    - [Options](#)
    - [Manage Members](#) | [Instructions](#) | [Required Documents](#) | [Required Forms](#) | [Settings](#)
    - No Members
    - [Add Members](#) (circled in red)

The 'Add Members' button is circled in red.

### Step 6. Search for committee member by name in the search bar

#### Add Members ✕

Sort By Name ▾ New

First Name	Last Name	Email
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### Step 7. Click on + Add, then Close

#### Add Members ✕

Sort By Name ▾ New

First Name	Last Name	Email	
Badia	Ahad	Bahad@luc.edu	<span>+ Add</span>

Close

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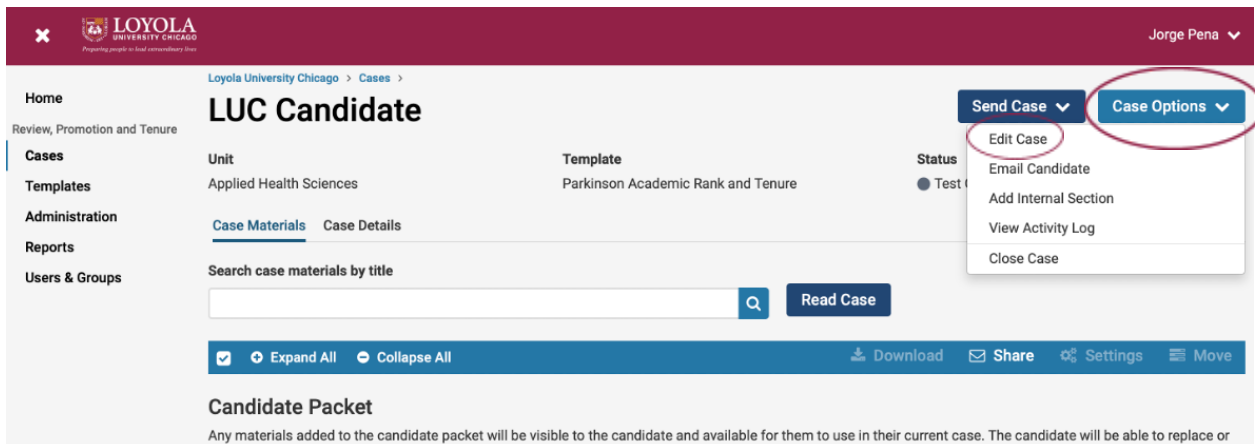
# Identify the committee chair with a star

## Step 1. Click on the name of the candidate

Name	Type	Template Name	Status
<input type="checkbox"/> <b>LUC Candidate</b> Applied Health Sciences	Promotion	Parkinson Academic Rank and Tenure	● Test Case

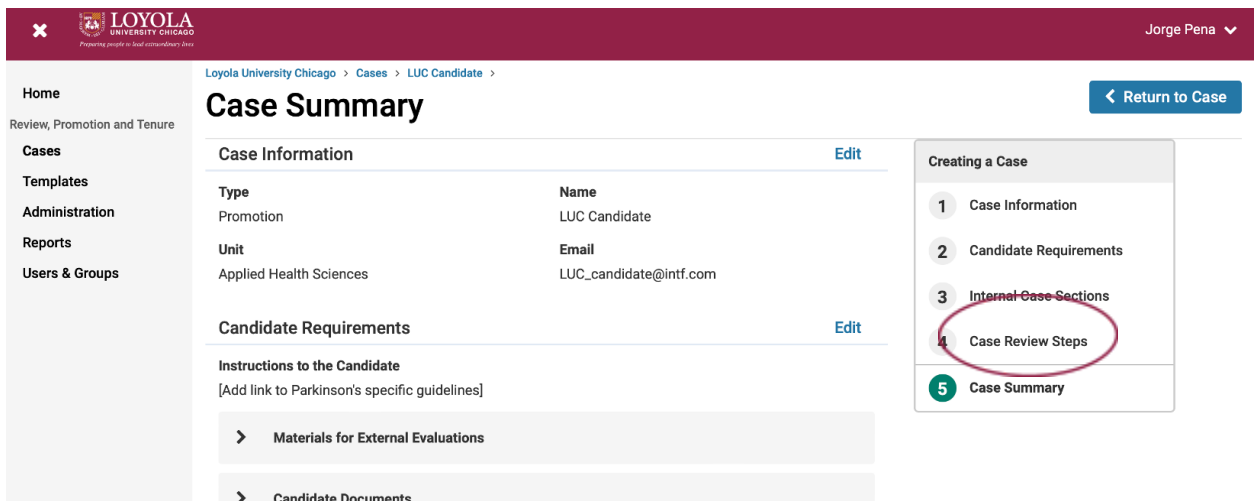
Step 1 of 8: Academic Home Unit Launch

## Step 2. Click on Case Option, then click on Edit Case



The screenshot shows the 'LUC Candidate' case page. The 'Case Options' dropdown menu is open, and the 'Edit Case' option is circled in red. The page header includes the Loyola University Chicago logo and the name 'Jorge Pena'. The left sidebar contains navigation options: Home, Cases, Templates, Administration, Reports, and Users & Groups. The main content area shows the case details, including the unit 'Applied Health Sciences' and the template 'Parkinson Academic Rank and Tenure'. A search bar for case materials is visible, along with a 'Read Case' button. At the bottom, there are options to expand or collapse all items, and buttons for Download, Share, Settings, and Move.

## Step 3. Click Case Review Steps



The screenshot shows the 'Case Summary' page. The 'Case Review Steps' step in the 'Creating a Case' sidebar is circled in red. The page header includes the Loyola University Chicago logo and the name 'Jorge Pena'. The left sidebar contains navigation options: Home, Cases, Templates, Administration, Reports, and Users & Groups. The main content area shows the case details, including the unit 'Applied Health Sciences' and the template 'Parkinson Academic Rank and Tenure'. A search bar for case materials is visible, along with a 'Read Case' button. At the bottom, there are options to expand or collapse all items, and buttons for Download, Share, Settings, and Move.



### Step 4. Scroll to the committee and click **Edit**

The screenshot shows a 'Creating a Case' sidebar on the right with five steps: 1 Case Information, 2 Candidate Requirements, 3 Internal Case Sections, 4 Case Review Steps (highlighted), and 5 Case Summary. The main content area shows three steps:

- Step 1: Academic Home Unit Launch (Current Step)**
  - Academic Home Unit Launch (0)
    - No Instructions
    - No Required Documents
    - No Required Forms
- Step 2: Department Chair**
  - Dean's Executive Assistant (0)
    - No Instructions
    - No Required Documents
    - No Required Forms
  - Department Chair (2)
    - Includes Instructions
    - No Required Documents
    - No Required Forms
- Step 3: Department Review**
  - Department Committee (0)
    - No Instructions
    - 1 Required Document
    - No Required Forms

The 'Edit' button for the Department Review step is circled in red.

### Step 5. Click the **star**

The screenshot shows the 'Step Details (Step 3 of 8)' page for 'Department Review'. The 'Required Forms' tab is selected. The 'Reviewers' section shows the 'Department Committee' with one member, 'Badia Ahad' (Bahad@luc.edu). A star icon next to the member name is circled in red.

Summary statistics:

- 31 people can administer the case at this step.
- 0 administrators are recused at this step.

Buttons: Edit Step Details, Add Committee, Add Members.

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