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.

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## Interfolio RPT Policies

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

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<td>1. Create cases for review, promotion, or tenure</td>
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<td>2. Upload promotion and tenure guidelines to the Academic Unit Home Launch step*</td>
<td>2. Add case review steps</td>
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<td>3. Add members to the Academic Unit Home Launch, Department review committee, school review committee, and Dean review steps</td>
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<td>4. Identify the chair of a committee using the star function</td>
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<td>7. Provide technical support to academic units</td>
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*Do not delete case review steps from cases or templates. Contact Faculty Affairs (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.
**Step 4.** Click the **template** the candidate needs.

Note: If the template does not appear, contact Faculty Affairs at interfolio@luc.edu.

**Step 5.** Click on **Cases**.
Step 6. Click the checkbox.

Step 7. Click Notify Candidates.
**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

**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.

**Policy:** Do not delete case review steps from a case or template. Contact Faculty.
Affairs (Interfolio@luc.edu) to edit case review steps.

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
Upload promotion and tenure guidelines to Academic Unit Home Launch

Step 1. Click on the name of the candidate

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Template Name</th>
<th>Status</th>
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<tbody>
<tr>
<td>LUC Candidate</td>
<td>Promotion</td>
<td>Parkinson Academic Rank and Tenure</td>
<td>Test Case</td>
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</table>

Step 2. Click on “Case Details”

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

Unit
School of Education

Template
Promotion to Clinical Associate Professor

Status
Select Status

Case Materials
Case Details

Reviewing as
Department or School Administrator

Required Items
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
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.
Step 4. Click on **Send Case**, then click **Forward to**
Add members to case review steps

Step 1. Click on the name of the candidate

- Click on the name of the candidate

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

- Click on Case Option, then click on Edit Case

Step 3. Click on Case Review Steps

- Click on Case Review Steps
**Step 4.** Scroll to the committee and click **Edit**

**Step 5.** Click on **Add Members**
Step 6. Search for committee member by name in the search bar

Add Members

Search for committee member by name in the search bar

Step 7. Click on + Add, then Close

Add Members

Click on + Add, then Close

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Identify the committee chair with a star

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

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

**Step 3.** Click **Case Review Steps**
Step 4. Scroll to the committee and click **Edit**

Step 5. Click the **star**