

Office of the Provost

Reappointment, Promotion and Tenure

eDossier/Interfolio Step-by-Step Instructions – for the Internal Reviewer

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Important/Useful Tips to Remember

- All review letters will be shared in the system (no more need for paper copies) (see "Accessing Subsequent Reviewer Letters, page 50). Committee managers (PRC Chairs, Department Chairs, and Deans) will not lose access to view an eDossier until the review is complete and will have access to view the subsequent reviewer letters in the system.
- It is the responsibility of the committee manager (Chair of the PRC, Department Chair, and Dean) to forward the case to the subsequent reviewer on/before the contractual deadline (see The University Calendar of Key Faculty Contract Events for more details).
- The eDossier system is set up using "soft deadlines" meaning that both the faculty candidate and the reviewers will not be locked out of the system on the posted due date but it will be the responsibility of the reviewer/committee manager (Chair of the PRC, Department Chair, and Dean) to forward the case on/before the contractual deadline.
- It is the responsibility of the committee manager (Chair of the PRC, Department Chair, and Dean) to forward the copy of the review letter to the faculty candidate whom they are reviewing on/before the contractual deadline (see "Share the Review Letter with the Candidate", page 44).
- Ignore "Voting Results" located on the bottom of the screen where you would upload your review letter. It is a system feature that will not be used.
- Case=eDossier
- Committee manager = Chair of the PRC, Department Chair, and Dean

Receiving Notification Email/Beginning Your Review

As a committee member or committee manager you will receive an email notification once the faculty candidate has submitted their eDossier and it is time for you to begin your review.



John Smith's case is available for review.

SIGN IN

The candidate has submitted their case and it is now available for your committee to review.

Clicking on "Sign In" will take you to your login page.

This login page may appear and look different from what you are used to. Select "Partner Institution".

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Type in "Cleveland State University" in the "Search for your institution" field.

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Search for your institution	a	Sign Up	
Sign In			
Sign in with an Interfolio account >			

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Select "Sign In" which will take you to your normal login page.

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Viewing Faculty Candidate Case/eDossier Materials

This article explains how Committee Members or others who are evaluating a case can access materials and what they can expect to find on the case page of a candidate.

Once logged into your Faculty180 Account, select ''Cases'' under Review, Promotion & Tenure on the left hand navigation bar.

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Home Review, Promotion and Tenure	Welcome back, El
Cases	Your Action Iter

You will see a list of cases that are available to you.

Click the name of the candidate to view case materials.

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 Edward Angerer Historical Musicology 	Appointment	Anthropology Pramo
Step 1 of 3: Music History Promotion C	ommittee	

Accessing materials:

On the "Case Materials' tab of the case page, you can read documents that were submitted by the candidate or committee members.

Click "Read Case" to load all accessible case materials into our document viewer where they can be viewed online.

You can also click on the title of a document to open that specific document in the document viewer.

Search case materials by title	Q Read Case
O Explaint All O Collapse All	
Candidate Packet	
Any materials added to the candidate packet will be visible to the candid	date and available for them to use in their current case. The ca

The document viewer displays all materials organized by sections.

Note: You can search through the PDF files of materials, and leave annotations on the materials.

<u>Making Notes on Case Packet/eDossier Materials and Export Your</u> <u>Annotations</u>

Reviewers can add annotations to materials in a candidate's file and export those annotations in a PDF file for offline access. This makes it easy to highlight the most important parts of a packet and track and revisit thoughts when evaluating materials.

Annotations are private notes and are only visible to the reviewer who adds them. However, much like paper notes, annotations may be "discoverable" as evidence in certain legal proceedings.

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6 of 6 cases			
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Step 1 of 3: CCS Department Review			
C Edward Angerer	Tenure	Music Promotion Cases	Tenure Gravied

Open the case you want to review.

On the ''Case Materials'' tab of the case page, click ''Read Case'' to load all accessible case materials into our document viewer where they can be viewed online

You can also click on the title of a document to open that specific document in the document viewer.

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The document viewer displays all materials organized by sections. Note that you can download materials (if enabled), search through the PDF files of materials, and leave annotations on the materials.

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You can click the export icon to generate a PDF of your annotations that can be downloaded and printed.

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CV Has Ed read this?	
CV Strong teaching record.	Nov 7, 2016 at 3:36 PM

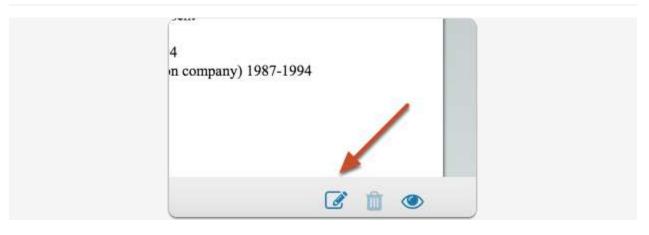
Annotations are added from the lower right corner of the viewer.

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Click the "View" icon to toggle on or off the display of annotations.



Click the "Note" icon to add an annotation on the currently displayed document.



After clicking the "Note" icon, select the type of annotation you want to create

- Make no selection to add a simple "stickie" note to the document
- "Point" adds a note with an arrow pointing to a particular point in the document
- "Area" adds a note about a selected area
- "Text" adds a note about highlighted

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Sticky notes:

Click into the document and add your note where you want it to appear.

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1987-1994 production cor	
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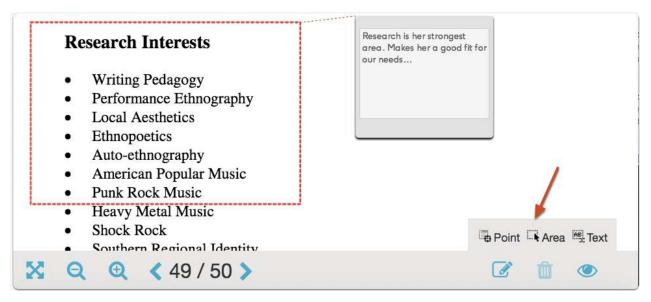
"Point" (arrow) notes:

Select "Point," and add a note with an arrow in the document. You can drag and drop to change the location of the arrow or note.

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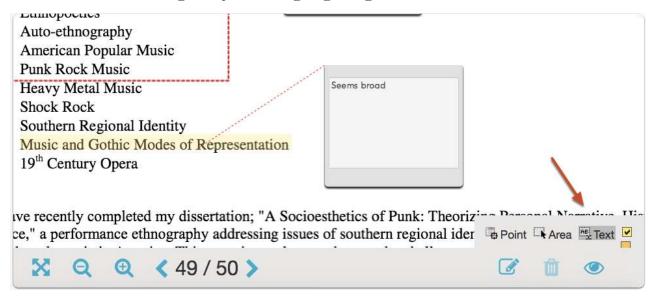
"Area" notes:

Click "Area," and draw to select an area in the document to annotate.



"Text" notes:

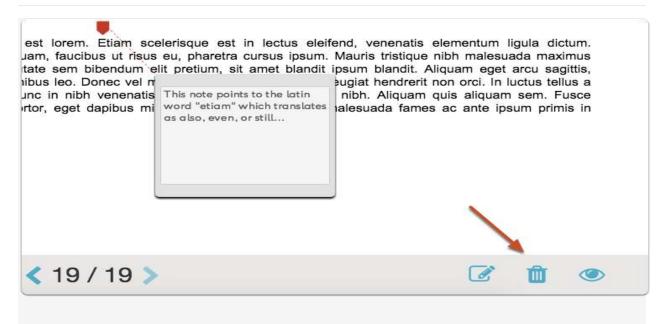
Click "Text" and select text in the document to highlight. Note that you can choose between orange or yellow highlighting.



To edit a note you've added, simply click into the text field.

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To delete a note, click into the text field and then click the trash icon.



Uploading Internal Review Letters

As a committee manager (PRC Chairperson or Department Chairperson/School Director, or Dean), you will be responsible for uploading the signed review letter for the faculty candidate you are reviewing. There is also a space to upload any additional reviewer inserted materials.

Click the candidate's name to open the case with required documents.

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18 of 18 cases	Туре Ф	Template Name \$	

Open the ''Case Details'' tab and click ''Add'' under ''Required Documents''.

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Click "Browse to Upload" a new file.

Add Review Summary	×
Upload a new file Select file from case	
Drag & Drop your files anywhere or	
	Σ
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Select the section of the packet in which to add the document (in this case "Internal Review Letters"). Select "Add".

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pload a new file Select file from case	
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Once uploaded, the document requirement will be labeled "Complete".

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Once you have completed uploading your review letter and additional reviewer material (if applicable), you are now ready to share the results of the review with the faculty candidate and forward the case to the next review step and (see "Share the Review Letter with the Candidate" on page 44 and "Sending a Case/eDossier Forward "on page 47 and).

Adding Supplementary Materials

As a committee manager (Chair of the PRC, Chair of Department/School, or Dean) you may wish to add more than the one required reviewer letter to the faculty candidate's eDossier to be accessible/viewed by other reviewers (e.g. supplementary materials such as materials requested by the DPRC/CPRC including missing co-author letters and/or R/S/CA accepted after submission of the eDossier). Below you will find step-by-step instructions on how to do this.

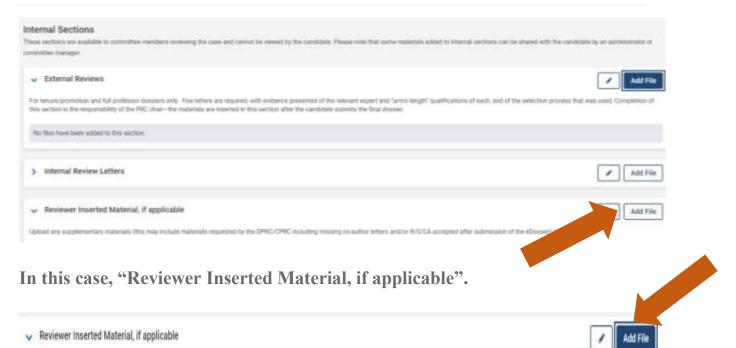
Click the candidate's name to open the case you wish to add/upload supplementary materials.

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Open the "Case Materials" tab.

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Select "Add File" to add a file to the section you wish to add supplementary materials to (other than the one required reviewer letter) .

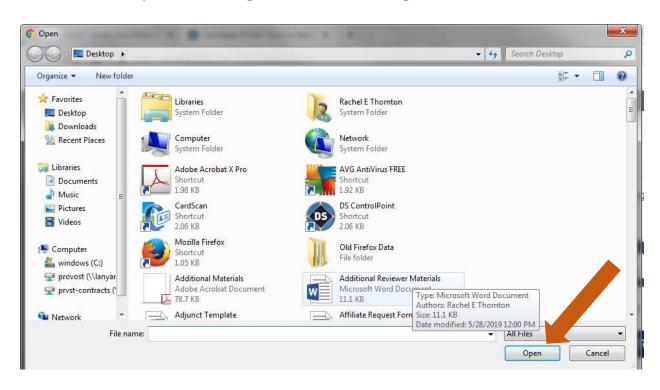


Upload any supplementary materials (this may include materials requested by the DPRC/CPRC including missing co-author letters and/or R/S/CA accepted after submission of the eDossier) in this section.

No files have been added to this section.

Click "Browse to Upload" a new file.

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Choose the file you wish to upload and select "Open".

Select "Save".

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You can continue adding as many files as you wish by repeating the steps (1-5).

Once you have completed uploading your review letter and additional reviewer material (if applicable), you are now ready to share the results of the review with the faculty candidate and forward the case to the next review step and (see "Share the Review Letter with the Candidate" on page 44 and "Sending a Case/eDossier Forward "on page 47 and).

External Reviewer Evaluations

As a committee manager (PRC Chair or Department Chair) you will receive an email notification once the faculty candidate has submitted their Preliminary Dossier section in their eDossier. You can now login to begin sending the preliminary dossier to external reviewers.



Rachel Thornton's case is available for review.

SIGN IN

The candidate has submitted their case and it is now available for your committee to review.

Fowered by Interfails | Support

Once logged into your Faculty180 Account, select ''Cases'' under Review, Promotion & Tenure on the left hand navigation bar.

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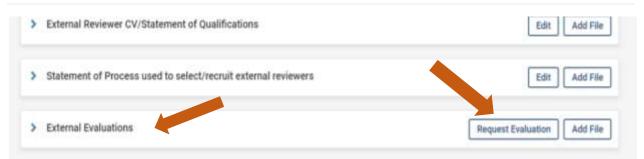
You will see a list of cases that are available to you. Click the name of the candidate to view case materials.

Rachel Thornton	Review	Tenure & Promotion - TT Faculty (With DPRC)
Cleveland State University		

You will automatically be directed to the "Case Materials" tab for the candidate's case you are viewing.

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here sections are available to committee memb		
e shared with the candidate by an administrator		

Scroll down to "External Evaluations" and select "Request Evaluation" to begin sending preliminary dossier materials to external reviewers.



Fill out the Request Evaluation form by entering the Evaluator's first name, last name, and email in the appropriate boxes/fields. <u>(If you choose to add</u> <u>more than one evaluator at a time, see instructions "To send multiple external</u> <u>reviewers the review invite at once on page 38).</u>

Your email address will automatically populate in the "Reply-to" field so external reviewers can reply directly to you. You can select a deadline for external reviewers to submit their evaluation letter in the box/field titled "Deadline" and give access to who internally you wish to see these letters as they are submitted (choose "Administrators and Committee Managers").

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Fill out the "Subject of the email" to the external evaluator. In the "Message" box/field, you will need to type in your message or paste your letter you saved (from the eDossier Information document – Sample Letters to External Reviewers) as you cannot add any attachments other than the faculty materials to review.

Be sure to notify external reviewers in the message field that they will need to send you their CV and information for honorarium payout OUTSIDE of the system in a separate email.

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Once you have filled out all fields/boxes and included your message to the external evaluators, you can now select "Add" to begin adding materials to send for review.

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To select files individually select the blue plus button located to the left of each file (All faculty have been notified that they should label their materials they wish to have sent as "Preliminary Dossier").



Once you have selected all of the files you wish to share with the external reviewers, select "Send".



The screen will go back to the dossier of the faculty you are reviewing and you will see a confirmation message that you sent the external reviewer email successfully in the bottom left corner of the screen.

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Below is a screenshot of what external reviewers will receive in their email.

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If they choose to accept, they will select "I accept" and it will take them to the evaluation. If they decline, you will be notified via email of their decline.

If the external reviewer accepts, they will be redirected to this page and can select "View" or "Download" to the right of each file to view the documents.

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n III warnan, In. Pagan Panan	Evaluation				

Once the external reviewer has viewed the documents/files shared with them, they can submit their evaluation (please note the system only allows one upload or attachment which should be the external evaluator letter, and since we require their CV to be sent to us as well and their information for the honorarium payout, this is why you have requested them to send this information in a separate email to you in the system.

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Once the external reviewer has uploaded their external review letter, it will automatically upload in the eDossier system in the appropriate section labeled "External Evaluations". You will receive an email letting you know it has been uploaded to the system. You can choose "I accept" which will take you to the eDossier/Faculty180 login page or login to the system the way you normally do.



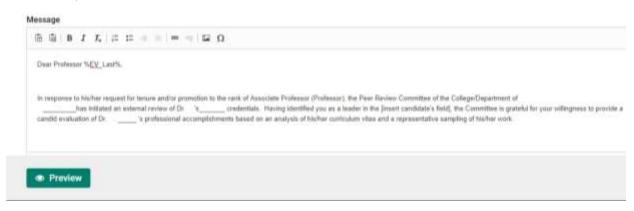
As the PRC chair or department chair, you will still be responsible for uploading the external reviewers CV/Statement of Qualifications and the Statement of Process used to select/recruit external reviewers after the faculty submission deadline in September. See the next section in the instruction guide titled "Uploading External Reviewers CV/Statement of Qualifications and the Statement of Process used to select/recruit external reviewers" on page 40.

Sending multiple external reviewers the review invite at once

If you wish to send the review invite to more than one external reviewer at a time, you will fill out the fields/boxes as suggested in the steps above, but you will select the blue plus sign to the left of "Add Another Evaluator". Repeat this step until you have added all external reviewers.

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In the "Message" section or body of email, you will add the variables below to the greeting (e.g. Dear Professor %EV_Last% -if you want the last name such as Dear Professor Thornton to appear as the greeting for each separate reviewer).



Once you have filled out all boxes/fields and have uploaded all files you wish to share with the external reviewers (see steps 3-6 above), select "Send".



The screen will go back to the dossier of the faculty you are reviewing and you will see a confirmation message that you sent the external reviewer email successfully in the bottom left corner of the screen.

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<u>Uploading External Reviewers CV/Statement of Qualification and</u> <u>the Statement of Process used to select/recruit external reviewers</u>

As the PRC Chairperson you will still be responsible for uploading the external reviewer materials (CV/Statement of Qualifications and Statement of Process used to select/recruit reviewers) before all other reviewers gain access to the eDossier and after the September 1 deadline. The system allows for multiple uploads to accommodate the number of external reviewers and their accompanying materials (CV's/Statement of Qualifications and the Statement of Process used to select/recruit reviewers).

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Q. Search cares	₩ Filter		
18 of 18 cases			
C Name	Turne A	Termitate Name +	
Name - Rita A. Bookman Demo University	Туре Ф	Template Name \$	

Click the candidate's name to open the case with required documents.

Open the "Case Materials" tab.

Home You: Packets Packits 180 Announcements & Help Proble	Cleveland State University > Case Cheryl Bracker Unit Cleveland State Const Case Materials Case Details	Template Tenure & Promotion - TT Faculty (Without DPRC)	Status Select Status
Activities Evaluations Forms & Reports	Search case materials by title	Q Read Car	æ

Choose the appropriate section in which you wish to upload the External Review Materials (in this case "External Reviewer CV/Statement of Qualifications"). Select "Add File".

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Click "Browse to Upload" a new file.

Upload a new file	Select file from case	
	Drag & Drop your files anywhere or	
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Desktop	eFAAR Instructions	6/29/2019 3:56 PM	Microsoft Word D	5,996 KB		
Documents	💼 External Evaluation for Rachel Thornton	3/24/2020 3:13 PM	Microsoft Word D	12 KB		
Downloads	External Recommendations Screenshots	1/29/2020 4:07 PM	Microsoft Word D	664 KB		
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-	📄 External Review Letter 2	7/17/2019 8:46 AM	Microsoft Word D	12 KB		
Pictures	External Reviewer #1 CV	4/13/2020 12:39 PM	Microsoft Word D	12 KB		
Nideos	External Reviewer CV 1	7/17/2019 8:49 AM	Microsoft Word D	12 KB		
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×	💼 external reviewer pictures	3/24/2020 3:33 PM	Microsoft Word D	2,038 KB		
File na	me: External Reviewer #1 CV			×	l Files	
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Choose the file you wish to upload and select "Open".

Select "Save".

Add File	×
Add New File Pravious Reviews	
Upinad Video Webpege	
Name	
External Reviewer #1 CV	
	Save Cancel

Administration 🗸	> Reviewer Inserted Material, if applicable		Edit Add File
Promotion & Tenure			
Cases	External Reviewer CV/Statement of Qualifications		
Templates	 External Reviewer CV/Statement of Qualifications 		Edit Add File
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Users & Groups	🗋 External Reviewer #1 Cé	Added by Rachel Thomson Apr 13, 2020	Lat.

Now the document has been added to the selected section.

You can continue adding as many files as you wish by repeating the steps (1-5).

Once you have completed uploading the CV/Statement of Qualifications for each external reviewer and the Statement of Process used to Select/Recruit External Reviewers, you are now ready to forward the case/eDossier to the next review step (note that the candidate will not see these documents; only internal reviewers) (see "Sending a Case/eDossier Forward" page 47).

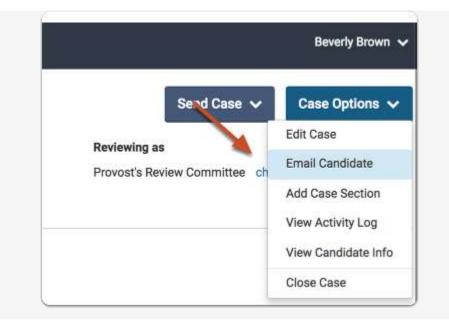
Sharing the Review Letter with Candidate

As the committee manager (PRC Chairperson or Department Chairperson/School Director, or Dean), you are responsible for sharing the results of your (or your committee's) review by sending the review letter to the candidate by the contractual deadline. Once you have shared your signed review letter with the candidate using these instructions, you will be ready to send the case forward to the next review step (see "Sending a Case/eDossier Forward" on page 47).

	1000 MMARCO	
Q Search cases	🗄 Filter	
21 of 21 cases	/	
🗋 Name -	Type ©	Ter

Navigate to the case you want to edit.

Click the ''Case Options'' menu at the top right of the page and select ''Email Candidate''.



Enter subject and message and click "Send".

The current return email address appears to the right of the form.

Click "Preview" to see how the message will look in the candidate's inbox.

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To share files with the candidate:

Share Files ? + Add

Click "Add" at the bottom of the form.

Select files to share.

Candidates will receive an email with instructions to sign in and view shared committee files.

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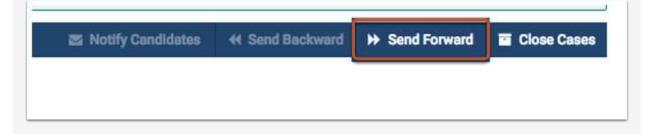
Sending a case/eDossier Forward

As a PRC Chairperson or Department Chairperson/School Director, or Dean, you are responsible for sending the case/eDossier forward to the next reviewer level so they can begin their review by the contractual deadline. Once you have uploaded your signed review letter, you are now ready to send the case/eDossier forward.

Select the cases/eDossiers you want by putting a check mark next to each one.

		S Notify Candidates 4 Send Back	tward 🕨 Send Forward 🖬 Close Case
of 6 cases			
2 Name -	Туре 🕈	Template Name 🔹	Status 🔹
 Erin Combaccia Department of Landscape Architecture 	Review	School or Architecture Annual Review	
Case Created: Waiting for an administrator to send the case for	ward		
John Jacobson Department of Landscape Architecture	Review	School or Architecture Annual Review	
Case Created: Waiting for an administrator to send the case for	vard		
 Edward Jefferson Department of Landscape Architecture 	Review	School or Architecture Annual Review	
Case Created: Walting for an administrator to send the case for	vard		
 Frank Lee Department of Landscape Architecture 	Review	School or Architecture Annual Review	
Case Created: Waiting for an administrator to send the case for	ward		

Click Send Forward in the blue ribbon on top of the Case List.



Confirm your choices by reviewing the list of cases/eDossiers in the dialog box. Select the check box next to "Send a message to the reviewers gaining access." so that the reviewers gaining access to the cases are notified it is time to begin their review.

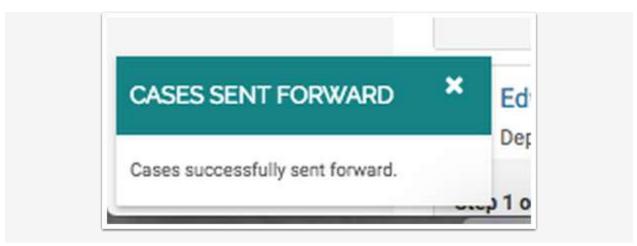
Please confi	rm you wish to send the following cases forward to the next step in the review process.
Erin Comba	ccla is moving forward to "Candidate Review"
Brandon Go	rtman is moving forward to 'Architecture Department Review'
John Jacob	son is moving forward to "Candidate Review"
Send a n	nessage to the reviewers gaining access.

You can either personalize a message sent to the reviewers gaining access or use the default message that appears. When done you can either preview your message and/or send it.

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Click "Edit" to go back to the message, or click "Continue" to send message and cases forward.

Sent on-screen confirmation message will appear in lower left-hand corner of your screen.



Once the case/eDossier has been sent forward you will lose access to edit the review letter or other uploaded supplementary materials.

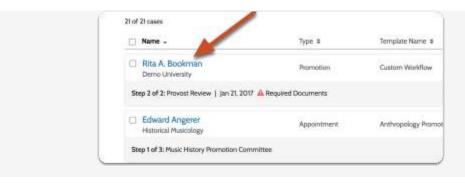
Accessing Subsequent Reviewer Letters

All review letters will be shared with each step of the review electronically (without having to send a paper copy outside of the system). Each step of the review process (**PRC Chairperson, Department Chairperson/School Director, and Dean**) will also not lose access to view the faculty candidate's case/eDossier after completing their review/submitting their review letter until the review completes.

Once logged into your Faculty180 Account, select ''Cases'' under Review, Promotion & Tenure on the left hand navigation bar.

Home	 Welcome back, E
Review, Promotion and 1	
Cases	Your Action Iter

You will see a list of cases that are available to you. Click the name of the candidate to view case materials.



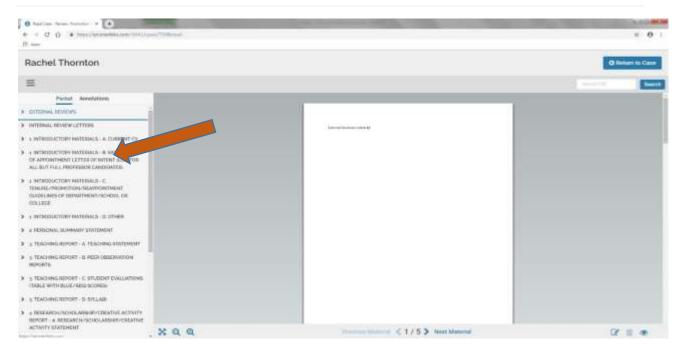
On the ''Case Materials' tab of the case page, you can read documents that were submitted by the candidate or committee members.

Click "Read Case" to load all accessible case materials into our document viewer where they can be viewed online.



Any available internal review letters, external review letters, and/or Reviewer Inserted Material, if applicable will appear at the top of the case materials/eDossier.

Click on the case material that you would like to view, and it will display on your screen.



Need Help? - Important Contact Information

College of Arts and Sciences

Jennifer Visocky O'Grady - 216/687-5580 or j.visocky@csuohio.edu

Conor McLennan - 216/875-9832 or c.mclennan@csuohio.edu

College of Business

Tim Arndt - 216/687-4779 or t.arndt@csuohio.edu

College of Engineering

George Chatzimavroudis - 216/687-6899 or g.chatzimavroudis@csuohio.edu

College of Health

Sheila Patterson -

College of Law

Brian Ray –

Office of the Provost

Danielle Ruiz - <u>216/687-9390</u> or