

# Reviewer eDossier Instructions

(Revised April 2020)

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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.



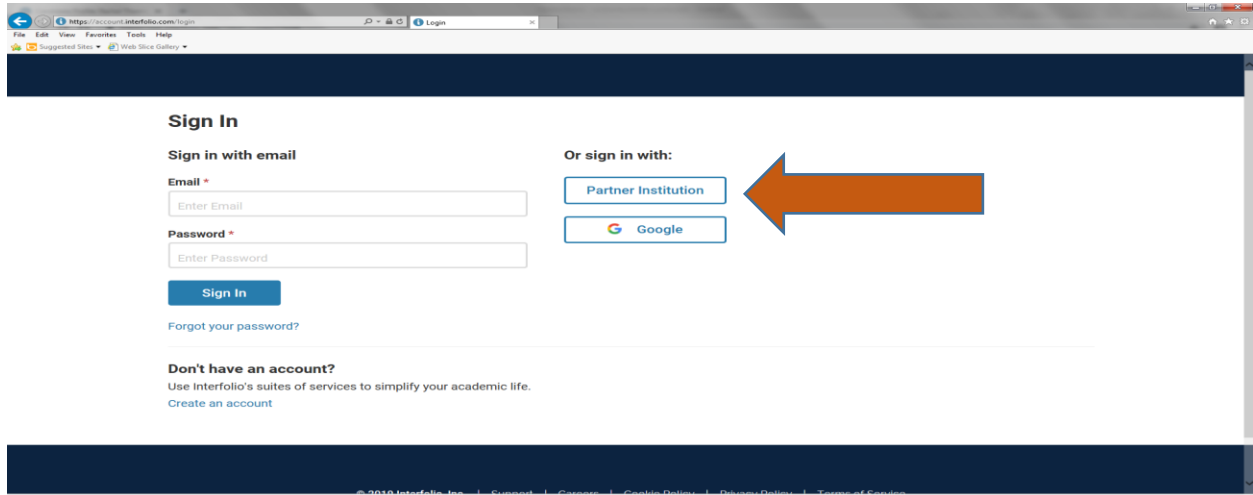
Tommie Barclay's case is available for review.

**SIGN IN**

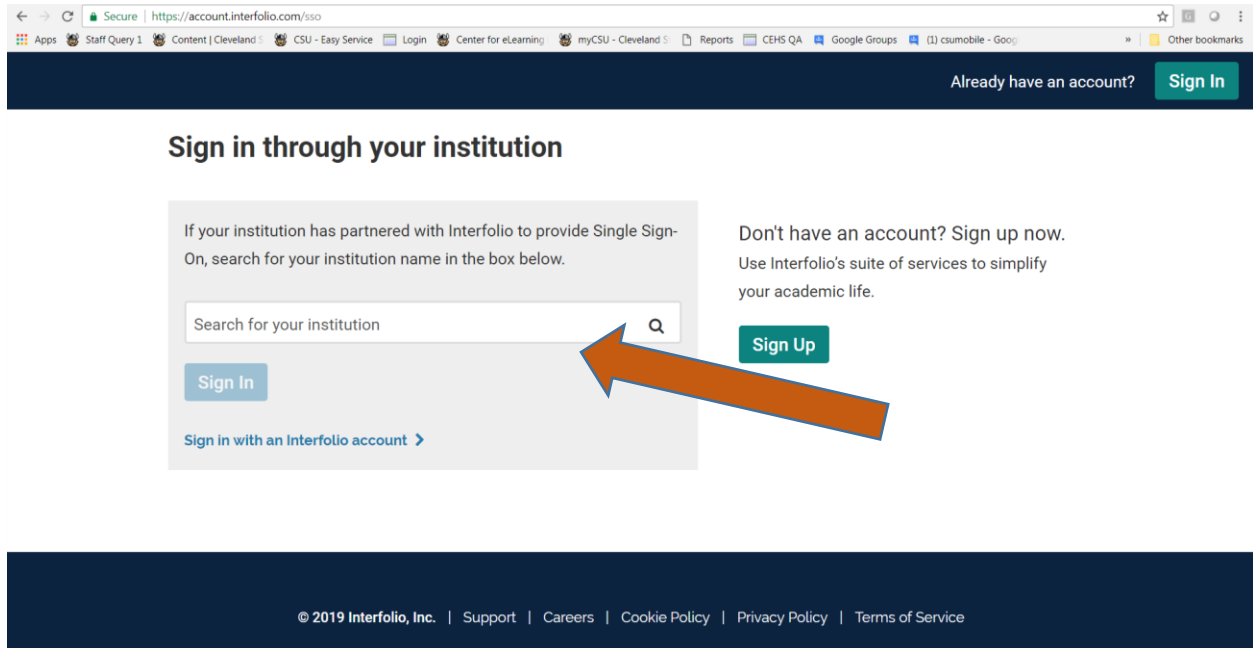
The candidate has submitted their case and it is now available for your committee to review.

**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”.

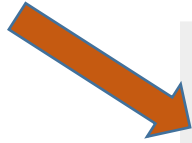


Type in “Cleveland State University” in the “Search for your institution” field.





### Sign in through your institution



If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.

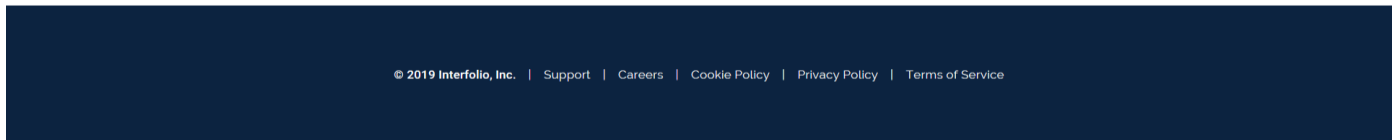
Cleveland State University

Sign In

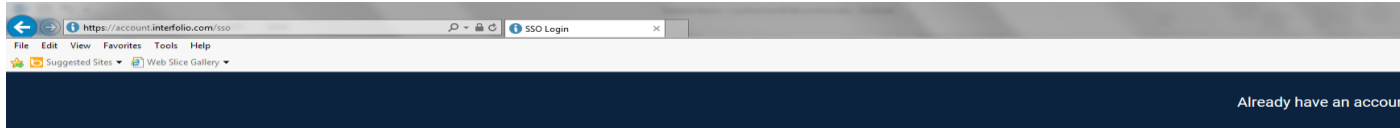
[Sign in with an Interfolio account >](#)

Don't have an account? Sign up now.  
Use Interfolio's suite of services to simplify your academic life.

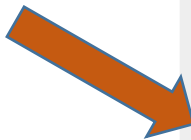
[Sign Up](#)



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



### Sign in through your institution



If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.

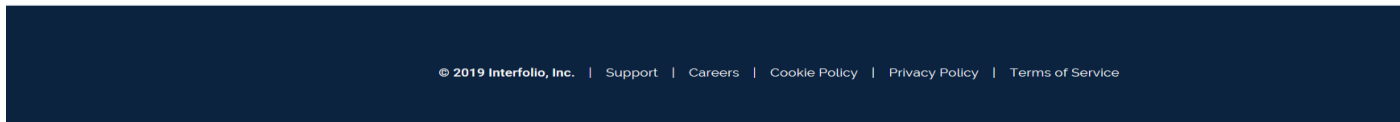
  

Sign In

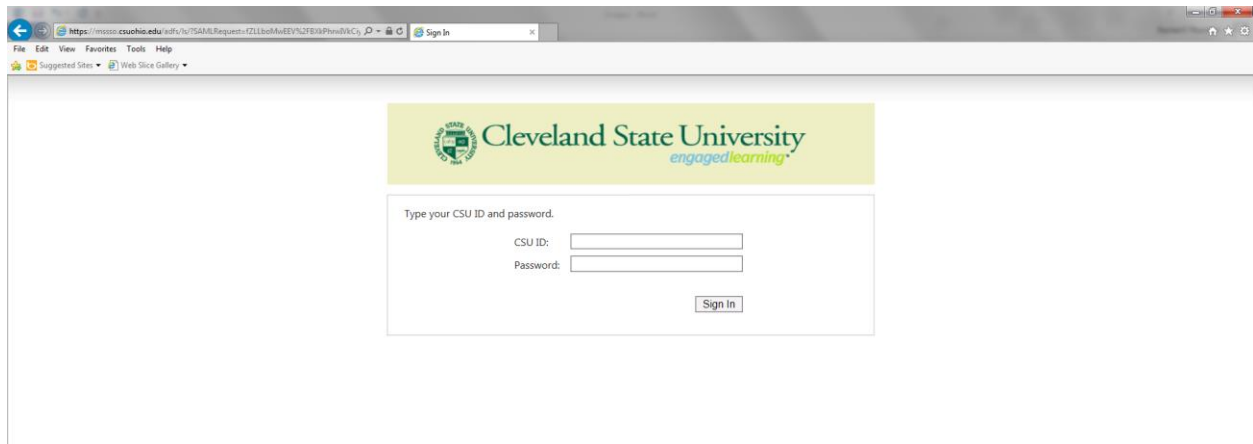
[Sign in with an Interfolio account >](#)

Don't have an account? Sign up now.  
Use Interfolio's suite of services to simplify your academic life.

[Sign Up](#)



Sign in with your CSU credentials.



The screenshot shows a web browser window with the URL <https://ms300.csuohio.edu/edrf/ta/75AM/Request=7ZLLboMwEY%2FE9PPhw8V/Cs>. The browser's address bar and menu bar are visible. The main content area displays the Cleveland State University logo and the text "engagedlearning". Below the logo is a sign-in form with the following elements:

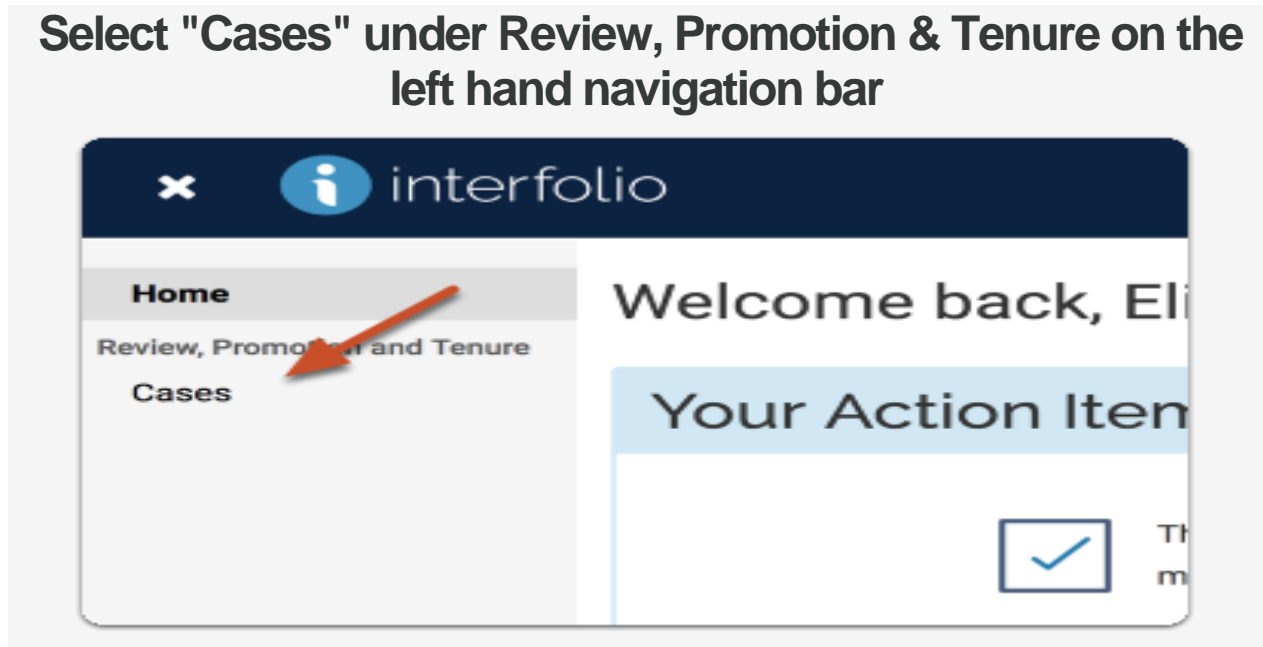
- Text: "Type your CSU ID and password."
- Label: "CSU ID:" followed by a text input field.
- Label: "Password:" followed by a text input field.
- Button: "Sign In"

# View 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.

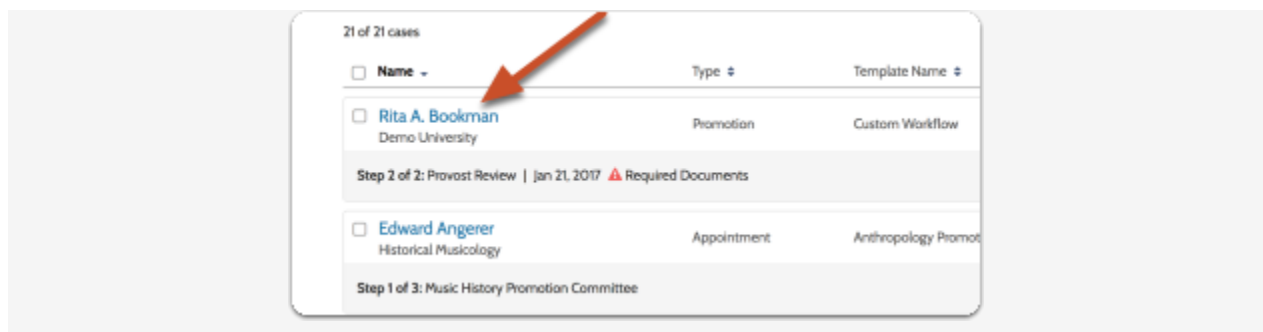
Once logged into your Faculty180 Account,

Select "Cases" under Review, Promotion & Tenure on the left hand navigation bar



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

Click the name of the candidate to view case materials



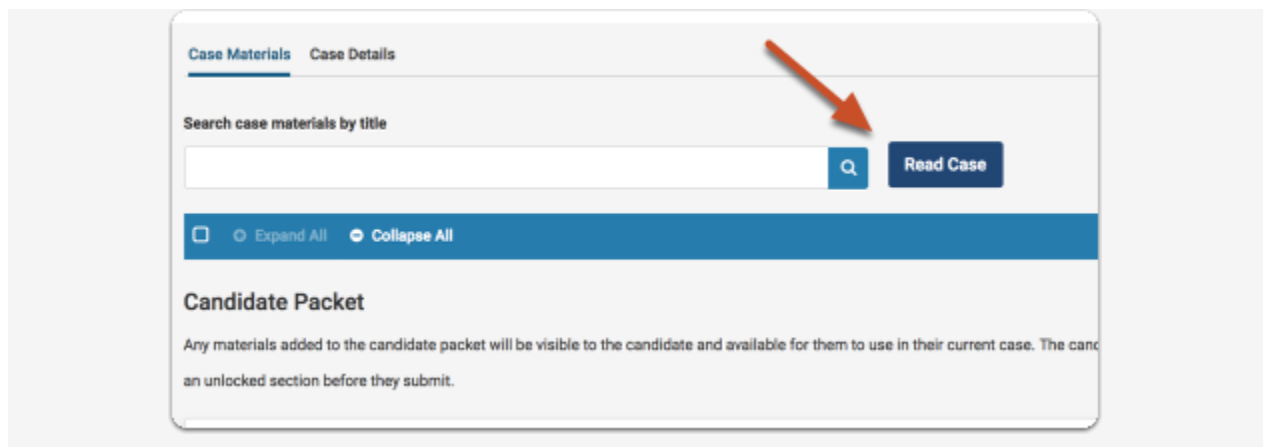
## Accessing materials:

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.



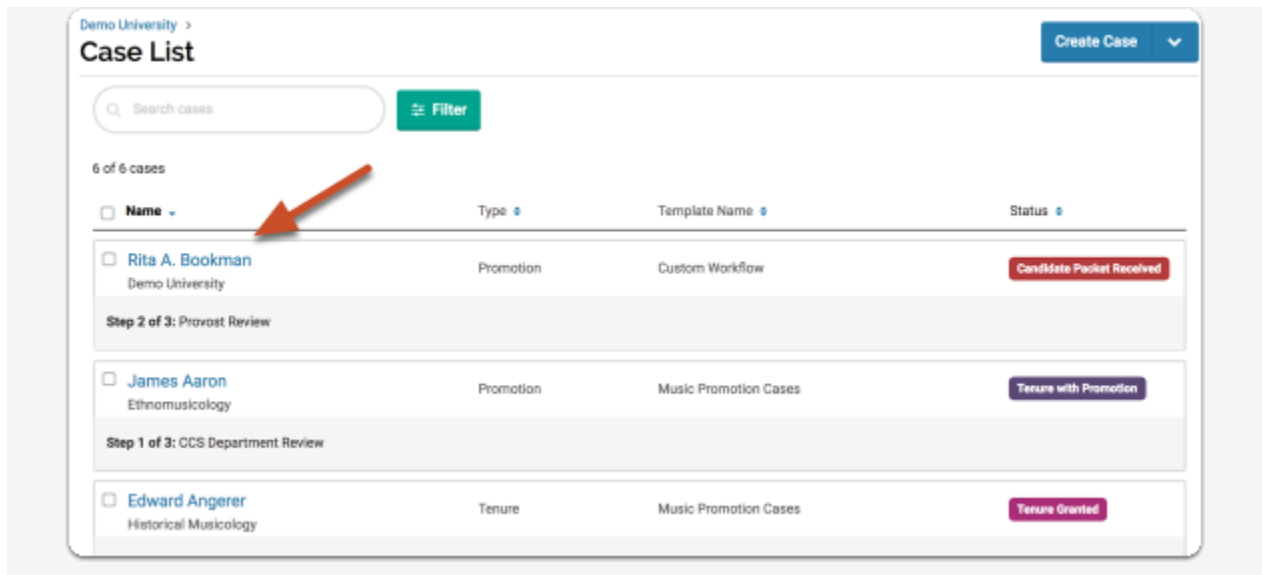
The document viewer displays all materials organized by sections. Note that you can search through the PDF files of materials, and leave annotations on the materials.

# Make Notes on Case Packet/eDossier Materials and Export Your Annotations

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.

## Open the case you want to review

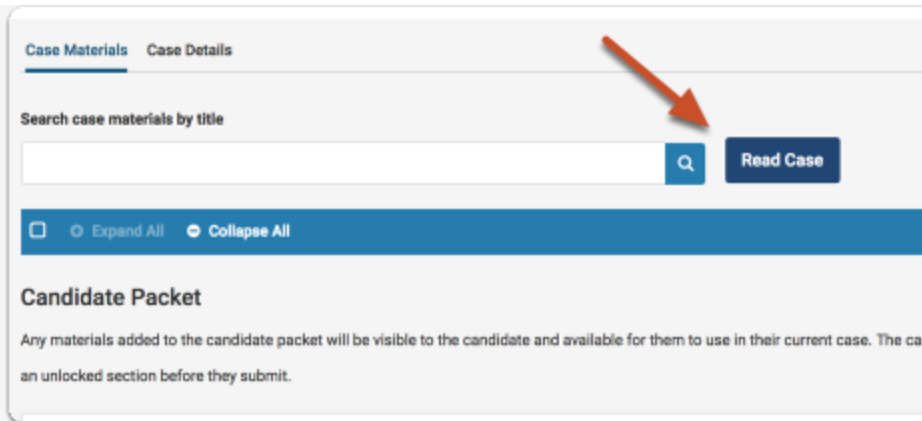


The screenshot shows a web interface for a "Case List" at "Demo University". At the top right is a "Create Case" button. Below it is a search bar labeled "Search cases" and a "Filter" button. The text "6 of 6 cases" is displayed. The main content is a table with the following columns: "Name", "Type", "Template Name", and "Status".

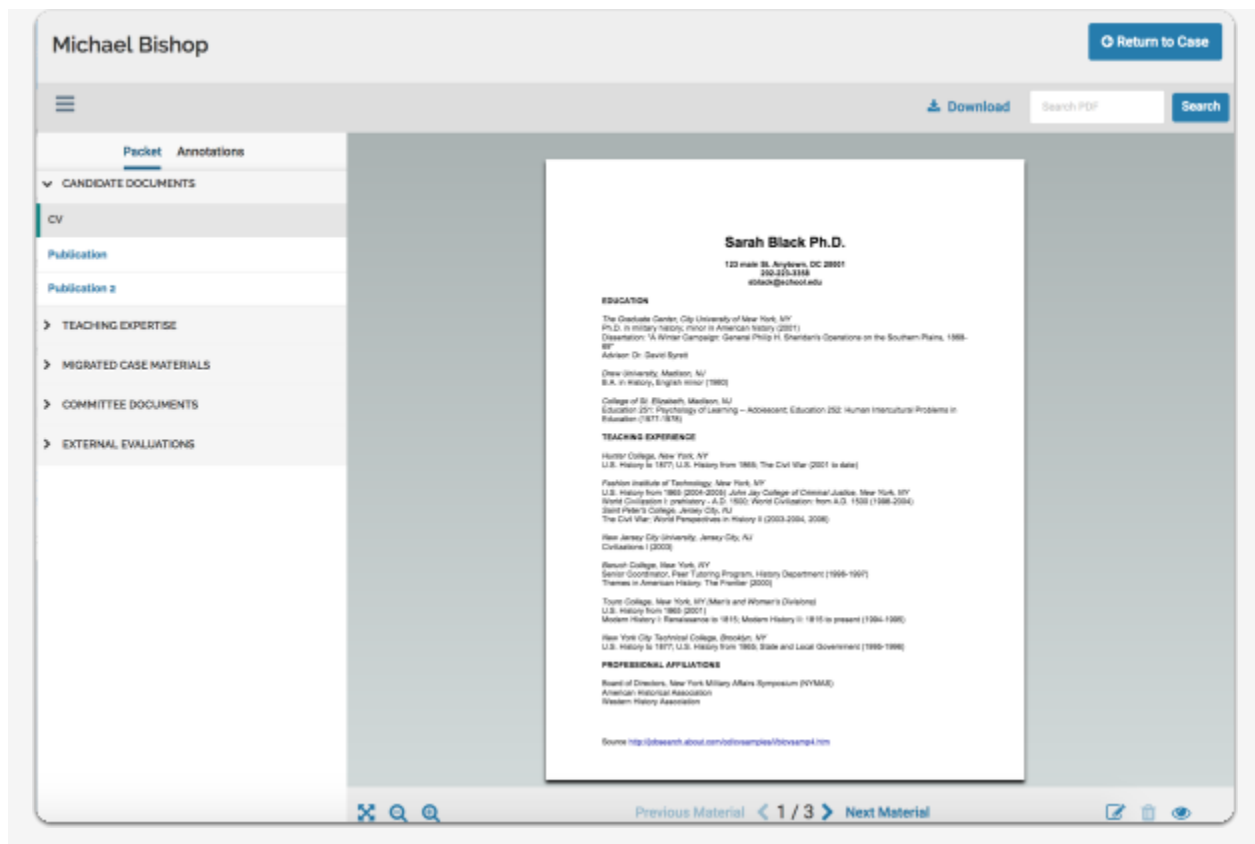
<input type="checkbox"/> Name	Type	Template Name	Status
<input type="checkbox"/> Rita A. Bookman Demo University Step 2 of 3: Provost Review	Promotion	Custom Workflow	Candidate Packet Received
<input type="checkbox"/> James Aaron Ethnomusicology Step 1 of 3: CCS Department Review	Promotion	Music Promotion Cases	Tenure with Promotion
<input type="checkbox"/> Edward Angerer Historical Musicology	Tenure	Music Promotion Cases	Tenure Granted

**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**

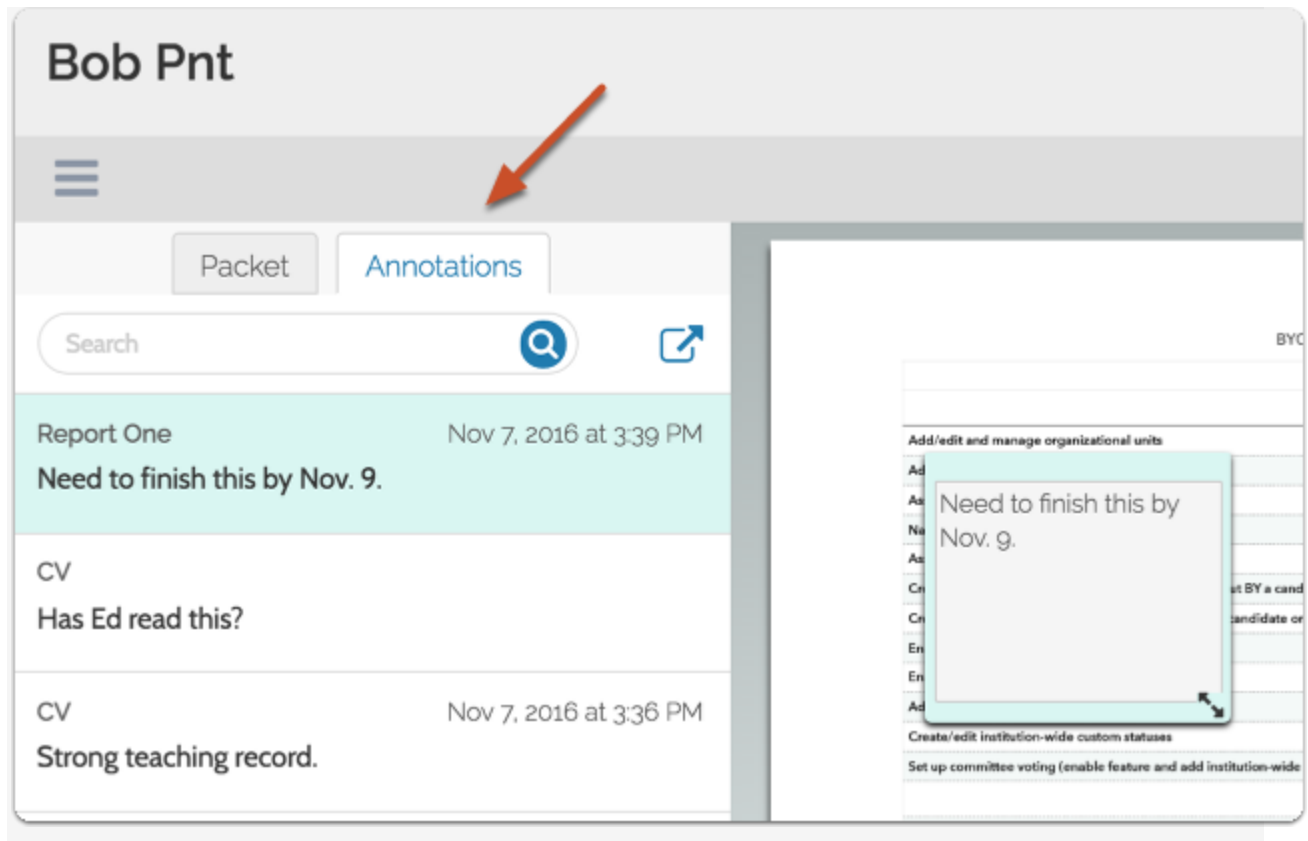
You can also click on the title of a document to open that specific document in the document viewer.



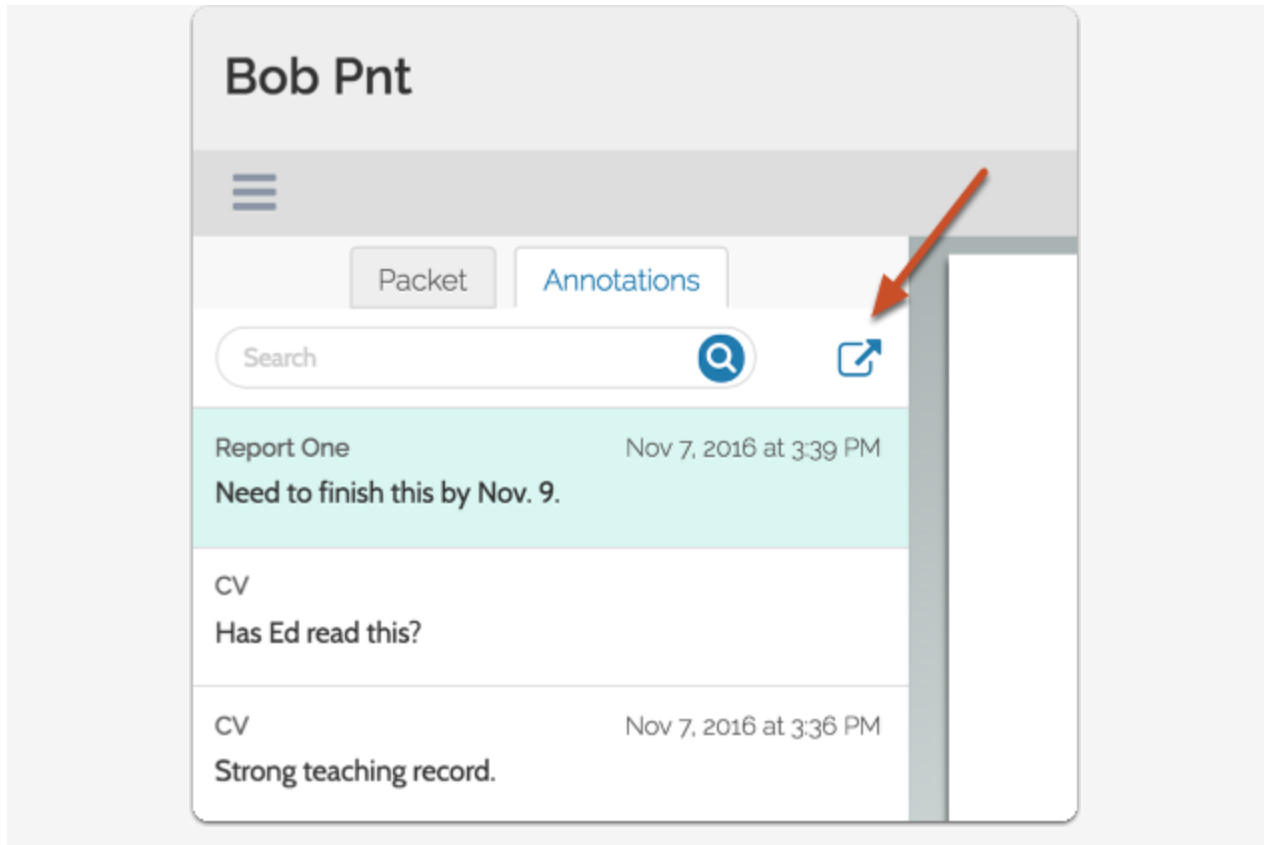
The document viewer displays all materials organized by sections. Note that you can download materials (if enabled), search through the PDF files of materials, and leave annotations on the materials.



**Annotations appear on their own tab in the viewer**



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



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



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

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

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

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- 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



### Stickie notes:

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



### "Point" (arrow) notes:

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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.

luctus pharetra.

Pellentesque eget est lorem. Etiam scelerisque est in lectus eleifend, venenatis elementum. Vestibulum dolor quam, faucibus ut risus eu, pharetra cursus ipsum. Mauris tristique nibh magna. Vestibulum sagittis. Cras vulputate sem bibendum elit pretium, sit amet blandit ipsum blandit. Aliquam erat volutpat. Aliquam nibh eu, finibus leo. Donec vel magna sed libero vestibulum feugiat hendrerit non orci. Vestibulum suscipit lobortis. Nunc in nibh venenatis, sollicitudin velit eu, facilisis nibh. Aliquam quis aliquam interdum ultrices tortor, eget dapibus mi suscipit eget. Interdum et malesuada fames ac ante ipsum nibh faucibus.

This note points to the Latin word "etiam" which can translate as also, even, or still...



### "Area" notes:

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



## Research Interests

- Writing Pedagogy
- Performance Ethnography
- Local Aesthetics
- Ethnopoetics
- Auto-ethnography
- American Popular Music
- Punk Rock Music
- Heavy Metal Music
- Shock Rock
- Southern Regional Identity

Research is her strongest area. Makes her a good fit for our needs...



### "Text" notes:

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

Ethnopoetics

Auto-ethnography

American Popular Music

Punk Rock Music

Heavy Metal Music

Shock Rock

Southern Regional Identity

Music and Gothic Modes of Representation

19<sup>th</sup> Century Opera

Seems broad

I've recently completed my dissertation; "A Socioesthetics of Punk: Theorizing Performance," a performance ethnography addressing issues of southern regional identity.






49 / 50



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

est lorem. Etiam scelerisque est in lectus eleifend, venenatis elementum ligula dictum. uam, faucibus ut risus eu, pharetra cursus ipsum. Mauris tristique nibh malesuada maximus utate sem bibendum elit pretium, sit amet blandit ipsum blandit. Aliquam eget arcu sagittis, nibus leo. Donec vel n eugiat hendrerit non orci. In luctus tellus a unc in nibh venenatis nibh. Aliquam quis aliquam sem. Fusce malesuada fames ac ante ipsum primis in portor, eget dapibus mi

This note points to the latin word "etiam" which translates as also, even, or still...

< 19 / 19 >   

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

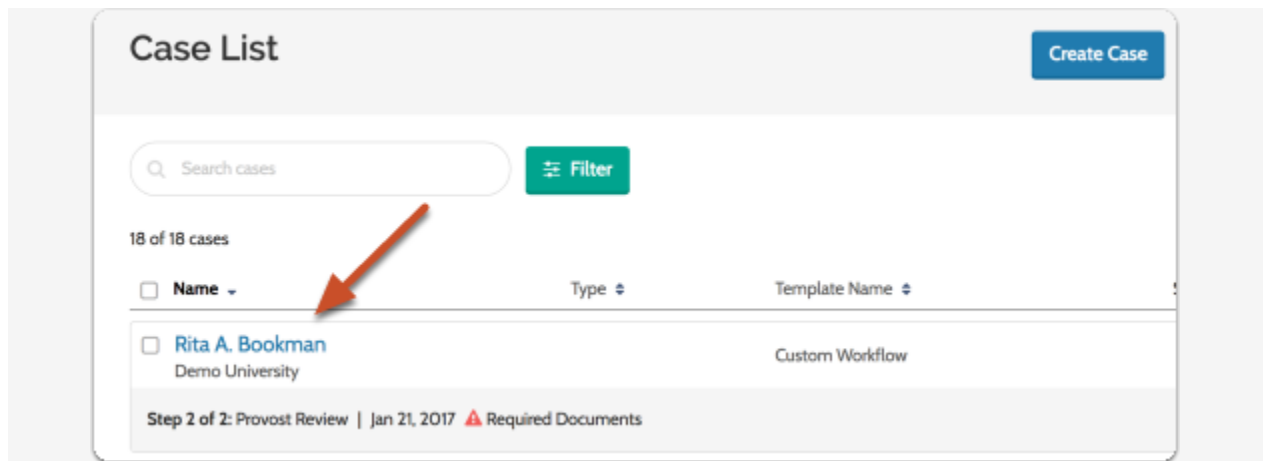
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# Uploading Internal Review Letters

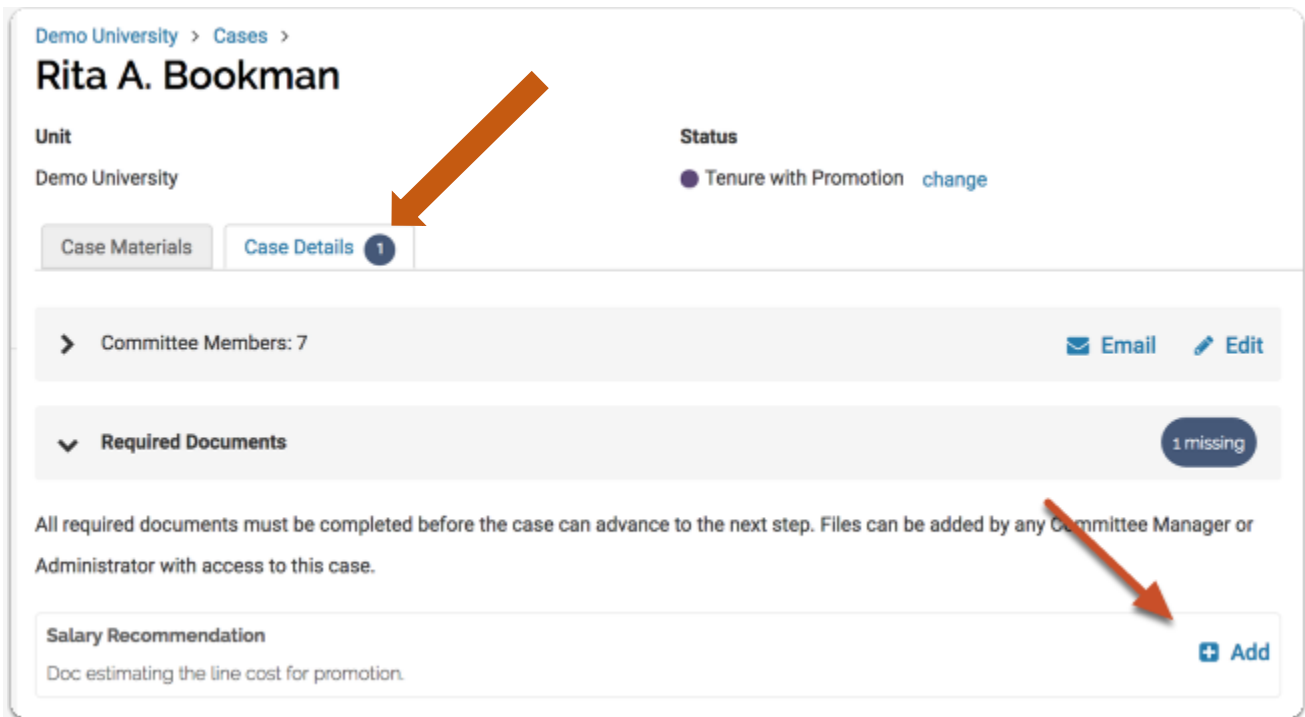
As a committee manager (PRC Chairperson or Department Chairperson/School Director, or Dean), you will be responsible for uploading the signed review letter for the faculty candidate you are reviewing. There is also a space to upload any additional reviewer inserted materials.

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

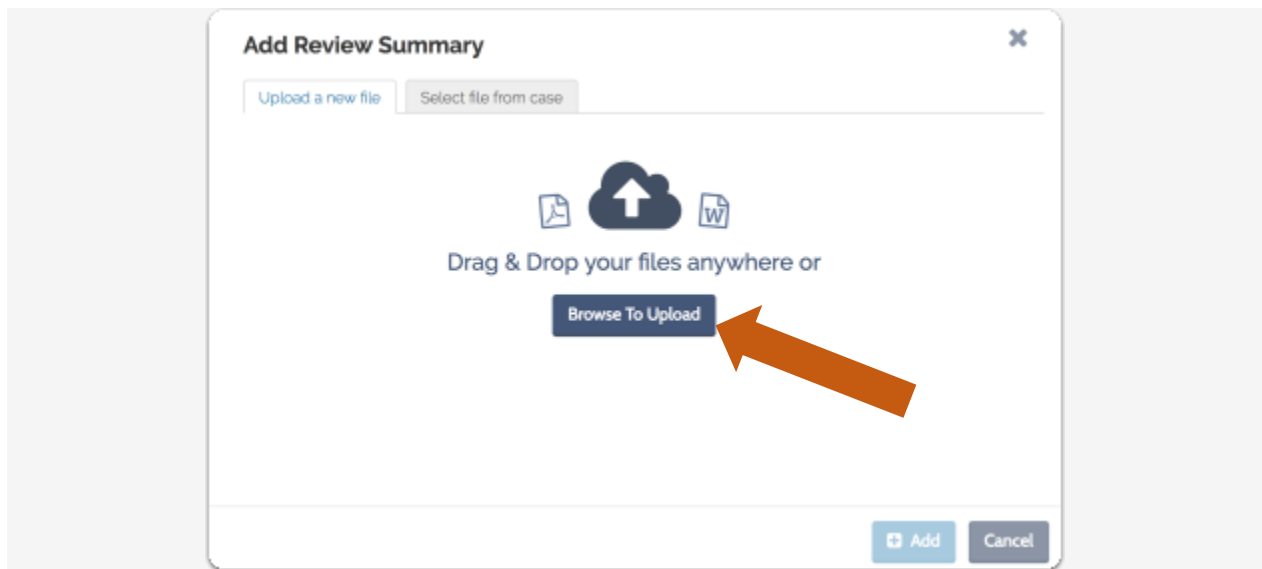


The screenshot shows a 'Case List' interface. At the top right is a blue 'Create Case' button. Below it is a search bar labeled 'Search cases' and a green 'Filter' button. The text '18 of 18 cases' is displayed. A table with columns 'Name', 'Type', and 'Template Name' is shown. The first row contains the name 'Rita A. Bookman' (with 'Demo University' below it) and 'Custom Workflow'. A red arrow points to the name 'Rita A. Bookman'. At the bottom of the table, there is a status bar: 'Step 2 of 2: Provost Review | Jan 21, 2017 ⚠ Required Documents'.

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



2. Browse to upload a new file:



3. Select the section of the packet in which to add the document (in this case "Internal Review Letters"). Select "Add".

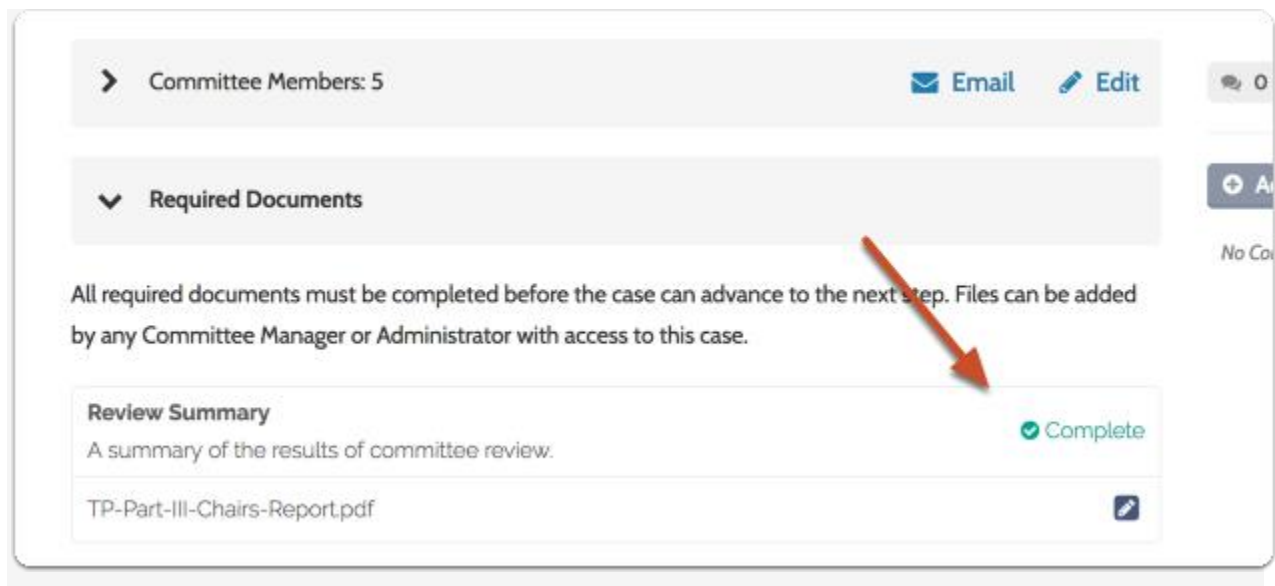
### Add a. External Review Letters ✕

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

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

<b>Name *</b>	<b>Section *</b>
<input type="text" value="CPRC Recommendation"/>	<div><input type="text" value="Internal Review Letters"/> <span>▼</span></div> <ul style="list-style-type: none"><li>External Reviews</li><li><b>Internal Review Letters</b></li><li>Reviewer Inserted Material, if applicable</li></ul>

Once uploaded, the document requirement will be labeled "Complete"



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).

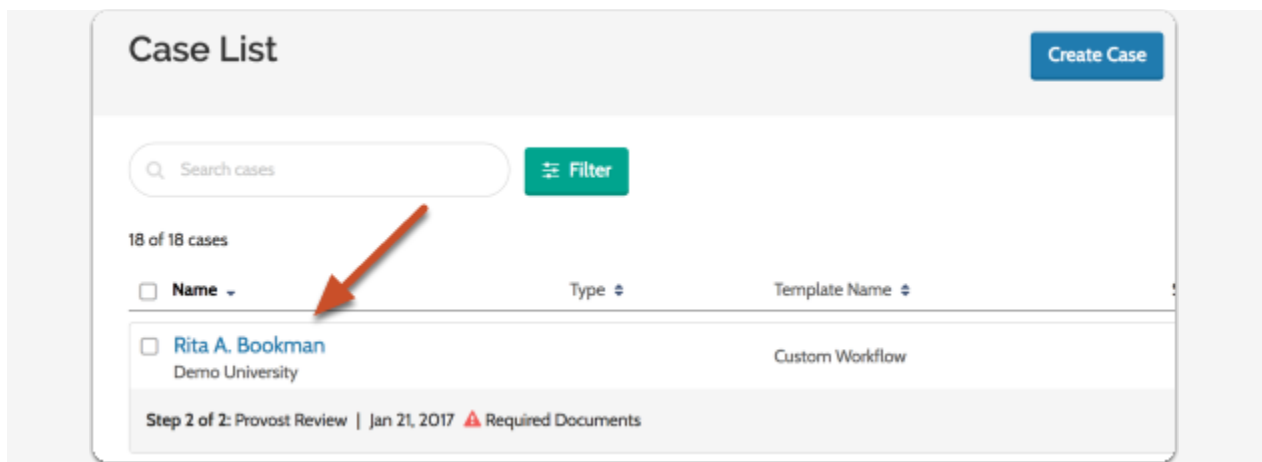


# How to Add Supplementary Materials

**How to add more than one document (other than the one required review letter; e.g. 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):**

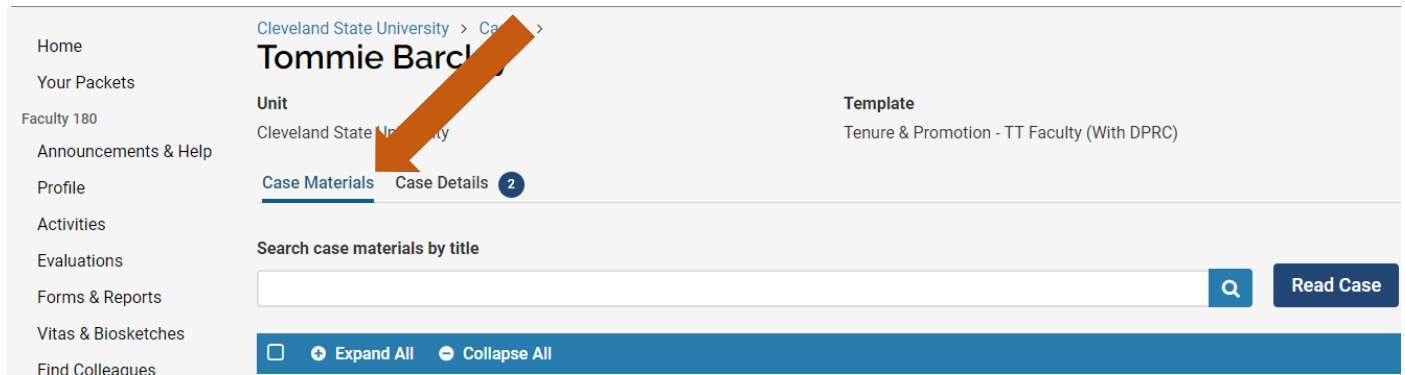
As a committee manager (Chair of the PRC, Chair of Department/School, or Dean) you may wish to add more than the one required reviewer letter to the faculty candidate's eDossier to be accessible/viewed by other reviewers (e.g. supplementary materials such as materials requested by the DPRC/CPRC including 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 to**



The screenshot shows a 'Case List' interface. At the top right is a 'Create Case' button. Below it is a search bar labeled 'Search cases' and a 'Filter' button. The text '18 of 18 cases' is displayed. A table with columns 'Name', 'Type', and 'Template Name' is shown. The first row contains the name 'Rita A. Bookman' (with 'Demo University' below it) and 'Custom Workflow'. An orange arrow points to the name 'Rita A. Bookman'. At the bottom, a status bar reads 'Step 2 of 2: Provost Review | Jan 21, 2017 ⚠ Required Documents'.

## 1. Open the "Case Materials" tab

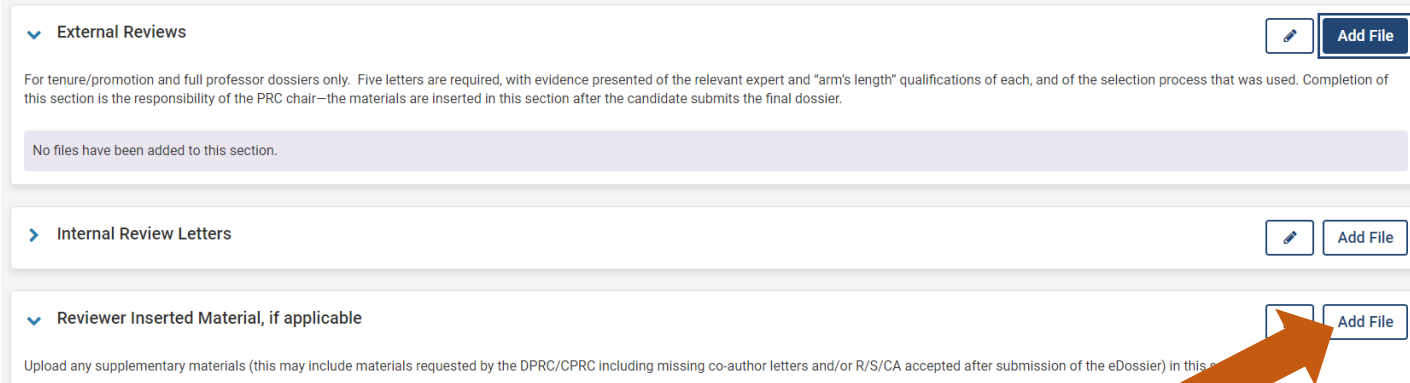


The screenshot shows a web interface for a candidate named Tommie Barclay. The left sidebar contains navigation options: Home, Your Packets, Faculty 180, Announcements & Help, Profile, Activities, Evaluations, Forms & Reports, Vitas & Biosketches, and Find Colleagues. The main content area shows the candidate's name, unit (Cleveland State University), and template (Tenure & Promotion - TT Faculty (With DPRC)). Below this, there are two tabs: "Case Materials" (which is selected and underlined) and "Case Details" (which has a notification badge with the number 2). A search bar labeled "Search case materials by title" is present, along with a "Read Case" button. At the bottom of the main content area, there are expand/collapse controls: a square icon, a plus sign, "Expand All", a minus sign, and "Collapse All".

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

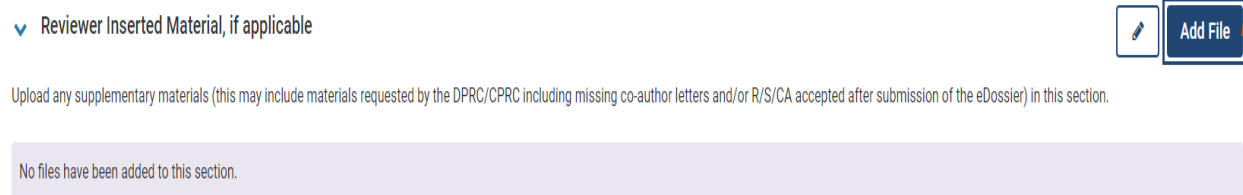
### Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.



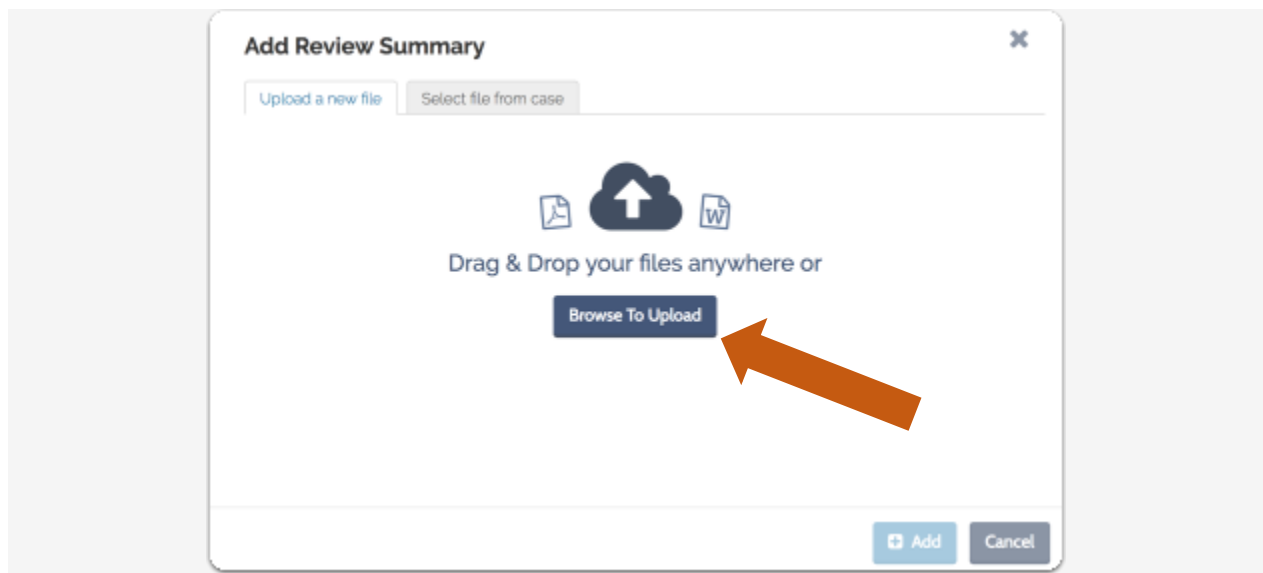
The screenshot shows three internal sections, each with an "Add File" button. The first section is "External Reviews", which has a description: "For tenure/promotion and full professor dossiers only. Five letters are required, with evidence presented of the relevant expert and 'arm's length' qualifications of each, and of the selection process that was used. Completion of this section is the responsibility of the PRC chair—the materials are inserted in this section after the candidate submits the final dossier." Below the description is a message: "No files have been added to this section." The second section is "Internal Review Letters". The third section is "Reviewer Inserted Material, if applicable", with a description: "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." Two large orange arrows point from the right side of the page to the "Add File" buttons of the "External Reviews" and "Reviewer Inserted Material, if applicable" sections.

## In this case, "Reviewer Inserted Material, if applicable"

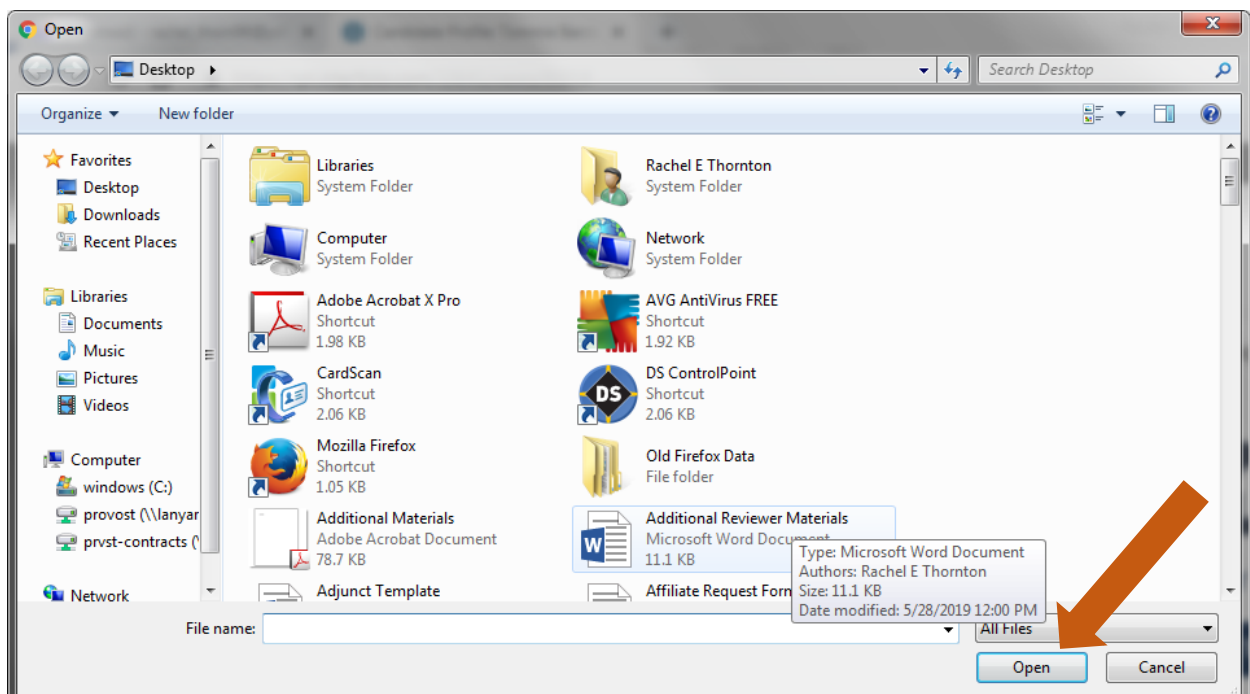


This is a close-up of the "Reviewer Inserted Material, if applicable" section. It shows the section title, a description: "Upload any supplementary materials (this may include materials requested by the DPRC/CPRC including missing co-author letters and/or R/S/CA accepted after submission of the eDossier) in this section.", and a message: "No files have been added to this section." A large orange arrow points from the right side of the page to the "Add File" button.

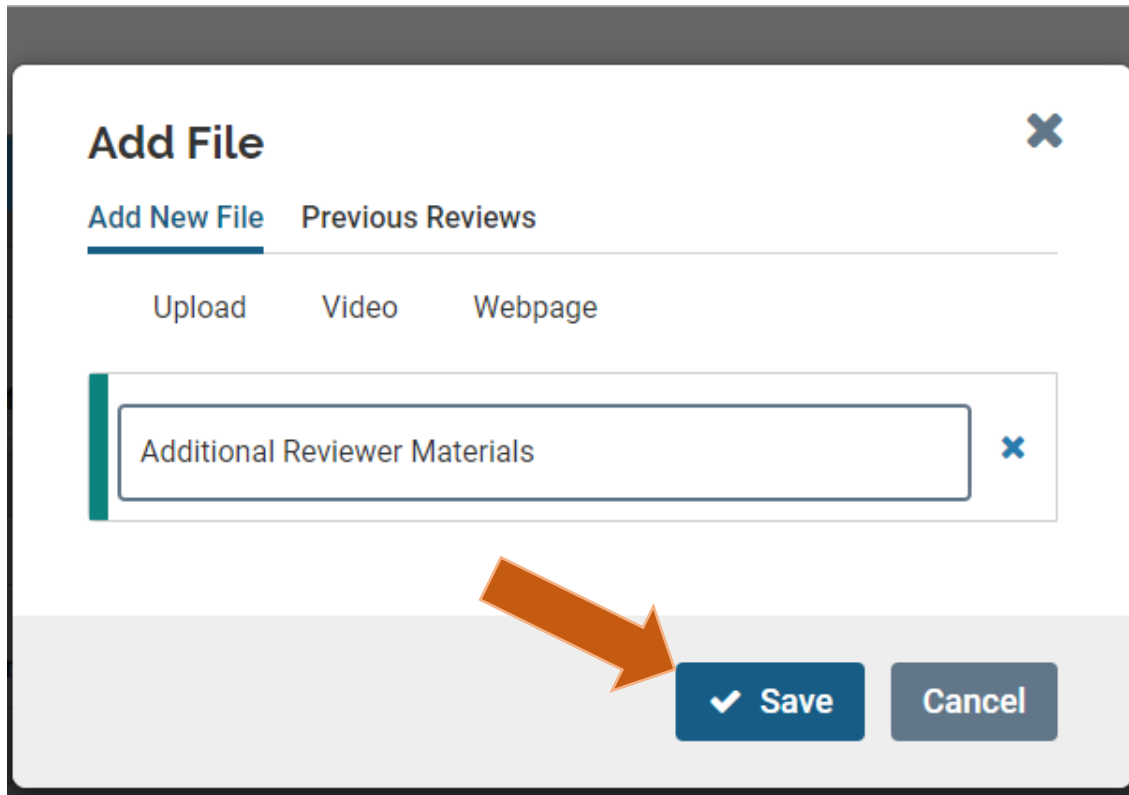
### 3. Browse to upload a new file



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



5. Select “Save”.



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

## Receiving Notification Email/Beginning Your Review

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.

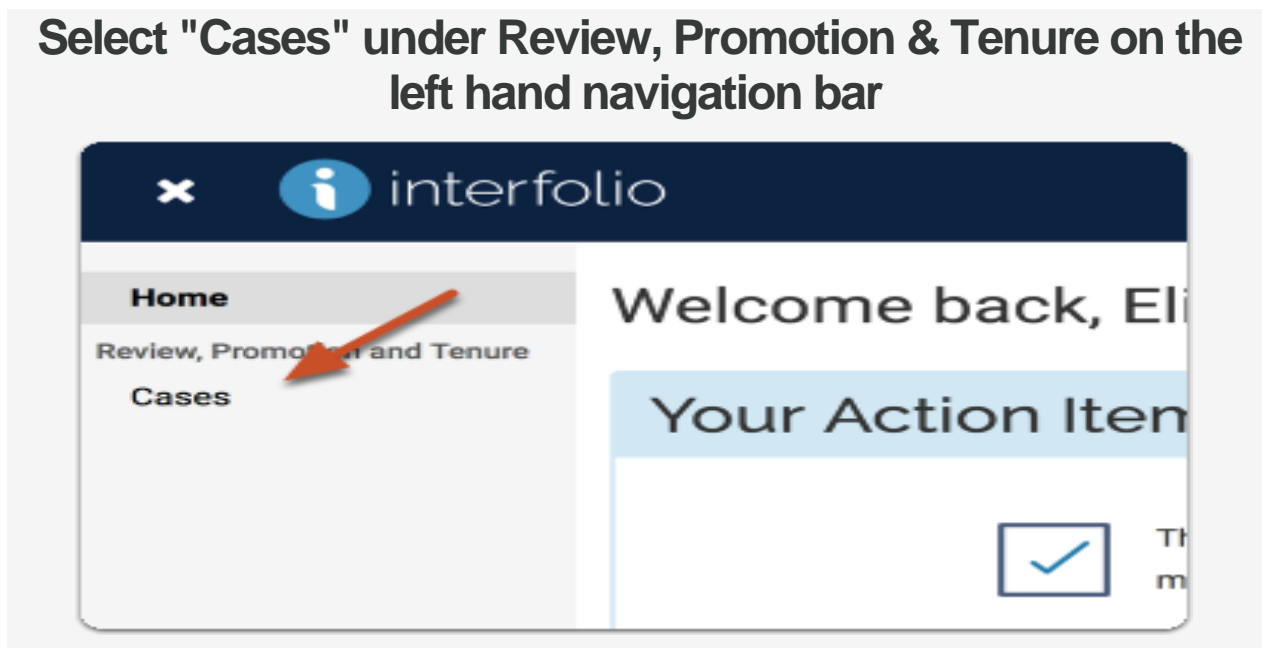
**SIGN IN**

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

Powered by Interfolio | Support

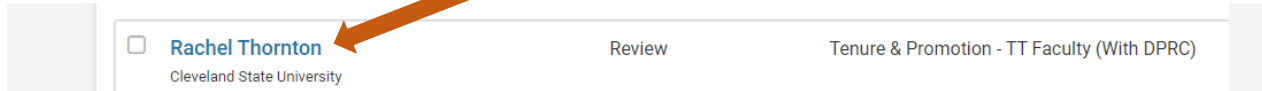
Once logged into your Faculty180 Account,

Select "Cases" under Review, Promotion & Tenure on the left hand navigation bar

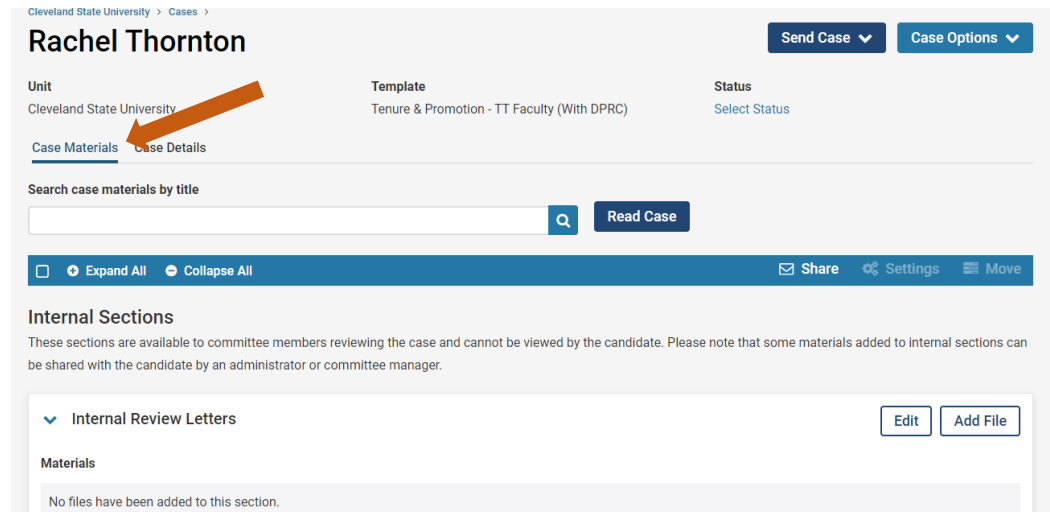


You will see a list of cases that are available to you

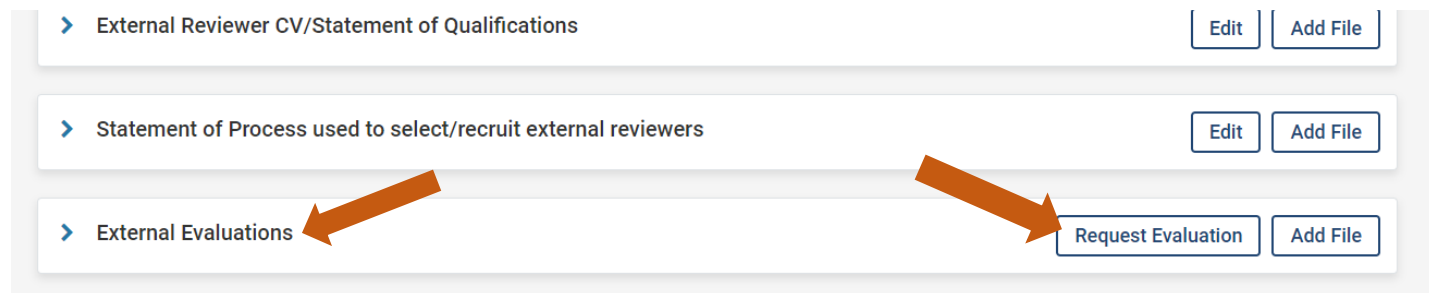
Click the name of the candidate to view case materials



1. You will automatically be directed to the “Case Materials” tab for the candidate’s case you are viewing



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



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

**Request Evaluation** ✕

Use this message to request an evaluation of the candidate. You can include a personal message to the evaluator and documents to aid them in their review. Once completed, evaluators submit their reviews through Interfolio's proprietary system.

<b>Evaluator First Name</b> First Name	<b>Evaluator Last Name</b> Last Name	<b>Evaluator Email</b> Email Address
---	---	---

[Add Another Evaluator](#)

<b>From Name</b> Cleveland State University	<b>Reply-to</b> r.e.thornton82@csuohio.edu
--	---

**Subject**  
Message Subject

**Message**

Files + Add

**Details**

**Deadline** ⓘ  
Mmm d, yyyy 📅 ⓘ

**Access** ⓘ  
Administrators & Entire Committee ▼

👁️ Preview ✉️ Send 🚫 Cancel





5. 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.

**Request Evaluation** ✕

Use this message to request an evaluation of the candidate. Your request can include a personal message to the evaluator and documents to aid the evaluator in their review. Once completed, evaluators submit their reviews through Interfolio's secure delivery system.

**Evaluator First Name**  **Evaluator Last Name**  **Evaluator Email**

[+ Add Another Evaluator](#)

**From Name**  **Reply-to**

**Subject**

**Message**

[Date]  
Appropriate inside address  
Dear --  
In response to his/her request for tenure and/or promotion to the rank of Associate Professor (Professor), the Peer Review Committee of the College/Department of \_\_\_\_\_ has initiated an external review of Dr. \_\_\_\_\_ credentials. Having identified you as a leader in the [insert candidate's field], the Committee is grateful for your willingness to provide a candid evaluation of Dr. \_\_\_\_\_'s professional accomplishments based on an analysis of his/her curriculum vitae and a representative sampling of his/her work.  
body p

**Files** [+ Add](#)

**Details**

**Deadline**

**Access**

[Preview](#) [Send](#) [Cancel](#)

6. To select files individually select the blue plus button located to the left of each file (All faculty have been notified that they should contact their PRC chair or department chair (whoever is responsible for sending materials to external evaluators) outside of the system to let them know the names of the files that were included in their preliminary dossiers that they want sent to external reviewers or have labeled their materials they wish to have sent “Preliminary Dossier”).

**Files**

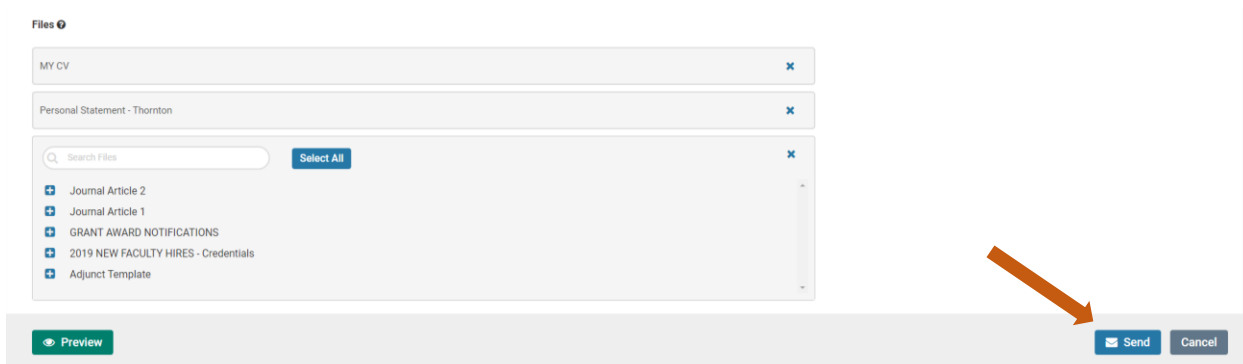
Search Files [Select All](#)

- [+](#) MY CV
- [+](#) Personal Statement - Thornton
- [+](#) Journal Article 2
- [+](#) Journal Article 1
- [+](#) GRANT AWARD NOTIFICATIONS
- [+](#) 2019 NEW FACULTY HIRES - Credentials
- [+](#) Adjunct Template

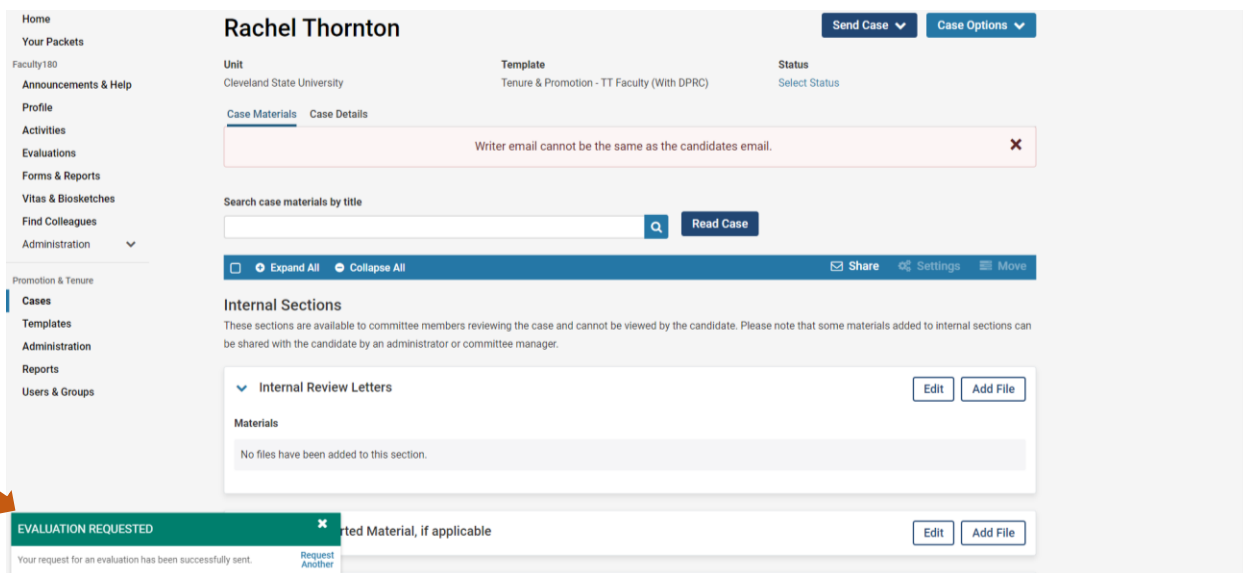
[Preview](#) [Send](#) [Cancel](#)



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



8. 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.



## EVALUATION REQUESTED



Your request for an evaluation has been successfully sent.

[Request Another](#)

# This is what external reviewers will receive in their email



Cleveland State University is conducting a review of Rachel Thornton and has requested a Confidential Evaluation.

I ACCEPT

I DECLINE

Cleveland State University asks that you submit your Confidential Evaluation by **Jun 1, 2020**. If you have questions about this request, please contact [r.e.thornton82@csuohio.edu](mailto:r.e.thornton82@csuohio.edu).

Dear Professor Artbauer,

In response to his/her request for tenure and/or promotion to the rank of Associate Professor (Professor), the Peer Review Committee of the College/Department of \_\_\_\_\_ has initiated an external review of Dr. 's \_\_\_\_\_ credentials. Having identified you as a leader in the [insert candidate's field], the Committee is grateful for your willingness to provide a candid evaluation of Dr. \_\_\_\_\_'s professional accomplishments based on an analysis of his/her curriculum vitae and a representative sampling of his/her work.

Powered by Interfolio | [Support](#) (Ref. #: F72CA64750)

**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.**

- Home
- Deliveries
- Letters
- Materials
- Collections
- Shared with Me

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Program Policies

Letters to Write > Confidential Evaluation Request for: >

## Rachel Thornton

### Request Details

Type: Confidential Evaluation  
Requested by: Cleveland State University

Message from Cleveland State University:

Dear Professor Artbauer,

In response to his/her request for tenure and/or promotion to the rank of Associate Professor (Professor), the Peer Review Committee of the College/Department of \_\_\_\_\_has initiated an external review of Dr. 's\_\_\_\_\_ credentials. Having identified you as a leader in the [insert candidate's field], the Committee is grateful for your willingness to provide a candid evaluation of Dr. \_\_\_\_\_'s professional accomplishments based on an analysis of his/her curriculum vitae and a representative sampling of his/her work.



**I accept, I will submit an evaluation.**  
I've changed my mind and decline to submit an evaluation.



**Due June 1, 2020**  
You can not submit after the due date.

### Supporting Documents

<p><b>MY CV</b> ApplicantDocument</p>	<p><a href="#">View</a></p> <p><a href="#">Download</a></p>
<p><b>Personal Statement - Thornton</b> ApplicantDocument</p>	<p><a href="#">Download</a></p>

### 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.

- Home
- Deliveries
- Letters
- Materials
- Collections
- Shared with Me

Dear Professor Artbauer,

In response to his/her request for tenure and/or promotion to the rank of Associate Professor (Professor), the Peer Review Committee of the College/Department of \_\_\_\_\_has initiated an external review of Dr. 's\_\_\_\_\_ credentials. Having identified you as a leader in the [insert candidate's field], the Committee is grateful for your willingness to provide a candid evaluation of Dr. \_\_\_\_\_'s professional accomplishments based on an analysis of his/her curriculum vitae and a representative sampling of his/her work.



**I accept, I will submit an evaluation.**  
I've changed my mind and decline to submit an evaluation.



**Due June 1, 2020**  
You can not submit after the due date.

### Supporting Documents

<p><b>MY CV</b> ApplicantDocument</p>	<p><a href="#">View</a></p> <p><a href="#">Download</a></p>
<p><b>Personal Statement - Thornton</b> ApplicantDocument</p>	<p><a href="#">Download</a></p>

### Evaluation

[Select File for Upload](#)

[Read about our accepted file types.](#)

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.



---

The evaluation you requested on behalf of Rachel Thornton has been uploaded.

---

Michael Artbauer uploaded the evaluation you requested on behalf of Rachel Thornton on 2020-03-24 19:14:34 UTC. To view the uploaded document log in below and navigate to the candidate's case.



I ACCEPT

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**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.**

# To send multiple external reviewers the review invite at once

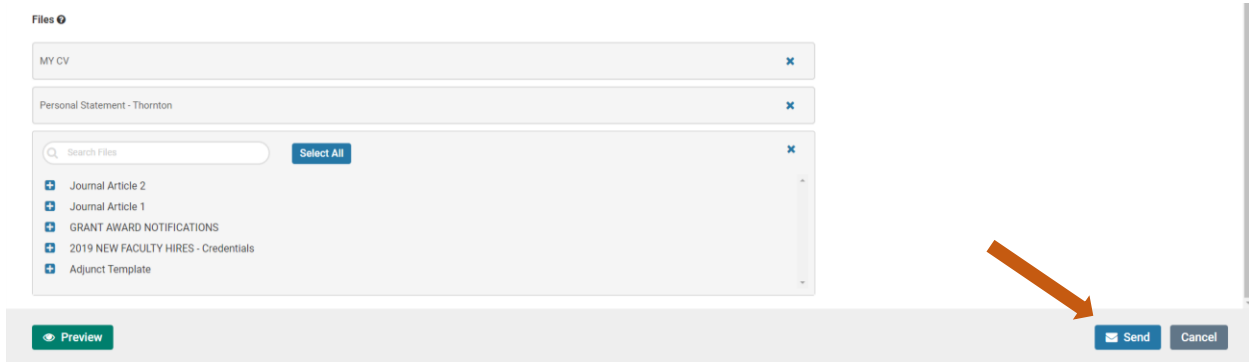
1. If you wish to send the review invite to more than one external reviewer at a time, you will fill out the fields/boxes as suggested in the steps above, but you will select the blue plus sign to the left of “Add Another Evaluator”. Repeat this step until you have added all external reviewers.

The screenshot shows a web browser window with the URL `rpt.interfolio.com/10641/cases/126043`. The page title is "Request Evaluation". Below the title is a sub-header "Request Evaluation" and a brief instruction: "Use this message to request an evaluation of the candidate. Your request can include a personal message to the evaluator and documents to aid the evaluator in their review. Once completed, evaluators submit their reviews through Interfolio's secure delivery system." The form is divided into several sections: "Evaluator First Name" (with a sub-field "First Name"), "Evaluator Last Name" (with a sub-field "Last Name"), and "Evaluator Email" (with a sub-field "Email Address"). Below these fields is a blue button with a plus sign and the text "Add Another Evaluator". An orange arrow points to this button. The "From Name" field is set to "Cleveland State University" and the "Reply-to" field is set to "r.e.thornton82@csuohio.edu". The "Subject" field is labeled "Message Subject". The "Message" field is a large text area with a rich text editor toolbar. To the right of the message field is a "Details" section with a "Deadline" field (placeholder "Mmm d, yyyy") and an "Access" dropdown menu set to "Administrators & Entire Committee". At the bottom of the form are "Preview", "Send", and "Cancel" buttons.

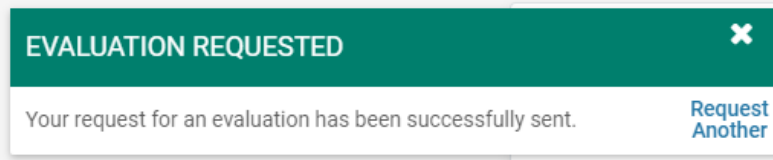
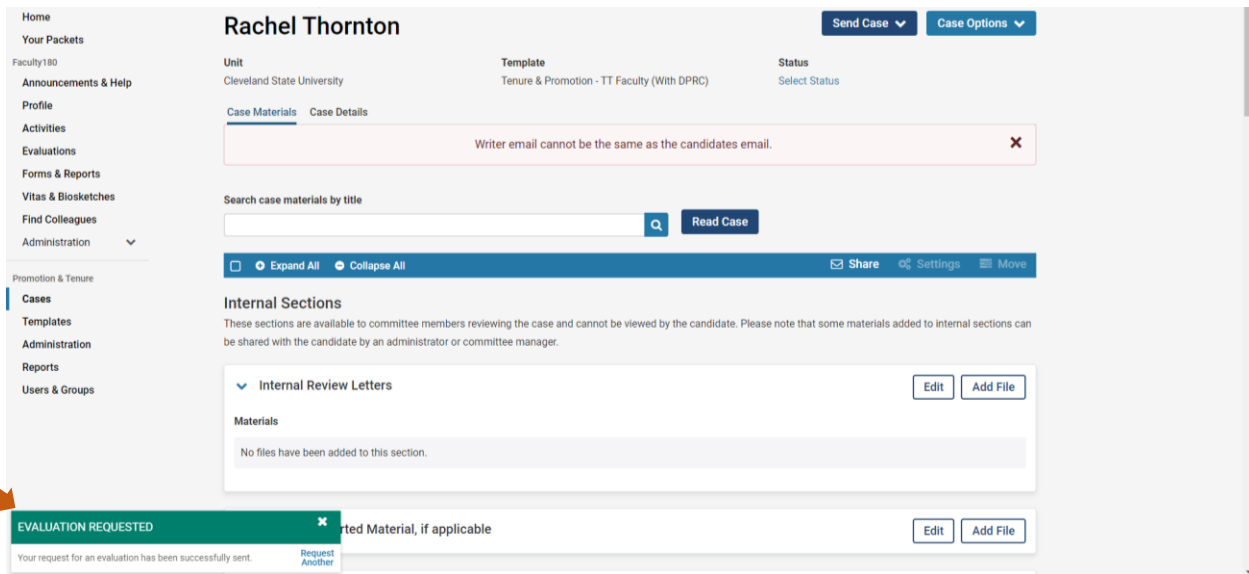
2. In the “Message” section or body of email, you will add the variables below to the greeting (e.g. Dear Professor %EV\_Last% -if you want the last name such as Dear Professor Thornton to appear as the greeting for each separate reviewer)

The screenshot shows the "Message" section of the form. The "Message" field contains the following text: "Dear Professor %EV\_Last%," followed by a blank line, and then a paragraph: "In response to his/her request for tenure and/or promotion to the rank of Associate Professor (Professor), the Peer Review Committee of the College/Department of \_\_\_\_\_ has initiated an external review of Dr. 's \_\_\_\_\_ credentials. Having identified you as a leader in the [insert candidate's field], the Committee is grateful for your willingness to provide a candid evaluation of Dr. 's \_\_\_\_\_'s professional accomplishments based on an analysis of his/her curriculum vitae and a representative sampling of his/her work." Below the message field is a "Preview" button.

3. 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”.



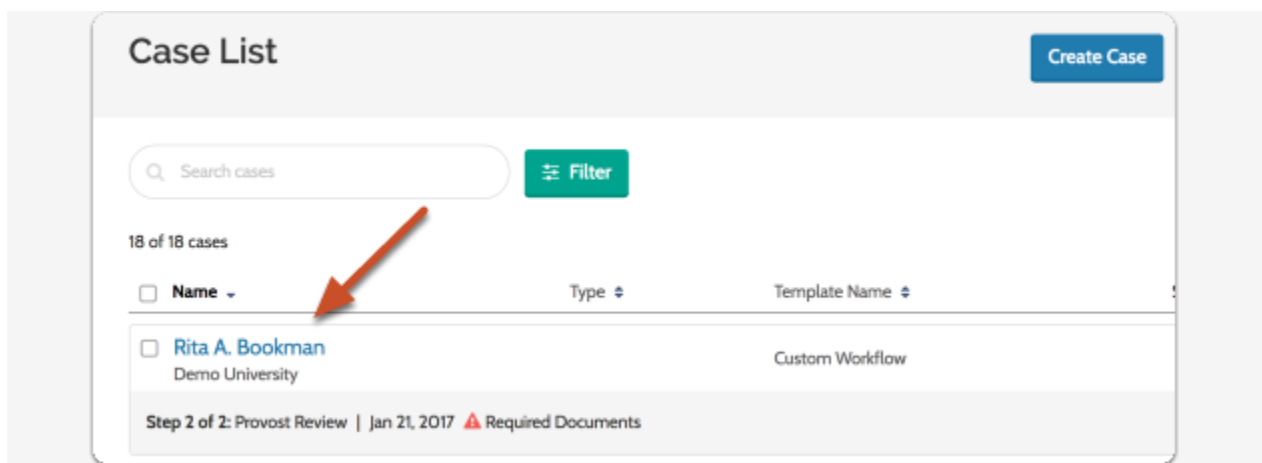
4. The screen will go back to the dossier of the faculty you are reviewing and you will see a confirmation message that you sent the external reviewer email successfully in the bottom left corner of the screen.



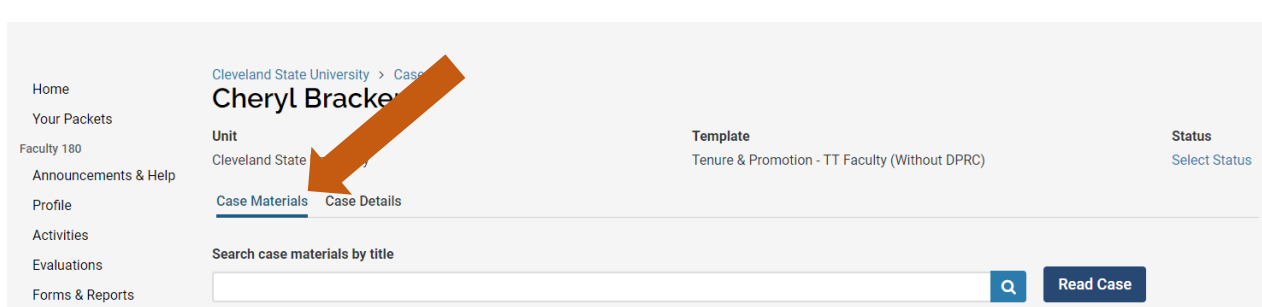
# Uploading External Reviewers CV/Statement of Qualification and the Statement of Process used to select/recruit external reviewers

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).

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



## 1. Open the "Case Materials" tab





## 2. 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”

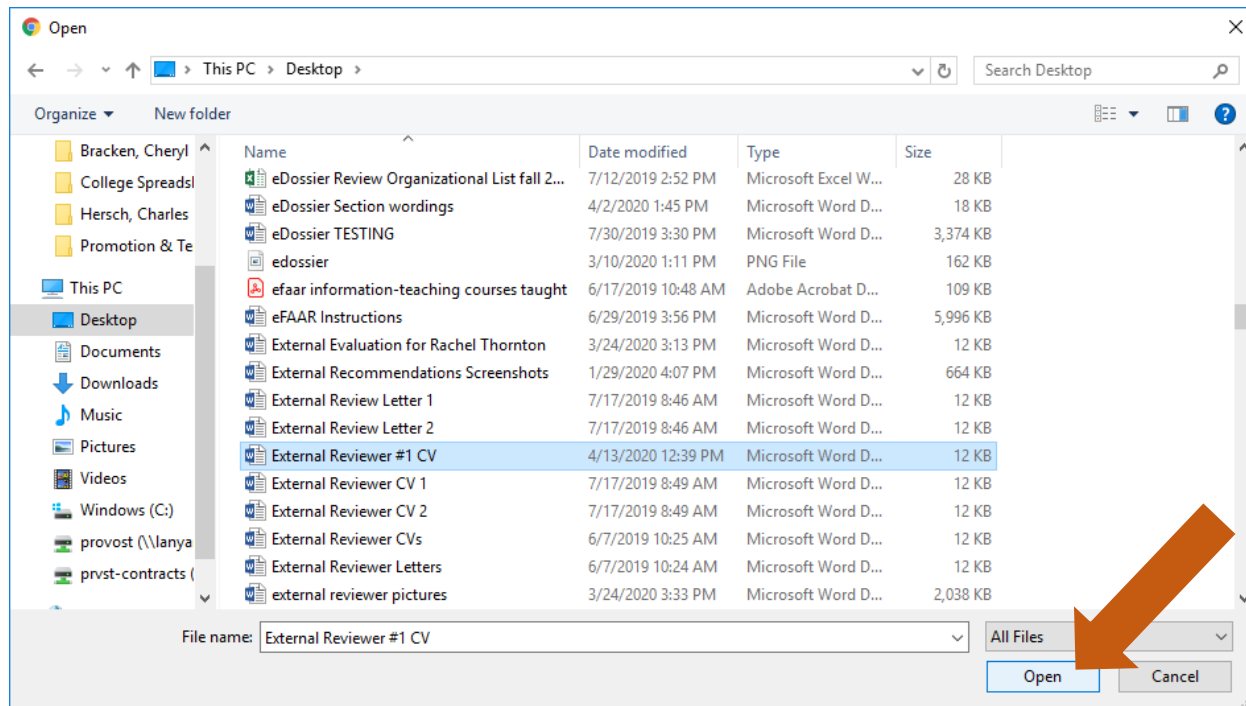
The screenshot shows a web interface for managing a case. On the left is a navigation menu with categories like 'Your Packets', 'Announcements & Help', 'Cases', and 'Users & Groups'. The main area is titled 'Internal Sections' and contains a list of sections. Each section has an 'Add File' button. An orange arrow points to the 'Add File' button for the 'External Reviewer CV/Statement of Qualifications' section.

- Internal Review Letters (Edit, Add File)
- Materials (No files have been added to this section.)
- Reviewer Inserted Material, if applicable (Edit, Add File)
- External Reviewer CV/Statement of Qualifications (Edit, Add File)
- Statement of Process used to select/recruit external reviewers (Edit, Add File)
- External Evaluations (Request Evaluation, Add File)

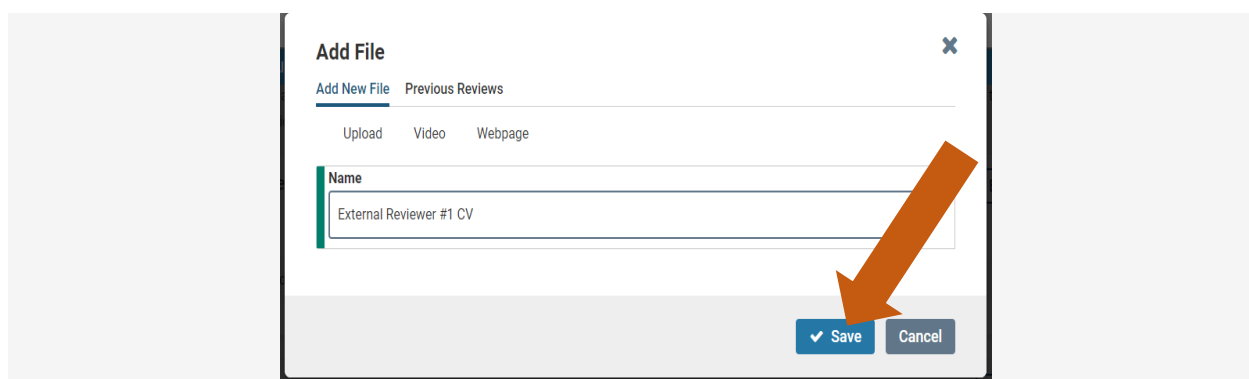
## 3. Browse to upload a new file

The screenshot shows a dialog box titled 'Add Review Summary'. It has two tabs: 'Upload a new file' and 'Select file from case'. Below the tabs is a large area with a cloud icon and an upward arrow, with the text 'Drag & Drop your files anywhere or'. Below this is a 'Browse To Upload' button, which is highlighted by a large orange arrow. At the bottom right are 'Add' and 'Cancel' buttons.

#### 4. Choose the file you wish to upload and select “Open”



#### 5. Select “Save”



Now the document has been added to the selected section

Administration ▾

Promotion & Tenure

Cases

Templates

Administration

Reports

Users & Groups

> Reviewer Inserted Material, if applicable Edit Add File

External Reviewer CV/Statement of Qualifications Edit Add File

Materials

Title	Details	Actions
<input type="checkbox"/> External Reviewer #1 CV	Added by Rachel Thornton Apr 13, 2020	<a href="#">Edit</a>

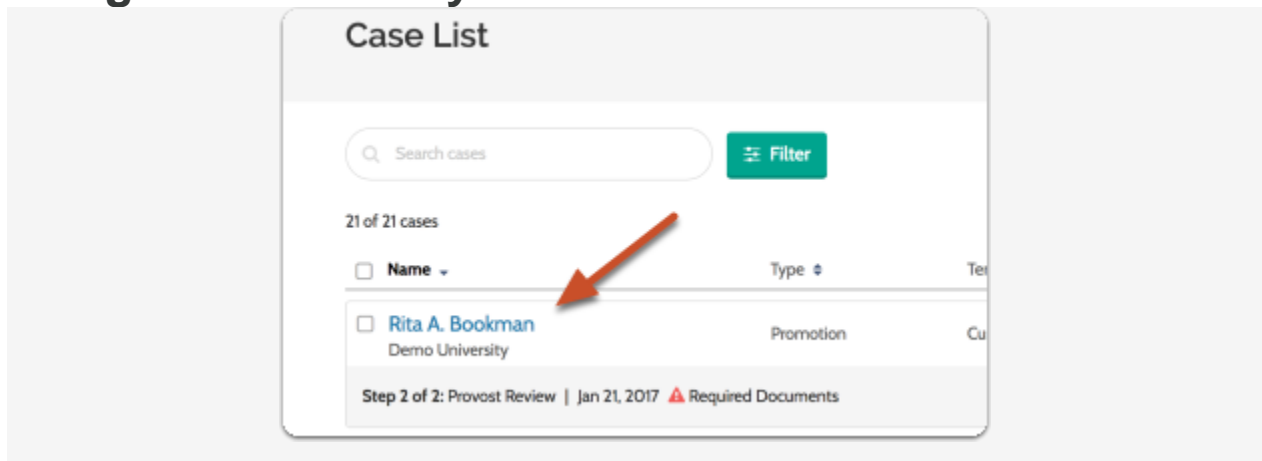
You can continue adding as many files as you wish by repeating the steps (1-5).

**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).**

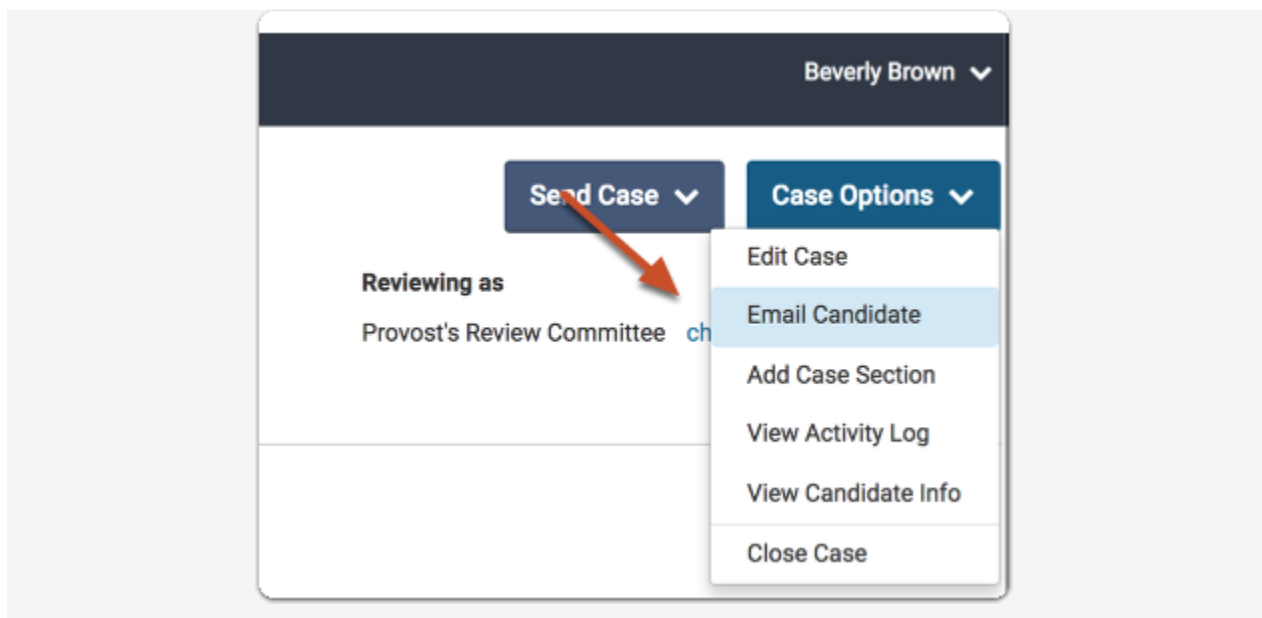
# Share the Review Letter with Candidate

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).

## 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.

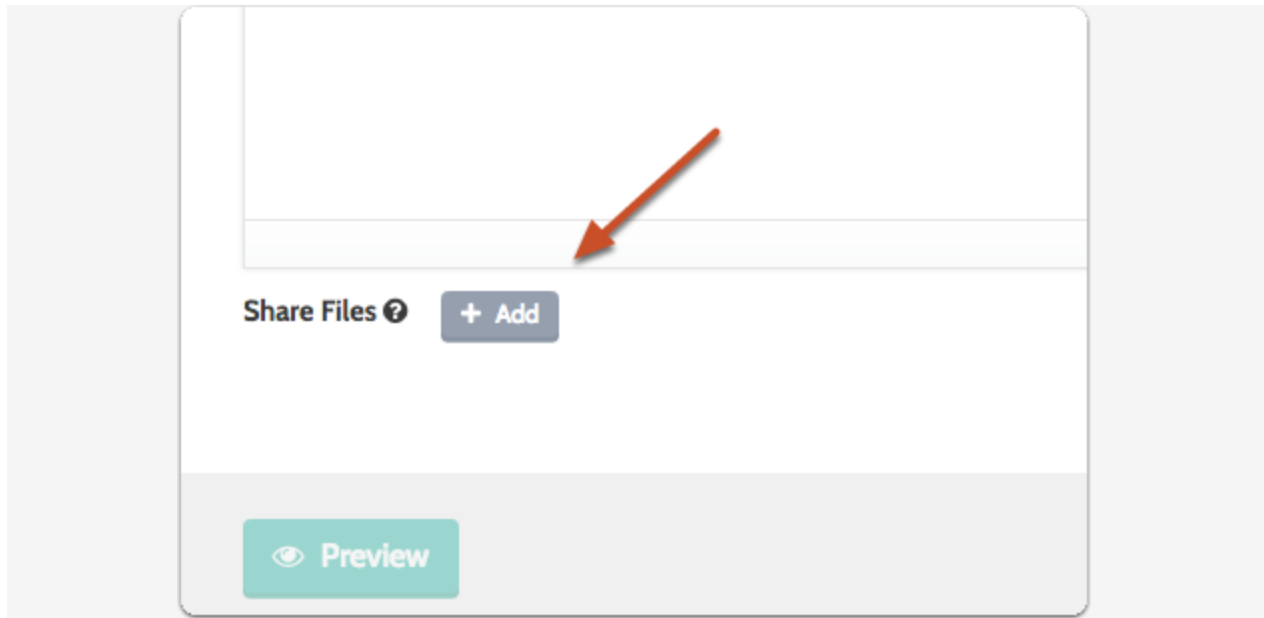
The screenshot shows a web form titled "Message to Candidate" with a close button (X) in the top right corner. The form contains the following elements:

- To:** Bob Pnt (miserybrothers@gmail.com)
- Subject:** A text input field containing "Message Subject".
- Message:** A rich text editor with a toolbar containing icons for undo, redo, bold, italic, strikethrough, link, unlink, bulleted list, numbered list, indent, and outdent. Below the toolbar is a large text area.
- Share Files:** A section with a "Share Files" label and a "+ Add" button.
- Details Panel:** A grey box on the right side of the form. It contains:
  - Direct email reply:** blothar.brown@interfolio.com
  - File Response:**  Enable ⓘ
- Buttons:** At the bottom of the form, there are three buttons: "Preview" (teal), "Send" (blue), and "Cancel" (grey).

Two red arrows are present: one points from the "Details" panel to the "To" field, and another points from the "Preview" button to the "Add" button.

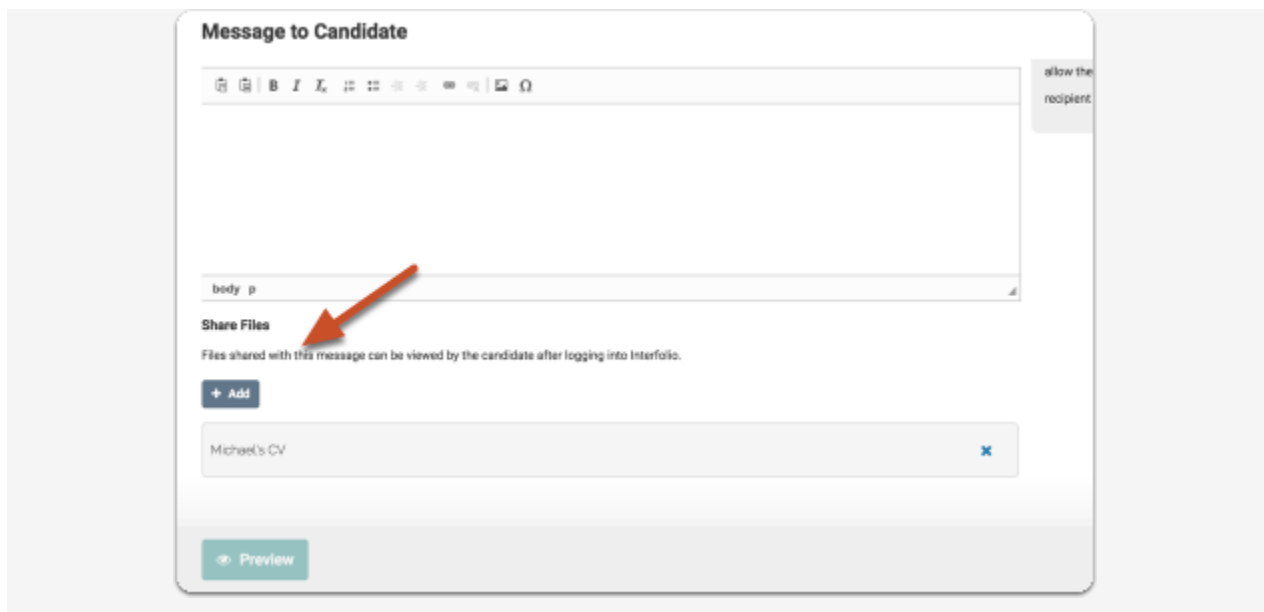
If you need to share files with the candidate:

**Click "Add" at the bottom of the form**



## Select files to share

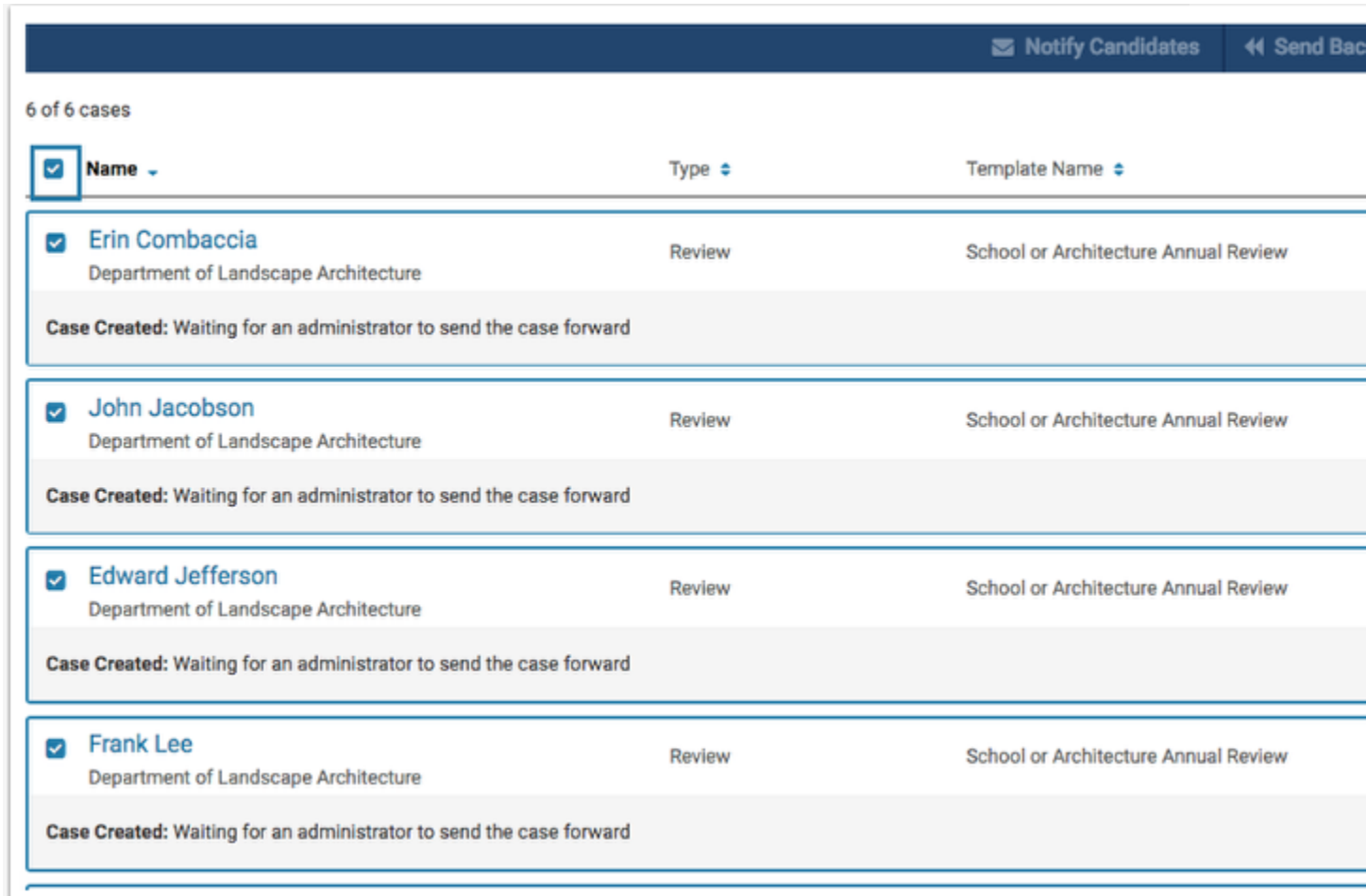
Candidates will receive an email with instructions to sign in and view shared committee files.



# 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.

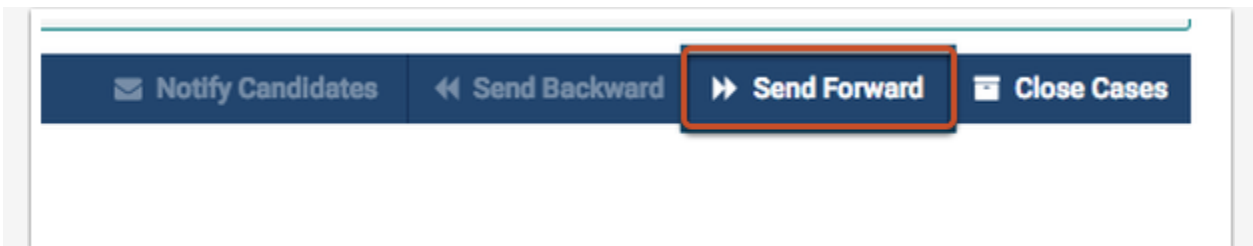
Select the cases/eDossiers you want by putting a check mark next to each one.



The screenshot shows a web interface for managing cases. At the top right, there are two buttons: "Notify Candidates" (with an envelope icon) and "Send Backward" (with a left arrow icon). Below this, it says "6 of 6 cases". The main area is a table with columns for "Name", "Type", and "Template Name". Each row represents a case, with a checkmark in the "Name" column. Below each case name, there is a status message: "Case Created: Waiting for an administrator to send the case forward".

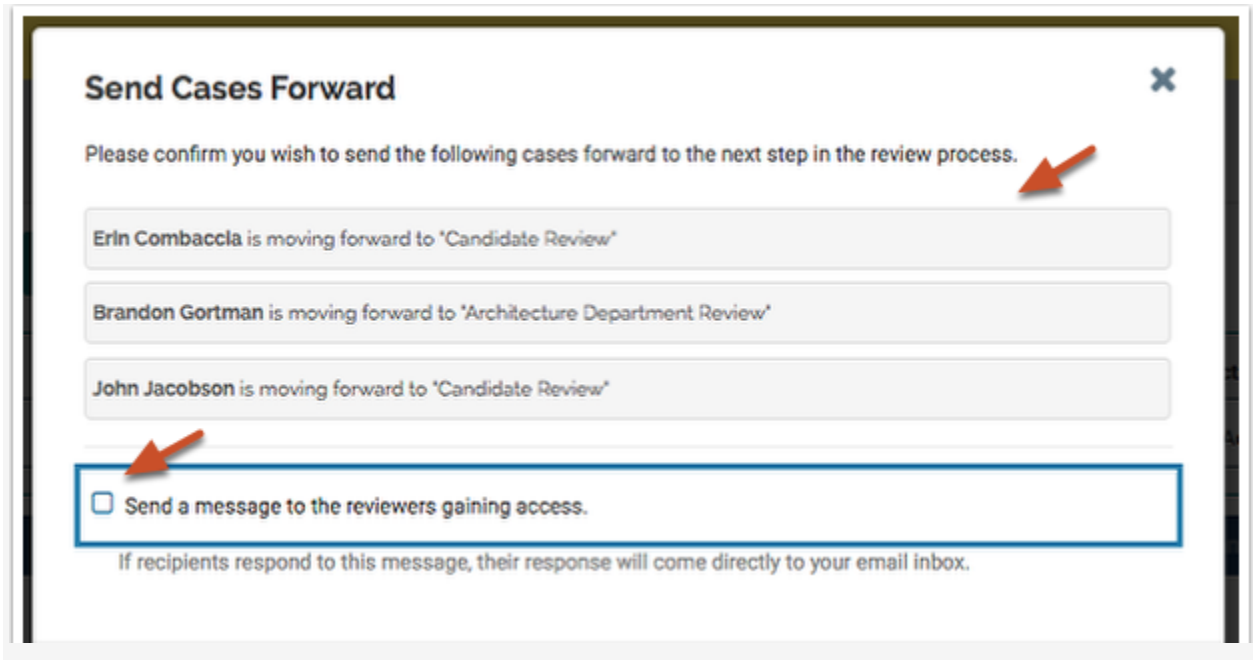
<input checked="" type="checkbox"/> Name	Type	Template Name
<input checked="" type="checkbox"/> Erin Combaccia Department of Landscape Architecture	Review	School or Architecture Annual Review
<input checked="" type="checkbox"/> John Jacobson Department of Landscape Architecture	Review	School or Architecture Annual Review
<input checked="" type="checkbox"/> Edward Jefferson Department of Landscape Architecture	Review	School or Architecture Annual Review
<input checked="" type="checkbox"/> Frank Lee Department of Landscape Architecture	Review	School or Architecture Annual Review

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

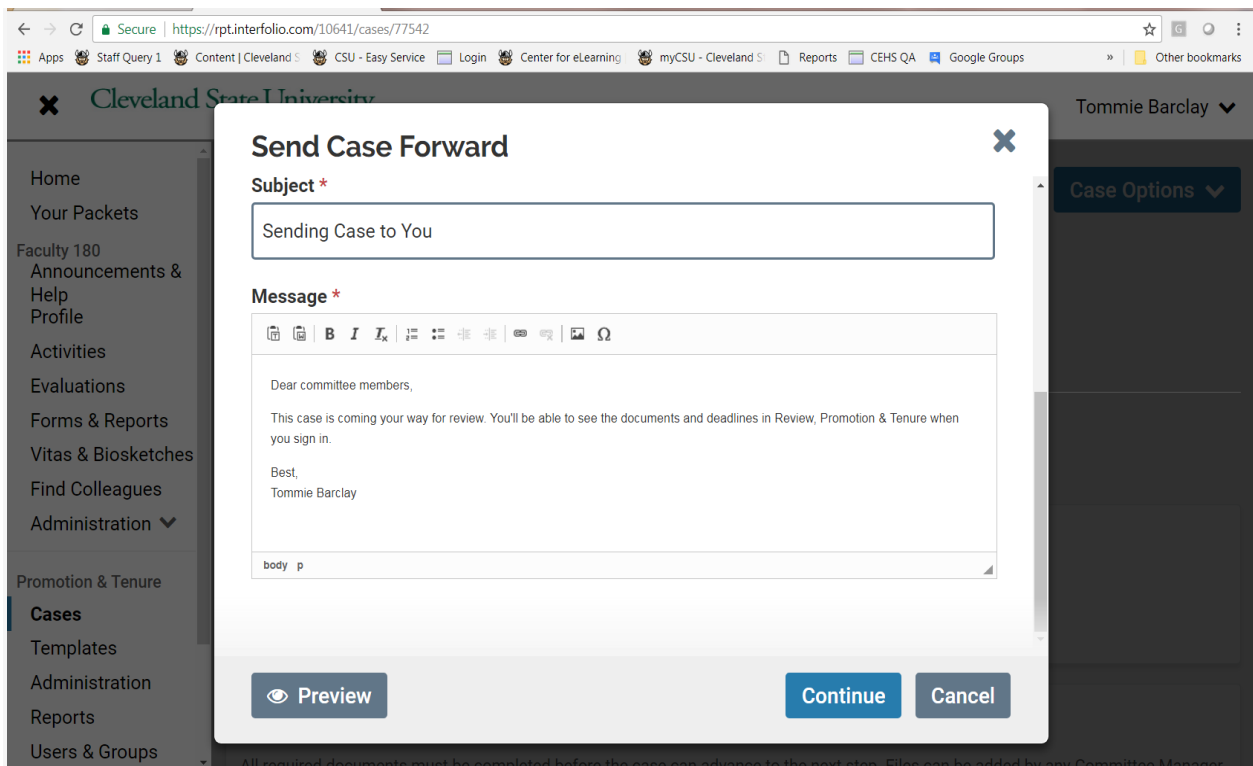


This image is a close-up of the blue ribbon navigation bar. It contains four buttons: "Notify Candidates" (with an envelope icon), "Send Backward" (with a left arrow icon), "Send Forward" (with a right arrow icon), and "Close Cases" (with a document icon). The "Send Forward" button is highlighted with a red rectangular border.

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.



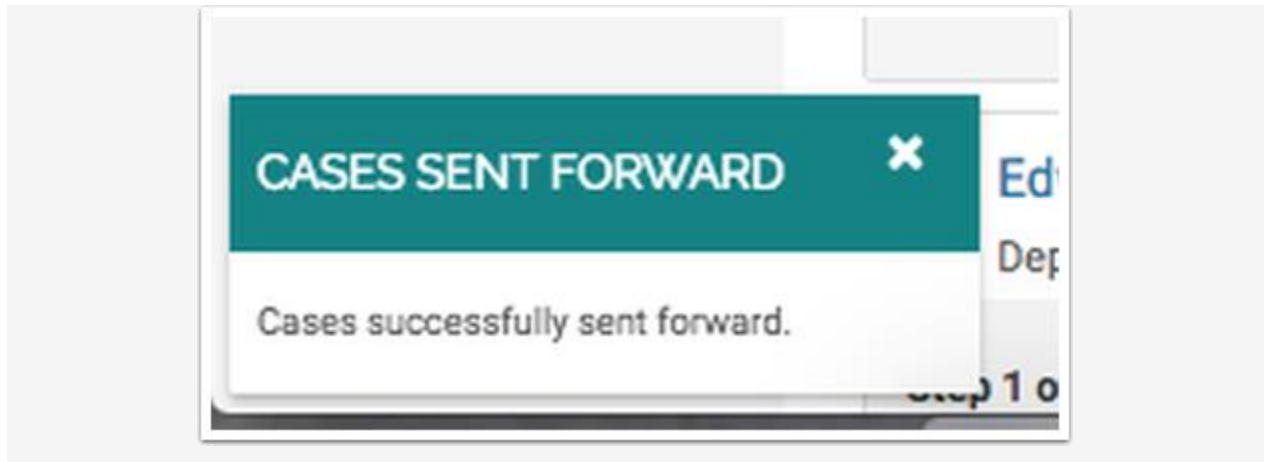
You can either personalize a message sent to the reviewers gaining access or use the default message that appears. When done you can either preview your message and/or send it.





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.



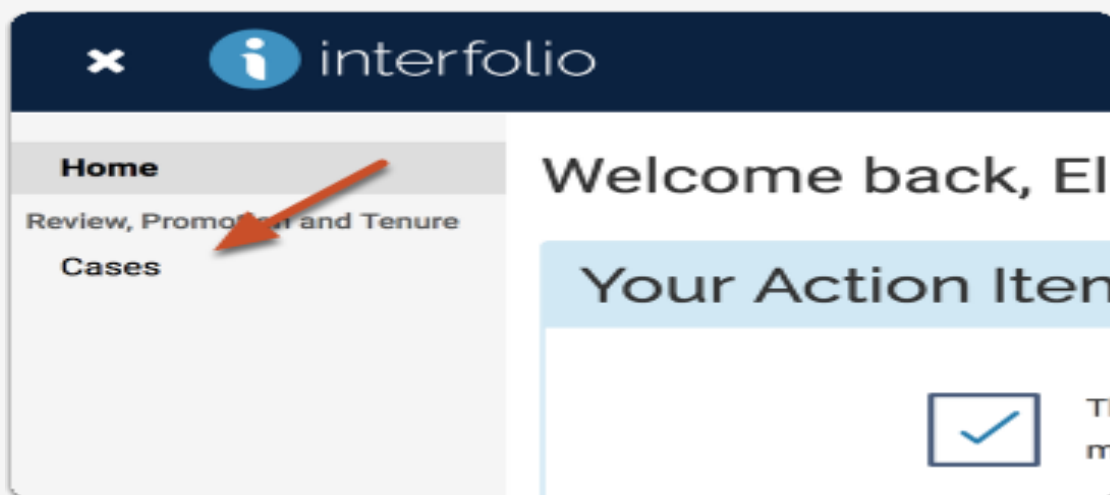
Once the case/eDossier has been sent forward you will lose access to edit the review letter or other uploaded supplementary materials.

# 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.

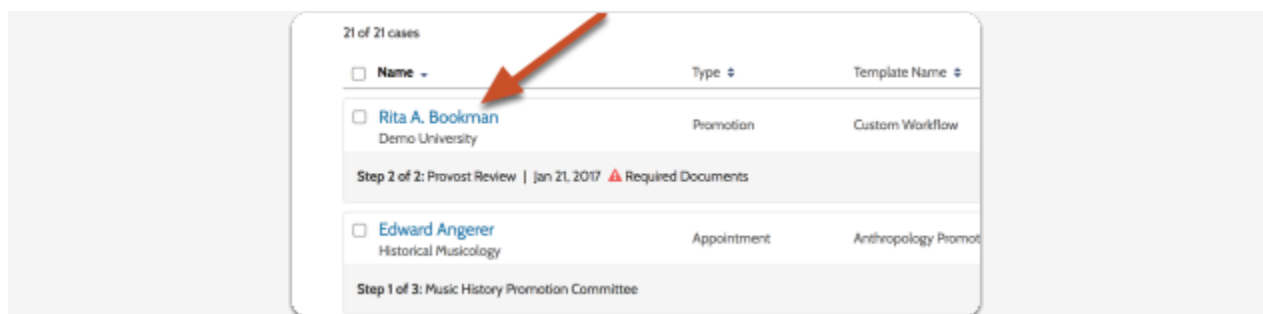
Once logged into your Faculty180 Account,

Select "Cases" under Review, Promotion & Tenure on the left hand navigation bar



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

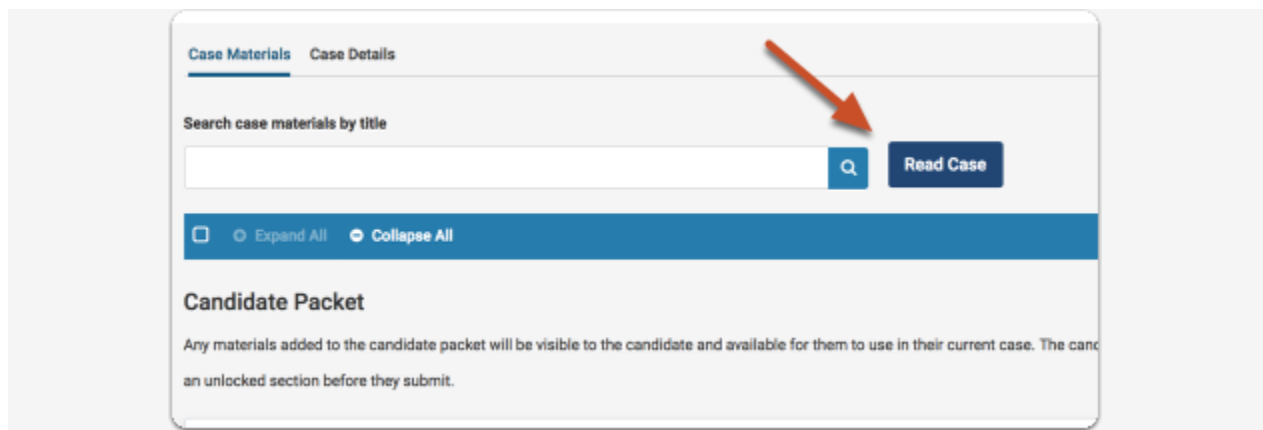
Click the name of the candidate to view case materials



### 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



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.

The screenshot shows a web browser window with the URL <https://rpt.interfolio.com/10641/cases/77698/read>. The page title is "Rachel Thornton". The interface is divided into a sidebar and a main content area. The sidebar has a "Packet" tab selected, showing a list of materials:

- > EXTERNAL REVIEWS (highlighted with an orange arrow)
- > INTERNAL REVIEW LETTERS
- > 1 INTRODUCTORY MATERIALS - A. CURRENT CV
- > 1 INTRODUCTORY MATERIALS - B. SIGNED COPY OF APPOINTMENT LETTER OF INTENT (LOI) (FOR ALL BUT FULL PROFESSOR CANDIDATES)
- > 1 INTRODUCTORY MATERIALS - C. TENURE/PROMOTION/REAPPOINTMENT GUIDELINES OF DEPARTMENT/SCHOOL OR COLLEGE
- > 1 INTRODUCTORY MATERIALS - D. OTHER
- > 2 PERSONAL SUMMARY STATEMENT
- > 3 TEACHING REPORT - A. TEACHING STATEMENT
- > 3 TEACHING REPORT - B. PEER OBSERVATION REPORTS
- > 3 TEACHING REPORT - C. STUDENT EVALUATIONS (TABLE WITH BLUE/SEIQ SCORES)
- > 3 TEACHING REPORT - D. SYLLABI
- > 4 RESEARCH/SCHOLARSHIP/CREATIVE ACTIVITY REPORT - A. RESEARCH/SCHOLARSHIP/CREATIVE ACTIVITY STATEMENT

The main content area displays "External Reviewer Letter #1". At the bottom of the page, there are navigation controls: "Previous Material", "1 / 5", and "Next Material".

# Need Help? - Important Contact Information

## School of Nursing

Corinne Wheeler - (216) 687.5048 or [c.a.wheeler@csuohio.edu](mailto:c.a.wheeler@csuohio.edu)

Joan Thoman - (216) 687.3518 or [J.THOMAN@csuohio.edu](mailto:J.THOMAN@csuohio.edu)

## College of Education & Human Services

Claire Grantier - (216) 687.4619 or [c.grantier@csuohio.edu](mailto:c.grantier@csuohio.edu)

## Monte Ahuja College of Business

Melinda Arnold - (216) 687.6952 or [M.J.ARNOLD@csuohio.edu](mailto:M.J.ARNOLD@csuohio.edu)

## Washkewicz College of Engineering

George Chatzimavroudis - (216) 687.6899 or [G.CHATZIMAVROUDIS@csuohio.edu](mailto:G.CHATZIMAVROUDIS@csuohio.edu)

## College of Sciences & Health Professions

Kathleen McNamara - (216) 875.9831 or [K.MCNAMARA@csuohio.edu](mailto:K.MCNAMARA@csuohio.edu)

## College of Liberal Arts & Social Sciences

Wendy Regoeczi - (216)687.9349 or [W.REGOECZI@csuohio.edu](mailto:W.REGOECZI@csuohio.edu)

Jody Milkie - (216)687-3663 or [J.MILKIE@csuohio.edu](mailto:J.MILKIE@csuohio.edu)

## Maxine Goodman Levin College of Urban Affairs

Wendy Kellogg- (216)687.5265 or [W.KELLOGG@csuohio.edu](mailto:W.KELLOGG@csuohio.edu)

## **Office of the Provost**

Rachel Moore- (216) 687.3577 or [r.e.thornton82@csuohio.edu](mailto:r.e.thornton82@csuohio.edu)

## **Center for Faculty Excellence**

Joanne Goodell- (216) 687.5509 or [J.GODELL@csuohio.edu](mailto:J.GODELL@csuohio.edu)