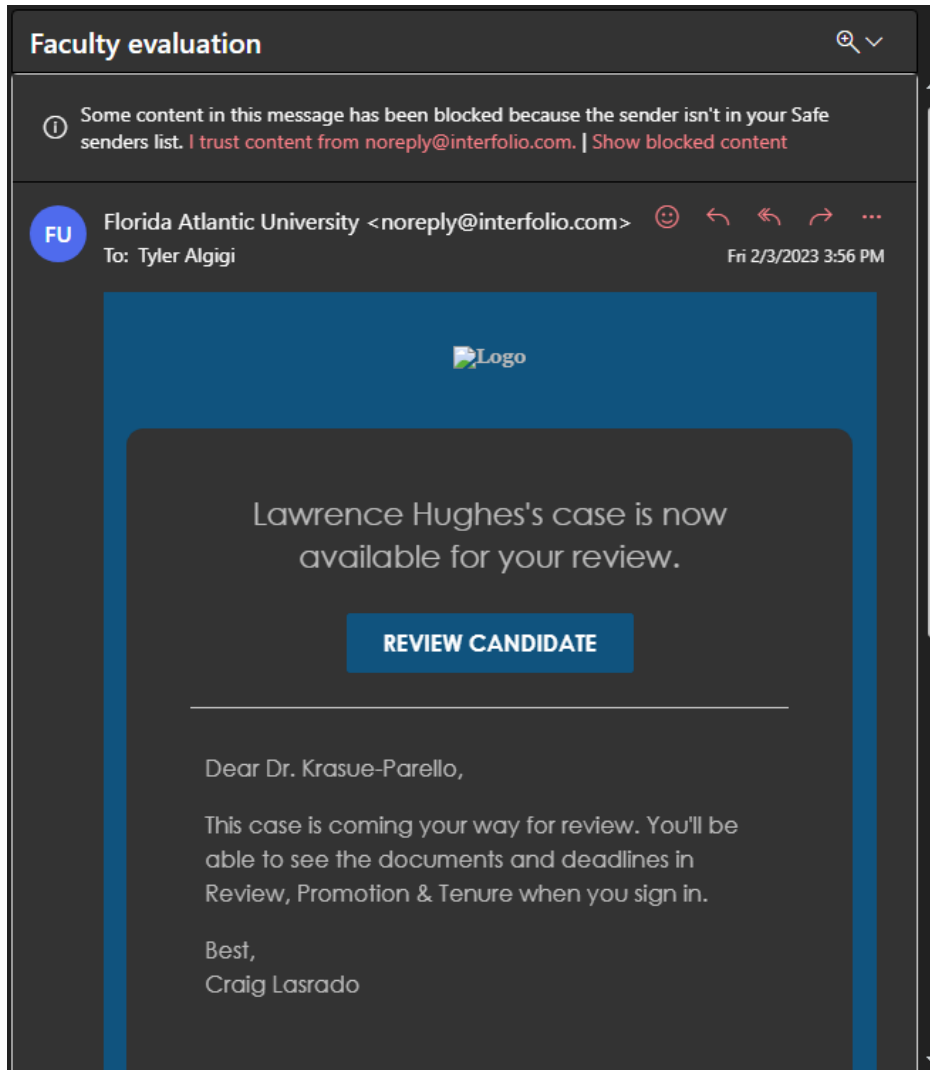# Interfolio Evaluators instructions

1. When a case is ready for review, you will receive an email from noreply@interfolio.com like the one below.

2. Click on the 'Review Candidate' button which will sign in to Interfolio.

3. You will be brought to the candidate packet where you can view all the documents uploaded by the candidate and view the forms they have filled out.

4. If you click on the Read Case button it will show a quick overview of all the documents involved in the case.

5. You can view all the forms they have filled out under Candidate Documents.
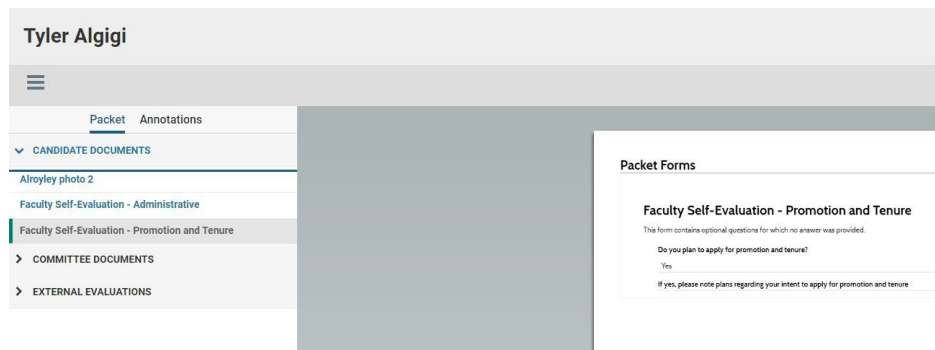
6. Documents can also be downloaded by clicking on the download button on the top right.

7. Click on 'Return to Case' to go back to the case.

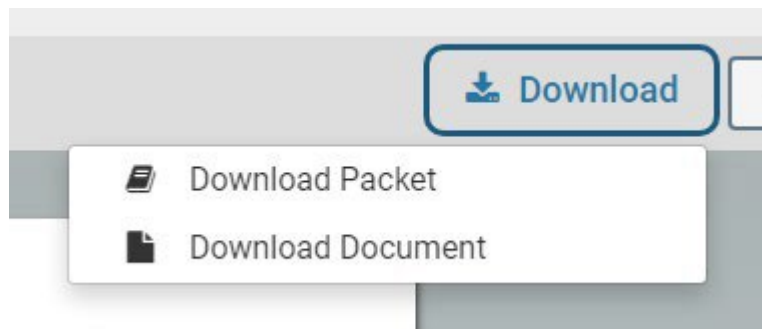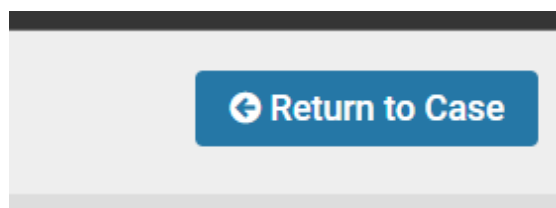8. Scroll down to Internal Sections and click on View

9. Click on fill out form/Edit Submission under required items.

10. Fill out the required questions and then click on submit form.

11. You will see this dialog box, click 'Yes'.

Confirm ✖

Submitting the form "Faculty evaluation" will make your responses available to the appropriate members for review. You will be able to change or edit your responses while the case is at the current step.

<div align="right">
<kbd>Yes</kbd> <kbd>No</kbd>
</div>

12. If you are Step 1 in the case review steps, you will see a 'Send Case' button click on that and forward the case to next step. If you see 'Case Options' go to close case section below.

Send Case ⌄

Forward to
Associate Dean

~~Select Status~~
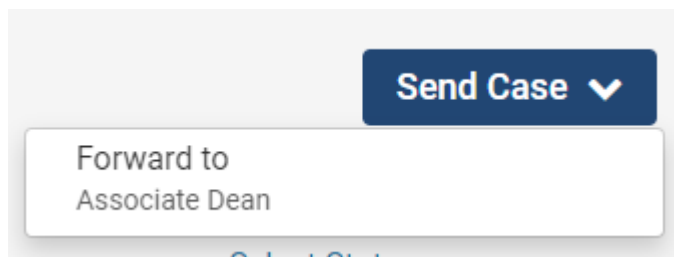
13. Fill out the email and click continue.

Send Case Forward ✖

Great job! You're sending the case forward to the next step, Associate Dean. The following reviewers will lose access to the case:

Tyler Algigi | 1 members

The following reviewers will gain access to the case:

Craig Lasrado | 1 members

☑ Send a message to the reviewers gaining access.

If recipients respond to this message, their response will come directly to your email inbox.

Subject *

Message Subject

Message *

B *I* I_x | ≔ ≔ ⇥ ⇤ | ⊕ ⇱ | 🖼 Ω

Dear committee members,

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,
Craig Lasrado

👁 Preview   Continue Cancel

14. You will receive the notification below that the case has been forwarded successfully.
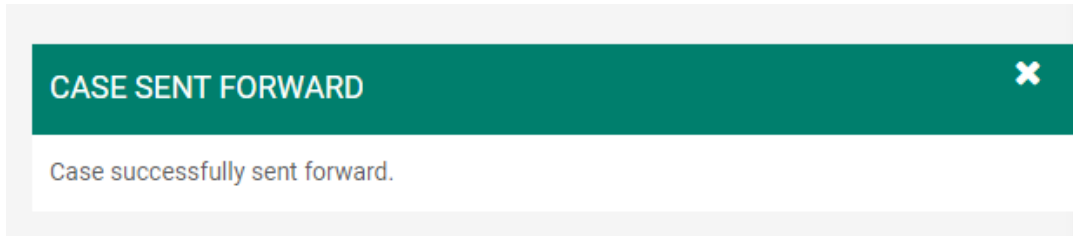
Closing the Case

1. Click on Case Options button and then click on Close Case.
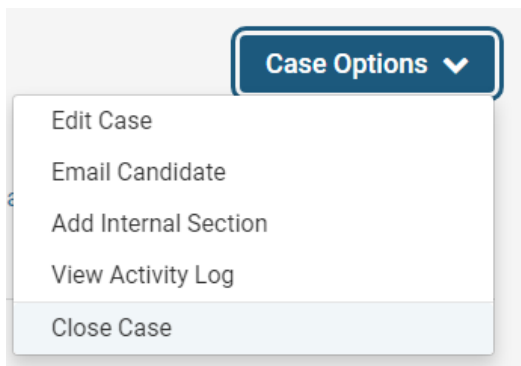
2. Click on the Decision drop-down menu and scroll all the way to the bottom and click on Evaluation completed.
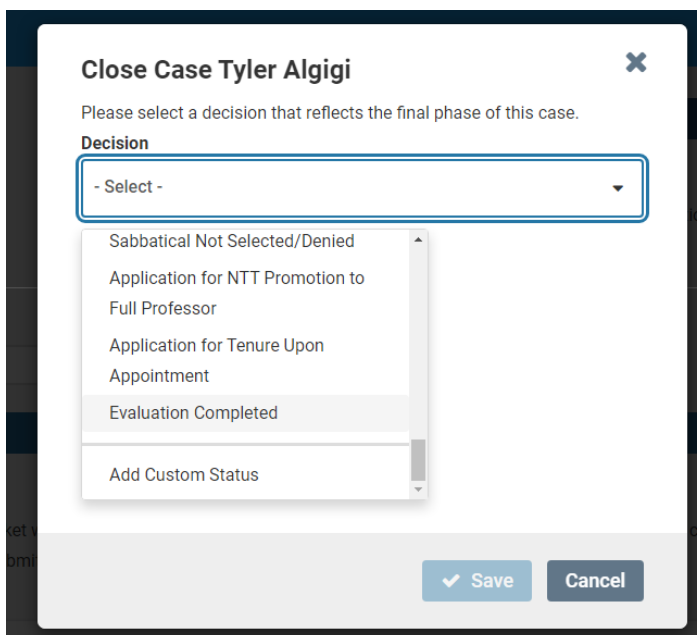
3. Click on Save to close the case.

4. You will receive a notification on the bottom left that the case has been closed.
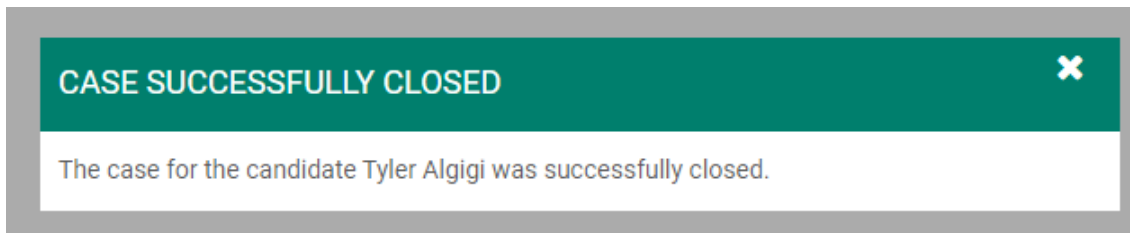
Note: Cases can re-opened if needed by going to Case Options and reopen case.

Since candidates do not automatically get notified that the case has been closed, you can email a direct link to the candidate to view the complete evaluations.

- Under Case details tab scroll all the way down to Internal Section and expand Committee Documents

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.
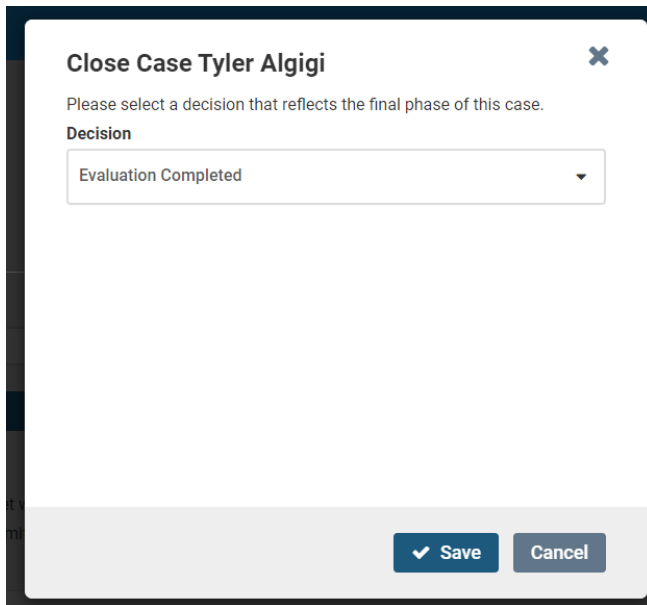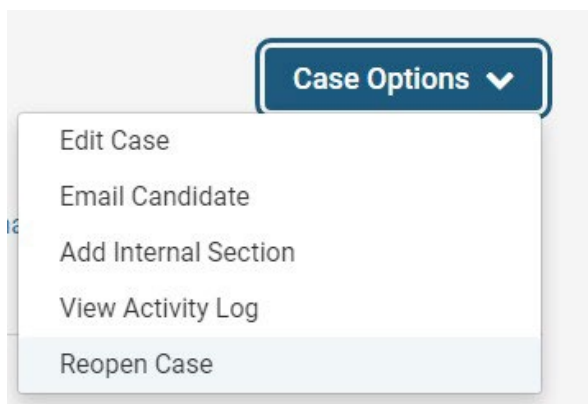
⌄ Committee Documents		Edit Add File

Materials

No files have been added to this section.

Committee Forms

Title	Details	Actions
☐ Faculty evaluation - Scholarship and Research section	Step 1: Tyler Algigi	Last Response Submitted Feb 3, 2023	Edit
☐ Faculty evaluation - Service, Teaching, Admin and Overall evaluation sections	Step 2: Craig Lasrado	Last Response Submitted Mar 20, 2023	Edit

- Check each of the boxes next to the forms.

⌄ Committee Documents		Edit Add File

Materials

No files have been added to this section.

Committee Forms

Title	Details	Actions
☑ Faculty evaluation - Scholarship and Research section	Step 1: Tyler Algigi	Last Response Submitted Feb 3, 2023	Edit
☑ Faculty evaluation - Service, Teaching, Admin and Overall evaluation sections	Step 2: Craig Lasrado	Last Response Submitted Mar 20, 2023	Edit

- On the top right click on Share and then With Candidate.

⬇ **Download**   ✉ **Share**   ⚙

With Candidate

With Committee Members
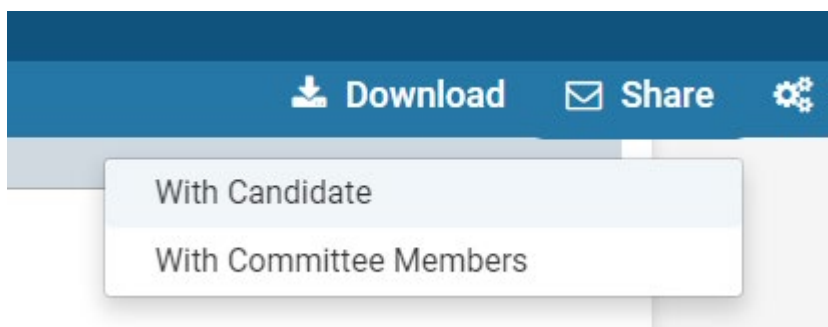
- Fill out the email notification and click send.

Message to Candidate   ✖

To
Lawrence Hughes (lhughes2018@health.fau.edu)

Subject *

Evaluation

Message *

[toolbar: B I Iₓ | ≡ ≡ ≡ ≡ | ∞ | 🖼 Ω]

Hello,

Please see the completed evaluation.

Thank you.

body   p

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

| Faculty evaluation - Scholarship and Research section | ✖ |

| Faculty evaluation - Service, Teaching, Admin and Overall evaluation sections | ✖ |

Details

Direct email reply:
clasrado2015@health.fau.edu

File Response:
☐ Enable
When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

👁 Preview   ✉ Send   Cancel

- You will then get a Message Sent notification on the bottom right.

> **External Evaluations**

MESSAGE SENT   ✖

Your message was successfully sent.