

FHSU Interfolio RPT Candidate Training

Supplemental Notes & Demo Reference

These notes are intended to **supplement the training slide deck**, rather than repeat it. The deck already provides the RPT overview, key terminology, user roles, login information, general workflow, universal practices, and support contacts.

The information below captures the **additional guidance, demonstrations, FHSU-specific practices, and questions discussed during the live training.**

1. Start With the Instructions — Before You Start Uploading

When you open your assigned RPT case, one of your most important first steps is to select **View Instructions**.

Interfolio provides the structure for submitting your materials, but it does **not** determine what should be included in your review file. For those decisions, candidates should refer to:

- The applicable **FHSU/AAUP MOA**, including relevant tenure file and tenure pathway requirements.
- Your **department's criteria**.
- The instructions provided within your individual RPT case.
- Any applicable FHSU schedules or process guidance.

Don't overlook the descriptions inside each packet section

The overall case instructions are not the only direction you need to follow. Individual sections of your packet can have their **own description (from MOA) and required number of files**.

For example, a section may indicate that at least one file is required, while the description provides additional detail about how many documents may or should be included.

Best practice: Before adding materials, review both the overall instructions and each individual section's material descriptions.

2. Build Your Packet for the Reviewer, Not Just for Yourself

A recurring theme during the training was to look at your packet from the perspective of the people who will eventually review it.

FHSU emphasizes **quality over quantity**. A strong packet is complete, thoughtful, and well organized—not simply a packet with the largest possible number of pages or attachments.

Use meaningful document names

Your department may have specific naming conventions. If so, **follow those requirements first**.

Otherwise, choose names that make it immediately clear what a reviewer is opening.

For example:

- CV 2026
- Tenure Statement
- Teaching Evaluations 2025-2026

is much easier for a reviewer to navigate than:

- Document94579
- Final
- Scan3

The name of the file you upload is carried into Interfolio, so it is worth cleaning up file names before adding documents to your packet.

3. Dossier Is Helpful, but You Don't Have to Put Everything There First

During the demo, Dossier was described as a useful **personal working library** for materials you may reuse over time.

However, you do **not** have to upload every document to Dossier before adding it to an RPT packet.

When adding something to a packet section, you can:

- Select a document already stored in Dossier.
- Upload a new file directly from your computer.
- Add a URL when appropriate.
- Pull applicable material from a previous packet.

If a document is something you expect to use again in a future review, maintaining an organized copy in Dossier can save time later.

Important distinction

Uploading a document to **Dossier does not submit it for review.**

It remains in your personal Dossier until you intentionally add it to the appropriate RPT packet.

4. You Can Move and Reorder Documents

This came up as an excellent faculty question during the live session.

After documents are uploaded, you are not necessarily stuck with their original position.

During the demonstration, documents were **dragged and dropped** to:

- Change their order within the packet.
- Move a document if it had been placed in the wrong packet section.

Use Preview Packet to confirm the final order

Rather than relying only on the order in which you uploaded files, open the **packet preview/document reader**.

The order displayed there is the order you should use to evaluate the reviewer experience. If something is not where you want it, adjust it **before submission**.

5. FHSU Best Practice: Do Not Submit Sections as You Build

This is one of the most important clarifications from the live training.

Although Interfolio technically allows packet sections to be submitted individually, **FHSU asks candidates to complete and submit their packet together once it is ready.**

Your work is saved while you build

You may work on your packet over several days or weeks.

You can:

- Add documents.
- Leave the case.
- Return later.
- Continue working.

You do **not** need to submit an individual section simply to preserve your progress. Your work is saved as you build the packet.

Submitting sections individually has caused confusion at FHSU when materials arrive at different times and a section later needs to be edited or unlocked.

Recommended sequence

Build the complete packet → Review the complete packet → Preview the complete packet → Submit all required sections together

Think of **Submit** as the final step, not the Save button.

6. Preview Packet Is Your Final Quality Check

Before selecting Submit, use **Preview Packet**.

This is more than a quick confirmation that files exist. The document reader lets you evaluate the packet as your reviewers will encounter it.

Use this opportunity to check:

- Did I upload the correct version of each document?
- Is every document in the correct section?
- Are documents in the order I intended?
- Do the file names make sense?
- Did everything upload and display correctly?
- Are pages readable and properly oriented?
- Is the packet easy for another person to navigate?

This is also your opportunity to correct problems **before** the packet becomes locked.

7. Once You Submit, the Section Is Locked

After submission, you can no longer edit the documents or forms within that submitted section on your own.

Interfolio provides a confirmation message before submission reminding you that an administrator will need to unlock the section before additional changes can be made.

This is another reason FHSU recommends waiting until the packet is fully reviewed before submitting.

8. What If I Find a Mistake After Submission?

If you realize after submission that something needs to be corrected—for example, you uploaded last year's document instead of this year's—you will need the relevant packet section **unlocked**.

For FHSU, candidates should work with the appropriate **unit chair or committee chair** regarding the unlock request.

Once the section has been unlocked:

1. Open the unlocked packet section.
2. Remove or replace the incorrect document.
3. Add the corrected material.
4. Review the section again.
5. **Submit the section again.**

The last step is critical: RESUBMIT

Uploading the corrected document does **not** automatically replace the version currently available to reviewers.

Your changes may be saved in your packet, but until you select **Submit** again, reviewers will continue to see the previously submitted version.

Unlocked → Correct → Review → Resubmit

9. Finding Documents Shared With You During Review

Your involvement with the case may continue after you submit your packet.

If a committee shares something with you, you may see an indicator associated with the case. When a file has been shared, a **Shared Committee Files** area becomes available within the case.

This is where you can access letters or other documents that reviewers have shared back with you.

10. Save Important Shared Letters to Your Dossier

One particularly useful feature demonstrated during the training was **Copy to Dossier**.

If a letter has been shared with you and it is something you may need during a later review cycle:

1. Open **Shared Committee Files**.
2. Locate the shared document.
3. Select **Copy to Dossier**.

The document is then preserved within your personal Dossier so it can be available as part of your professional materials in the future.

You can also download the document and store it separately if preferred.

This is a useful habit to build as your case moves through its review stages.

11. When a Shared Document Is “Open for Response”

If you see **Open for Response**, it means a document has been shared with you and the reviewer has enabled the ability to respond through Interfolio.

You should first read the shared material and understand what action, if any, you would like to take.

FHSU-specific clarification

During the training, FHSU clarified that this functionality may be used when the committee or chair enables a response to the **final tenure letter**.

Providing that response is **optional**.

FHSU also clarified that appeals associated with the **initial letters are handled outside of Interfolio**, so faculty should not assume that every response or appeal occurs through the RPT response feature.

12. A Few Practical Habits That Will Save You Time

The live demonstration highlighted several habits that are worth remembering even though they are easy to overlook:

Check the packet Overview as you work.

The progress indicators can help you identify sections that are still incomplete.

Do not assume that adding a file means the task is finished.

Check section instructions, required file counts, and the packet preview.

Use Dossier strategically.

It is particularly valuable for materials you expect to reuse—not simply as an extra step for every document.

Take the reviewer perspective.

Clear naming, logical organization, properly prepared PDFs, and thoughtful document ordering make the packet easier to evaluate.

Most importantly: don't rush Submit.

Once submitted, the section locks. Give yourself time for one complete preview first.

Candidate “What Do I Do If...?” Quick Reference

Situation	What to Do
I don't know what belongs in a section.	Review the case/section instructions, applicable MOA, and department criteria. For FHSU requirements, use FHSU resources rather than Interfolio Product Support.
I need to leave before my packet is finished.	Leave and return later. You do not need to submit sections to preserve your progress.
My documents are in the wrong order.	Drag and drop to reorder them, then verify the result using Preview Packet.
I uploaded something into the wrong section.	Move the document to the correct packet section before submission.
I uploaded a document to Dossier. Is it submitted?	No. You still need to add it to your RPT packet and ultimately submit the packet.
I submitted and then found an error.	Contact the appropriate FHSU unit chair or committee chair regarding an unlock. Correct the section and resubmit it .
A committee shared a letter with me.	Look under Shared Committee Files in the case.
I may need that shared letter again later.	Use Copy to Dossier to preserve it for future use.
My case says Open for Response.	Review the shared document. At FHSU, an enabled response may accompany the final tenure letter and is optional. Initial-letter appeals are handled outside Interfolio.

The four live-training takeaways worth remembering

Read the instructions before uploading.

Build the entire packet before submitting.

Trust Preview Packet—not assumptions—to confirm what reviewers will see.

If an unlocked section is corrected, you must resubmit it.