

FHSU Interfolio RPT Committee Member & Committee Manager Training

Supplemental Notes & Demo Reference

These notes are intended to supplement the training slide deck and recording. They focus primarily on the **live demonstration, Fort Hays State-specific workflow guidance, and practical details** committee members and committee managers may need while actively working through a faculty review case.

1. Committee Member vs. Committee Manager: Know Which Actions You Own

Both committee members and committee managers can review cases assigned to their committee, but the **committee manager manages the workflow in addition to reviewing the case.**

At FHSU, committee manager responsibilities may include:

- Uploading required recommendation letters
- Sharing letters with the candidate
- Sharing appropriate letters with prior review levels
- Unlocking candidate packet sections when revisions are permitted
- Sharing the final recommendation letter and enabling the appropriate candidate response
- Verifying the case is complete
- Moving the case to the next review step

Committee managers may be department chairs, committee chairs, deans, or, in some cases, administrative assistants.

Easy way to remember it:

Committee members review. Committee managers review and manage the workflow.

2. If You Cannot See a Case, It May Not Have Reached Your Committee Yet

Cases become available to reviewers **progressively as they move through the workflow.**

If you know you are supposed to review a faculty member but do not see the case, first ask:

Has the case reached my committee's workflow step yet?

Your committee gains access when the case reaches the step assigned to your committee. Once the case moves beyond your step, you may lose access.

If you believe the case should already be at your step but it still does not appear, contact the appropriate FHSU administrator.

3. Case Details vs. Case Materials

You will move frequently between **Case Details** and **Case Materials**.

A useful way to remember the difference from the training:

Case Details = What do I need to do?

This is your workflow roadmap.

FHSU has built instructions directly into the case, including the actions the committee manager is expected to complete. For the demonstrated tenure workflow, those included:

1. Review the candidate's materials.
2. Upload the initial recommendation letter.
3. Share the initial letter with the candidate.
4. Unlock an appropriate packet section if an allowable correction is needed.
5. Upload the final recommendation letter.
6. Share the final letter with the candidate and enable the appropriate response.
7. Move the case forward when the review step is complete.

Step-by-step FHSU guides may also be linked directly from this area.

Case Materials = What do I need to review?

This is where you will find:

- The candidate's submitted packet materials
- Documents such as CVs, statements, teaching materials, scholarship, service documentation, etc.
- Internal sections containing documents created during the review process, including recommendation letters

When in doubt about your next step, return to Case Details and reread the FHSU instructions.

4. Reviewing the Candidate Packet

Opening a candidate document launches the Interfolio document reader.

You can navigate the candidate's packet directly from the reader without repeatedly opening and closing individual files. You can:

- Move through documents and pages
- Zoom in and out
- Navigate among packet materials
- Use annotations while reviewing

FHSU-specific note: Downloading is disabled

Candidate materials are reviewed directly within the secure Interfolio reader rather than downloaded.

Your annotations are private

Annotations can be used to highlight material or record thoughts while reviewing a packet.

Annotations are private to you. Other reviewers and the candidate cannot see your annotations.

5. Helpful Tip for Reviewing Materials Side by Side

Because downloading is disabled, FHSU shared a helpful workaround when you want to compare materials side by side.

You can open Interfolio in **two browser windows** and open different materials from the same candidate case in each window.

For example:

- Candidate statement in one window

- Supporting packet materials in the second window

An incognito/private browser window can also be useful when working with multiple Interfolio windows.

6. Required Items: Upload Them In Case Details

This is an important workflow distinction.

If FHSU has configured a recommendation letter as a **Required Item**, complete that requirement in **Case Details**.

Do **not** simply navigate to the internal section and upload the document there.

Although the document could technically be placed into the case that way, Interfolio would not recognize the configured **Required Item** as completed.

Rule of thumb

If the requirement appears in Case Details, complete it in Case Details.

Once it has been uploaded properly, the required item will show as complete.

7. Selecting the Correct Internal Section for Recommendation Letters

When uploading a required recommendation letter, you will also select the internal section where the document should live.

The training demonstrated that, typically:

- **Chair and Department Committee Review Documents** is used for department/chair-level materials.
- **Dean and College Documents** is used for dean or college-level letters.

Always follow the detailed FHSU instructions provided within the workflow for the specific letter and review level you are working with.

8. Uploading a Letter Does NOT Share It With the Candidate

This is one of the most important distinctions from the training.

After you upload a recommendation letter, the required item may show as complete—but **the candidate still cannot see the letter automatically.**

Uploading and sharing are two separate actions.

After uploading the letter:

1. Navigate to **Case Materials**.
2. Scroll to the appropriate **Internal Section**.
3. Locate the recommendation letter.
4. Select the checkbox beside the specific file.
5. Choose **Share with Candidate**.

9. “Checkbox First, Share Second”

This was intentionally emphasized during the training because FHSU identified it as one of the most common reviewer errors.

Before selecting “Share with Candidate”:

Check the box beside the actual letter you intend to share.

Then choose **Share with Candidate**.

Before sending the communication, look at the attachment area and verify that the correct letter is actually attached.

What happens if you forget the checkbox?

You may successfully send the candidate an email or message telling them that a letter was shared—but **the actual letter will not be available to them.**

In other words:

Message sent ≠ Letter shared

FHSU specifically noted that forgetting to select the file has historically created additional administrative work because the candidate receives the communication but cannot access the intended letter.

Remember:

Checkbox first → Share second → Confirm attachment → Send

10. Sharing the Initial Recommendation Letter With the Candidate

For the **initial recommendation letter**:

1. Upload the letter through the Required Item in **Case Details**.
2. Select the appropriate internal section.
3. Go to **Case Materials**.
4. Locate the letter in the internal section.
5. Check the box beside the letter.
6. Select **Share with Candidate**.
7. Add the appropriate subject and communication.
8. Follow FHSU guidance directing the candidate to the applicable appeal instructions.
9. Verify that the correct letter is attached.
10. Preview and send.

Do NOT enable a file response for the initial letter

FHSU clarified that responses or appeal-related communication following the initial letter are handled **outside of Interfolio**.

The **Enable File Response** functionality is reserved for the appropriate optional response after the **final letter**.

11. Sharing a Letter Back to Prior Reviewers

FHSU may also require a letter from a later review level to be shared back with an earlier review level—for example, with a department chair, department committee chair, college committee chair, or another appropriate prior reviewer.

This is different from sharing with the candidate.

To share with a prior reviewer:

1. Locate the specific letter in the internal section.
2. Check the box beside the letter.
3. Select **Share with Committee Members**.
4. Review any recipients that automatically populate.
5. Remove current committee members if they are not the intended recipients.
6. Select **Add Another User or Committee**.
7. Search for the appropriate individual or committee.
8. **Click Add** so the person or committee is actually added as a recipient.
9. Add your subject and message.
10. Verify the correct file is attached.
11. Send.

Important

The name **Share with Committee Members** can be misleading in this FHSU use case. You may be using the feature specifically to send a letter **back to a prior review level**, not simply to the committee currently reviewing the case.

Be intentional about the recipient list.

12. Unlocking Candidate Packet Sections

After a candidate submits their packet, the packet sections are locked.

A section does **not** need to be unlocked simply because your committee has begun its review.

At FHSU, the committee manager may unlock a section when the permitted department/program review process results in a need for the candidate to add or correct material.

Only committee managers can unlock sections

Committee members cannot perform this action.

Only unlock what the candidate needs

If the candidate needs to correct one packet section, unlock **only that section**.

There is no need to reopen the entire packet.

13. FHSU-Specific Rule: Do Not Unlock at the College Level

Janet provided an important FHSU-specific clarification during the Q&A:

Candidates are only permitted to make changes to their case during department review according to the MOA.

Do **not** unlock candidate packet sections at the college review level.

Always follow the applicable FHSU process and MOA requirements before allowing candidate changes.

14. After an Unlock, the Candidate Must Resubmit

Unlocking allows the candidate to return to the applicable packet section and make the requested correction.

However, **editing the section is not enough.**

The candidate must **resubmit the section** after making the change.

Until they resubmit, reviewers do not receive the updated submission. Once the candidate successfully resubmits, the packet section returns to a **locked** state.

What should the committee manager look for?

Before continuing the workflow, verify that the corrected section has returned to **Locked**.

Unlocked = the candidate may still be working.

Locked = the section has been submitted.

15. Uploading the Final Recommendation Letter

The final recommendation letter follows the same basic required-item principle as the initial letter.

If it appears as a Required Item:

1. Return to **Case Details**.
2. Upload the final letter there.
3. Select the appropriate internal section.
4. Confirm that the Required Item now shows as complete.

Remember:

Completing the Required Item does not automatically share the letter with the candidate.

You must still go to **Case Materials** and intentionally share the correct final letter.

16. Sharing the Final Letter and Enabling the Candidate Response

When sharing the **final recommendation letter**, FHSU uses the **Enable File Response** functionality.

Steps demonstrated:

1. Locate the final letter in the appropriate internal section.
2. Check the box beside **only the final letter**.
3. Select **Share with Candidate**.
4. Enter the appropriate communication.
5. Verify the correct final letter is attached.
6. Select **Enable Response**.
7. Enter the response deadline using the date provided in the applicable **FHSU tenure timeline**.
8. Select the appropriate internal section where the candidate's response should be stored.
9. Verify everything.
10. Preview.
11. Send.

Before sending, verify:

- Correct candidate
 - Correct final letter
 - Correct message
 - Response enabled
 - Correct response deadline
 - Correct destination/internal section
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17. The Enabled Response Deadline Is a Hard Deadline

This is an especially important difference between an enabled file response and an unlocked candidate packet section.

The response deadline entered when sharing the final letter is a **hard deadline**.

Once that deadline passes, the candidate can no longer submit through that response request.

You **cannot simply unlock the response later** in the way you can unlock an eligible packet section.

Use the exact date identified in the applicable FHSU tenure timeline.

18. When to Use “Enable File Response”

FHSU clarified this explicitly during the Q&A:

Initial letter

Do not enable the file response.

Any appeal or related initial-letter communication is handled outside Interfolio according to the FHSU process.

Final letter

Enable the file response when the FHSU timeline calls for the optional candidate response to the next level.

19. Before Moving a Case Forward: Do a Final Check

Moving the case forward is a **committee manager's responsibility**.

Before doing so, return to **Case Details**, reread the instructions, and verify that your committee's work is complete.

Final review checklist

Confirm that:

- Candidate review is complete.
- All required items are complete.
- The initial recommendation letter was uploaded correctly.
- The appropriate recommendation letters were actually shared with the candidate.
- Any required sharing with prior review levels was completed.
- Any permitted candidate corrections are complete.
- Every candidate packet section is locked.
- The final recommendation letter was uploaded correctly.
- The final letter was shared with the candidate.
- The appropriate optional response was enabled with the correct FHSU deadline.
- The committee's review step is truly complete.

20. Moving the Case Forward Changes Access

When the committee manager selects **Send Case** and forwards the case to the next review step, Interfolio displays information about the access change.

You can review:

- Who is losing access at the current step
- Who is gaining access at the next step
- The notification going to the incoming reviewers

Stop and verify before confirming

Once you move the case forward, you are handing it to the next review level and may lose your access to the case.

That is why the final check should happen **before** you forward it—not afterward.

21. Helpful Navigation Tip: “Collapse All”

When many packet sections are expanded, reaching the internal sections at the bottom of the case can require a lot of scrolling.

FHSU pointed out the **Collapse All** option at the top of the packet.

Use it to collapse the open sections and quickly reach the internal sections containing recommendation letters and other review materials.

22. Seeing a Candidate Case Before the Deadline Can Be Normal

A reviewer asked why a candidate's case was already visible before the stated submission deadline.

A candidate may simply have **submitted early**.

If the submitted packet appears complete, this is not necessarily a problem.

However, FHSU asks candidates to submit their packet **as a whole rather than section by section**.

If you see what appears to be an incomplete or partially submitted packet, communicate with the candidate to determine whether they intended to submit the complete packet before taking action.

Note about the current packet structure

FHSU also noted that the use of separate packet sections represents a change from the prior approach of viewing the candidate's materials as one whole packet. The sections are intended to make materials easier for reviewers to navigate.

Committee Manager “What Do I Do If...?”

Quick Reference

Situation	What to Do
I cannot see the candidate's case.	Confirm that the case has actually reached your committee's workflow step.
I cannot remember what I need to do next.	Return to Case Details and review the FHSU instructions and linked guides.
I need to upload a required recommendation letter.	Upload it through the Required Item in Case Details , not directly into the internal section.
I uploaded the letter. Can the candidate see it now?	No. Navigate to Case Materials and intentionally share it with the candidate.
I am sharing a letter with the candidate.	Check the file checkbox first , then choose Share with Candidate, and verify the attachment before sending.
I forgot to select the file before sharing.	The candidate may receive the message without the actual letter. Reshare the correct file.
I need to share a letter back to a prior reviewer.	Select the specific file → Share with Committee Members → remove unintended recipients → Add User or Committee → actually click Add → verify file → send.
The candidate needs to correct something.	If permitted at the department-review stage, unlock only the required packet section.
I am at the college level and the candidate needs a change.	Do not unlock. FHSU clarified that candidate changes are only permitted during department review according to the MOA.
I unlocked a section. How do I know the candidate finished?	The candidate must resubmit. Once submitted, the section returns to Locked .
When do I enable a file response?	Only when sharing the final letter and the FHSU timeline provides for the optional candidate response.
Can I reopen an enabled response after the deadline?	No. The configured response deadline is a hard deadline.
I am ready to move the case forward.	First confirm required items, sharing, candidate revisions, final letter, response settings, and that all packet sections are locked.
A candidate's case is visible before the due date.	They may have submitted early. If the packet appears incomplete, communicate with the candidate before assuming the submission was intentional.

Five Live-Training Takeaways Worth Remembering

1. Case Details tells you what to do; Case Materials contains what you review.

- 2. Uploading a recommendation letter does not share it with the candidate.**
- 3. Checkbox first, Share second. Always verify the actual letter is attached.**
- 4. Candidate corrections are limited: unlock only the necessary section, only when permitted during department review, and confirm the candidate resubmits.**
- 5. Before moving the case forward, verify everything. Once the case advances, your committee's access may end.**