



# Interfolio

Reappointment, Promotion, Tenure (RPT)

Departmental User's Guide

for

Krieger School of Arts and Sciences

&

Whiting School of Engineering

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## Introduction

Interfolio Review, Promotion and Tenure (RPT) is an online platform for carrying out formal faculty reviews in a shared governance context, built to help academic institutions ensure that these processes are transparent, equitable, efficient, and well-documented.

Homewood’s use of the solution is to replace all existing processes for appointing and promoting faculty at the rank of Associate Teaching Professor, Teaching Professor, Associate Professor with tenure, and Full Professor with tenure thus, creating a consistent and unified process.

RPT is one module offered by Interfolio. JHU also uses another module called 'Faculty Search.' Users access both tools with the same URL for ease of use.

## Purpose of this Guide

This guide was developed to:

1. Serve as a resource regarding the appointment and promotion process for Homewood faculty
2. Demonstrate how to use RPT
3. Provide information on how to obtain help with the software and the process


This guide provides supplemental information to the existing Homewood Academic Council appointment and promotion procedures documents that can be found on the Council's [website](#).


## Accessing RPT

### Recommended Browsers

To make sure you have the best experience possible, Interfolio recommends Google Chrome (latest version), Mozilla Firefox (latest version), Safari (latest version), and Internet Explorer (10 and above).

### How to Log into RPT

Most users will access the system from an icon found under the Human Resources category (  ) from the myJH portal that will utilize Single Sign-On (SSO).

The icon will look like this: 

Alternatively, this [link](#) will log a user directly into the software, while using SSO.

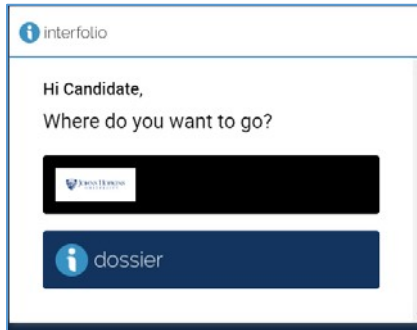
### Interfolio Dossier

Faculty at JHU are provided with an Interfolio Dossier Institutional level account. This is a free online account where faculty can curate their scholarly materials, request and receive confidential letters of recommendation, and store materials for use throughout their career. The Dossier Institution account includes the ability to share materials through [Deliveries](#), in addition to document storage. If a faculty member leaves JHU, their Dossier Institution account will be converted to a free account (no loss of files, but no longer able to share documents via Deliveries for free). If you already have a Dossier account, you may wish to merge it with your JHU Interfolio account. More information about merging accounts can be found [here](#).

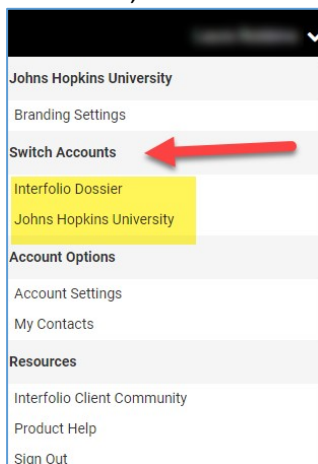
RPT offers a [quick start guide](#) to Dossier on its website as well as information on [managing a Dossier](#).

## Dossier or RPT

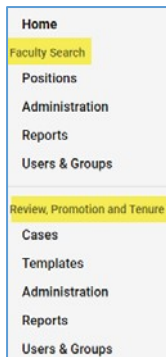
When a user first logs into RPT, they may see the screen below, asking if they want to go to JHU (i.e. RPT) or Dossier:



In addition, the user can switch between the two accounts by switching as indicated below:



If a user also has a Faculty Search account (another Interfolio tool), the screen may look like the following once 'Johns Hopkins University' is selected:



## Departments Need to Request a Case be Created

Department users will contact the Vice Dean for Faculty to request that a case be created for a faculty appointment or promotion. Once the case is created, the candidate will receive an email prompting them to upload their packet. Once their packet has been uploaded, the department will receive an email prompting them to begin work on the case.

## Obtaining Help with RPT

The Academic Council Coordinator ([homewoodac@jhu.edu](mailto:homewoodac@jhu.edu)) is able to assist with questions about Homewood's use of Interfolio's RPT module.

Additionally, there are many help aids available on the [Interfolio website](#) and through JHU myLearning.

Interfolio Scholar Services is available to provide technical support by telephone Monday-Friday, 9am-6pm, EST at (877) 997-8807 or via email ([help@interfolio.com](mailto:help@interfolio.com)).

## Users, Committees and Units

### Users

Faculty are automatically added as users based on their faculty affiliation from JHED.

Departmental administrative staff were initially imported into RPT via a file provided by the Academic Council Coordinator. The association of these staff to applicable units was uploaded by Interfolio's implementation team prior to go live. The data will be maintained by the Academic Council Coordinator.

### Committee Managers

Users can be associated with units and committees. Their responsibilities in the units and committees will vary.

Committee managers are identified as users who will be assisting the candidate with the case in terms of providing documentation. Committee managers have the ability to upload documents, complete committee forms, and can move a case either backward or forward after a committee has finished its review. They can view a candidate's case and download documents.

### User Maintenance for JHED ID Changes

Users in RPT are able to use Single Sign On (SSO) because the JHED ID at the time the account was created is associated with the user in RPT. If a user changes their JHED ID, they'll need to submit a ticket through the [JHU ticketing system](#) to have this information updated in RPT.

## Committees

Committees can be standing or ad hoc. Committees can have members and managers, each with different levels of access to a case as described in Appendix A.

Changes to standing committee membership will affect new cases that are created; existing cases will retain the prior committee membership unless otherwise altered by an administrator.

## Units

Departments are called 'units' in RPT. The Academic Council Coordinator has configured all existing departments that appoint faculty and will continue to maintain this data going forward. Units cannot be deleted while cases are attached to them. For this reason, if a department or division changes its name and has current/prior cases, the new name will replace the prior one in this system. This system does not provide a history of effective dates for these changes at the user level.

## Sample Case Screen Shots

1. When a case has been assigned, you will receive an email with a hyperlink for that case that will automatically open RPT.
2. Once you are reviewing the case in RPT, clicking on 'Case Details' will show you instructions and also provide a list of required documents with a button to add them:



Reviewing as  
Department Appointment Coordinator

Instructions

Instructions to Department/Division Appointment Coordinators

In order to consider an applicant for consideration at the rank of Associate Professor (PAR) or Professor (PAR), the following documents need to be provided. Each item should be uploaded as a separate document and stored in the 'Departmental Documentation' section of the case:

- 1. Transmittal D
- 2. Department Director's Nomination Letter - This letter should contain a statement describing the background of the individual and the anticipated role of the individual in the activities of the Medical Institutions. In addition, the letter must contain a summary of major grant support.
- 3. CV in the JHUSOM format
- 4. PR or EAD card, required if applicant is a non-U.S. citizen

Interfolio Scholar Services is available to provide technical support by telephone Monday-Friday, 9am-6pm, EST at (877) 997-8807 or via email at [help@interfolio.com](mailto:help@interfolio.com).

Required Items

3 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

Nomination Letter

Add

No files have been added to this section.

Transmittal D

Add

No files have been added to this section.

CV

Add

3. Click on 'Case Materials' to add additional (optional) items to the case:

The screenshot shows the 'Case Materials' interface. At the top, there are tabs for 'Case Materials' and 'Case Details' with a notification badge '3'. Below the tabs is a search bar labeled 'Search case materials by title'. A blue bar contains navigation options: 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move'. The main content area is titled 'Candidate Packet' and includes a description: 'Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.' Below this is the 'Internal Sections' section, which states: '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.' A purple warning banner reads: 'You are asked to submit required items as part of this case. View'. The 'Departmental Documentation' section is expanded, showing 'Materials' and a message: 'No files have been added to this section.' To the right of this section are 'Edit' and 'Add File' buttons, with a red arrow pointing to the 'Add File' button.

4. Click on 'Send Case' and select the next step in the workflow once all materials have been added to the case:

The screenshot shows the 'Candidate JHU' interface. At the top, there is a breadcrumb 'Johns Hopkins University > Cases >'. The main title is 'Candidate JHU'. Below the title, there are fields for 'Unit' (Pediatric Urology) and 'Template' (SOM ASTP Application). A 'Send Case' dropdown menu is open, showing options: 'Forward to Department/Division Appointment Coordinator'. A red arrow points to the 'Send Case' button. Below the title bar, there are tabs for 'Case Materials' and 'Case Details'. A search bar labeled 'Search case materials by title' is present. A blue bar contains navigation options: 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move'. The main content area is titled 'Candidate Packet' and includes a description: 'Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.' Below this is the 'Internal Sections' section, which states: '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 'Departmental Documentation' section is expanded, showing 'Materials' and a message: 'No files have been added to this section.' To the right of this section are 'Edit' and 'Add File' buttons.



5. The email message page appears:

**Send Case Forward** [X]

Great job! You're sending the case forward to the next step, Department/Division Appointment Coordinator. The following reviewers will lose access to the case:

Case is Being Created | 0 members

The following reviewers will gain access to the case:

Department Appointment Coordinator | 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 \***

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,

[Redacted]

Preview Continue Cancel

- a. Add a custom message before sending the case forward.

## Workflows

Workflows allow cases to be moved forward and/or backward, as appropriate. Each workflow step can have its own instructions, members, and requirements.

As the case moves forward and/or backward, an email can be generated to the appropriate person(s); this email is free text so the person sending it can convey whatever information the sender deems is essential.

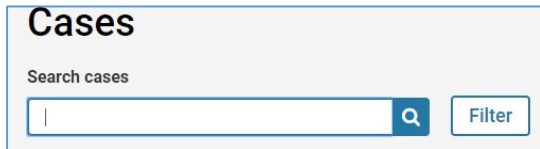
# The Role of a Committee Manager

## Managing a Case

Managing a case may include moving a case forward/backward, and ensuring that all materials have been properly uploaded and completed.

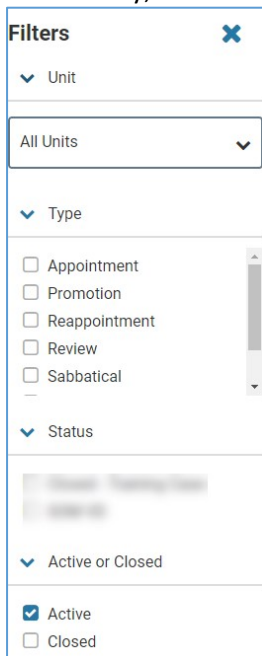
## How to Search for Cases

When a user logs into RPT, they will see, by default, the cases that are assigned to them. However, users can also search for cases by typing any words that appear in the case (name of candidate, workflow name, etc) and clicking on the magnifying glass:



The screenshot shows a search interface titled "Cases". Below the title is a search bar with the placeholder text "Search cases". To the right of the search bar is a magnifying glass icon and a button labeled "Filter".

Additionally, there are filters that can be used to further refine the search:



The screenshot shows a "Filters" sidebar with a close button (X). It contains several filter sections: "Unit" with a dropdown menu set to "All Units"; "Type" with a list of checkboxes for "Appointment", "Promotion", "Reappointment", "Review", and "Sabbatical"; "Status" with a dropdown menu; and "Active or Closed" with checkboxes for "Active" (which is selected) and "Closed".

The status values that appear will only include those in use in existing cases and is not indicative of the total values available for use in the system.

## Helpful Hints

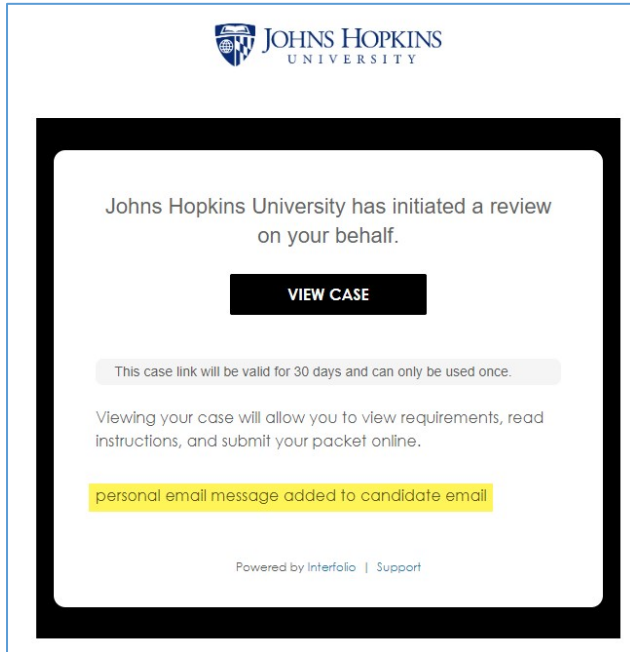
Bookmarks can be utilized to make a long document, such as a CV, more readable to committee members and viewers. Refer to RPT help for more information about [bookmarks](#).

## Screen Shots - Candidate View of a Case

The following screen shots will enable administrators to support faculty with questions about their view of a case.

When an administrator creates a case on behalf of a candidate in RPT, the system will send an email notification that a case has been created. The email will include a hyperlink that will take the candidate to their case within RPT.

The following is a sample email to a candidate. The highlighted text is where a custom message will appear, if provided:



The candidate will be directed to a page that lists the required documents, materials and forms, as well as due dates (if assigned), and instructions for assembling the candidate section of the case.

The candidate should follow the simple on-screen instructions to upload and/or drag and drop documents and complete forms. RPT accommodates many file types, including links to webpages, YouTube and Vimeo videos. The case page is updated as items are added so that it's clear what has been submitted and what still needs to be attached.

RPT provides a page, which shows the completeness percentage of each packet as well as a preview option, which allows the candidate to see how their documents will appear once submitted. When a candidate is ready to submit a completed packet, the candidate should select "Review and Submit" to complete the process. At this point, the case will move forward to the next step in the review process and the candidate will no longer be able to upload or update materials.

RPT offers help to the candidate about the [candidate experience of a RPT case](#).

**Overview - offers candidate what items are required/optional as well as graphic of how close case is to completion:**

Johns Hopkins University > Your Packets >

# SOM PPC Application (Scholarship Track)

[Preview Packet](#)

Unit: School of Medicine      Type: Appointment      Candidate Instructions: [View Instructions](#)

**Overview**    Packet

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward your packet. [To learn more, read the Candidate's Packet Guide.](#)

### Candidate Documents

Submitted Unlocked [Edit](#)

Type	# Required	# Added
<input checked="" type="checkbox"/> CV	0 required	1
<input type="checkbox"/> Citation Report	0 required	2
<input checked="" type="checkbox"/> PR or EAD Card	0 required	0
<input checked="" type="checkbox"/> Recent Reprints	0 required	2
<input checked="" type="checkbox"/> Educational Portfolio	0 required	0
<input checked="" type="checkbox"/> Impact Statement	0 required	0
<input checked="" type="checkbox"/> SOM PPC Nominee Application	12 required	12
<input checked="" type="checkbox"/> SOM PPC Referees	50 required	50
<input checked="" type="checkbox"/> SOM Candidate Demographic Data	3 required	3

**Packet View** - offers candidate an expanded or collapsed view of the case, indicates if documents are unlocked (editable) or locked (not editable), offers a preview of the packet as a whole, and provides a button for candidate to submit case:

Overview    **Packet**

[Expand All](#)    [Collapse All](#)

**Candidate Documents**      [Preview](#)    [Submit](#)    0 of 0 Required Files

Submitted    **Unlocked**

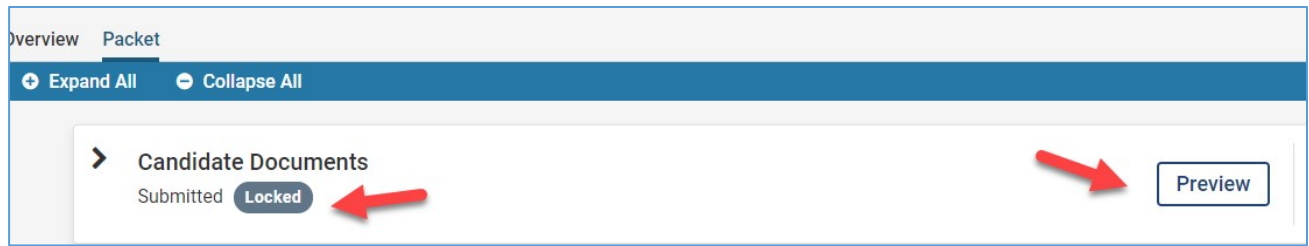
**Message to Candidate when 'Submit' has been clicked:**

**Confirm** ✕

You cannot edit the documents and forms within a section once it has been submitted. An administrator will need to unlock the section in order for you to make any changes. Are you sure you want to submit the section Candidate Documents at this time?

[Yes](#)    [No](#)

**Candidate view once a case has been submitted; the candidate can no longer edit the case but can view the materials:**



Appendix B contains a list of frequently asked question and answers.

## Appendix A Interfolio Dictionary

The following terms are those most used in Interfolio:

Term	Definition
Administrator	People identified to be allowed to initiate cases, create/modify templates and maintain the master data in the application
Bookshelf	A place in a workflow where no processing takes place; a case rests here until an administrator either pushes it forward or backward
Candidate	The person for whom a case is created
Case	Materials for an appointment are entered into an entity called a 'case'; candidates, departments, administrators and committee managers can add content to a case depending upon the template on which the case is based
Committee Manager	Person in charge of a committee; has an elevated level of permissions from committee members; can add files to case; can communicate with the candidate and/or committee members; can move a case forward or backward; permission is established by an administrator
Committee Member	Person who is part of a committee for a specific case; has basic permissions; can read a case; can download a case (if allowed); can leave comments on the case (if allowed)
Template	A pre-defined set of business rules and documents on which a new case is developed; templates for SOM were built at the 'School of Medicine' unit level but the ability exists to develop templates at a more granular level if needed
Unit	An administrative unit is equivalent to a SOM department or division
Workflow	The progression of a case either forward or backward for continued processing

## Appendix B - Questions Frequently Asked by Candidates

Question	Answer
Is there a file size limit for my packet?	There's no size limit for the packet, but there is a size limit per document. Files can be up to 100MB in size. During the upload process, RPT will convert all files to PDF format. If a file is too large, there are free websites, like <a href="http://smallpdf.com">smallpdf.com</a> , that will condense it for you.
What types of files can I upload to my packet?	When adding a file to a section, you have the option to add a file from your computer, your Dossier account, or link to a webpage or a video hosted on YouTube or Vimeo.
Can I make changes to my packet after I submit?	The packet will "lock" upon submission. If you need to make any changes, you will need to reach out to your administrator.
I don't see a "save" button in the packet. What if I need to finish uploading documents at a later time?	The system will auto save as you upload documents. Forms are the only sections of your packet that don't auto save. You must complete all of the required questions in a form before you leave the page in order for your responses to save.
Can I rename a document once I've uploaded it to RPT?	Yes, see RPT product help for more information.