

Faculty of Arts and Science
Interfolio ByCommittee P&T®
Review, Promotion and Tenure Dossier Submission
Guidelines for Administrators

Faculty of Arts and Science now utilizes the Interfolio ByCommittee P&T® platform for submission and review of all dossiers for faculty appointment, promotion and tenure requests. The system creates a secure, user friendly interface that allows administrators to easily assemble a packet of materials for their candidate review and submit these materials online. Templates are set up to build dossiers in each of the three faculty series: Mandatory Tenure and Promotion Review, Promotion Review and External Senior Recruitment Review. The system is designed to move dossiers through a workflow utilizing “Committees.” Several different committees can be initially set up in each department to function in this workflow, and instructions on how to modify those committees, as well as add additional committees, can be found in this document.

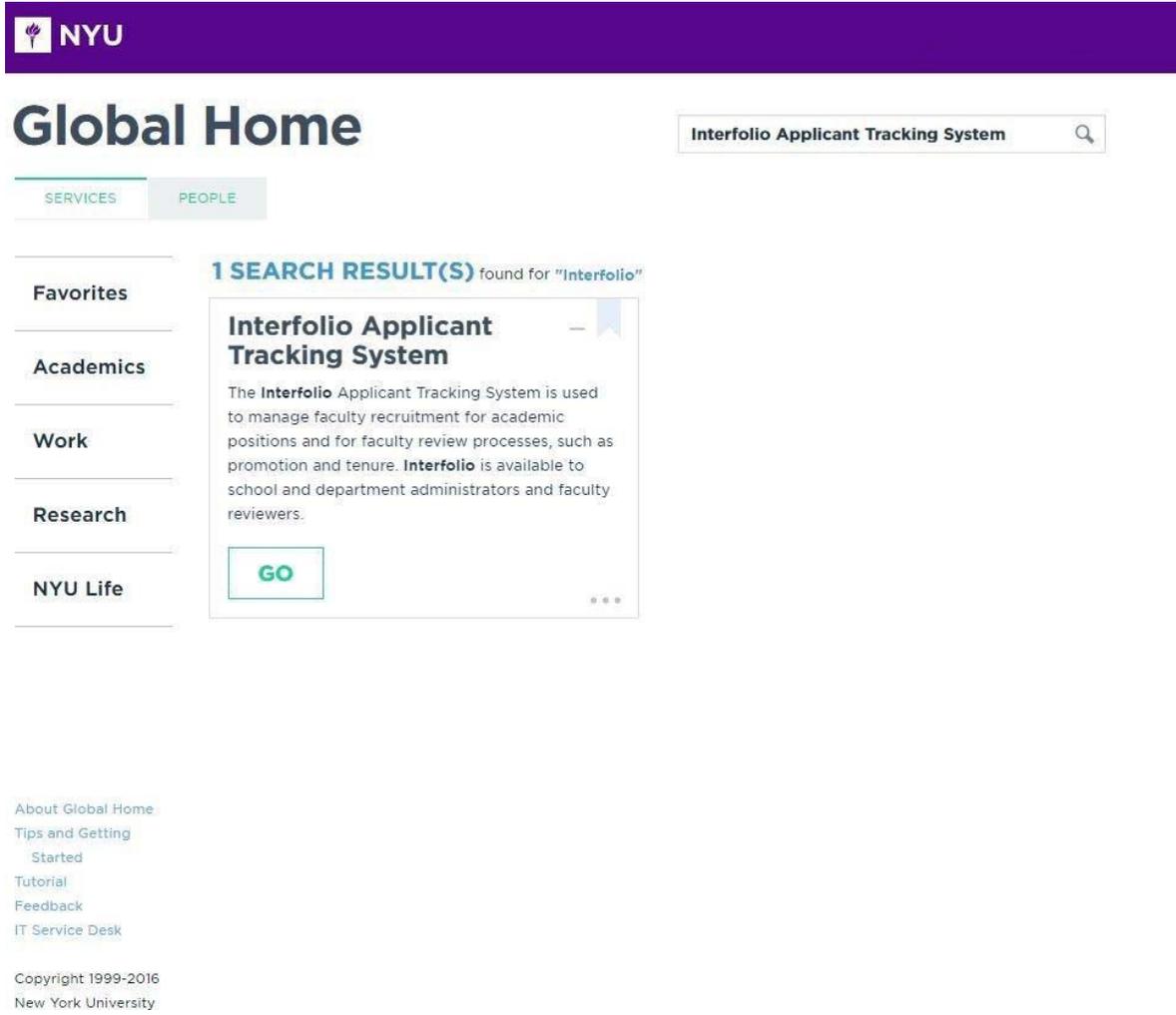
Please note: Departments have the option of using Interfolio at the various workflow steps of the case or use the system as only a platform to upload candidate’s files.

A. Access and Logging in to System

Administrative Access - Each department has at least one administrator assigned who will have access to the highest department level within the system, with the ability to move dossiers forward and create committees. Any other administrative staff within the department can have access to the system; however, their level of access should either be restricted at the section or division level (if that is how the department wants to manage dossiers), or they can be assigned access to one or more staff to assist in the dossier compilation.

Candidate Access – FAS prefer Administrators at the department level, to access faculty cases and have full control in submitting dossiers on the candidate's behalf in the coming year as users in the system. If the department wishes to have the candidate upload their own materials to the case, please contact the Office of Faculty Advancement for approval and instructions. Please do not invite a faculty member to begin their dossier until they have been added as a user, or they will not be recognized in the system.

Logging in to Interfolio ByCommittee P&T - All administrative users can access ByCommittee P&T through the Interfolio log-in page. You may sign in using NYU’s Global Home portal log-in and search for "Interfolio Applicant Tracking System."

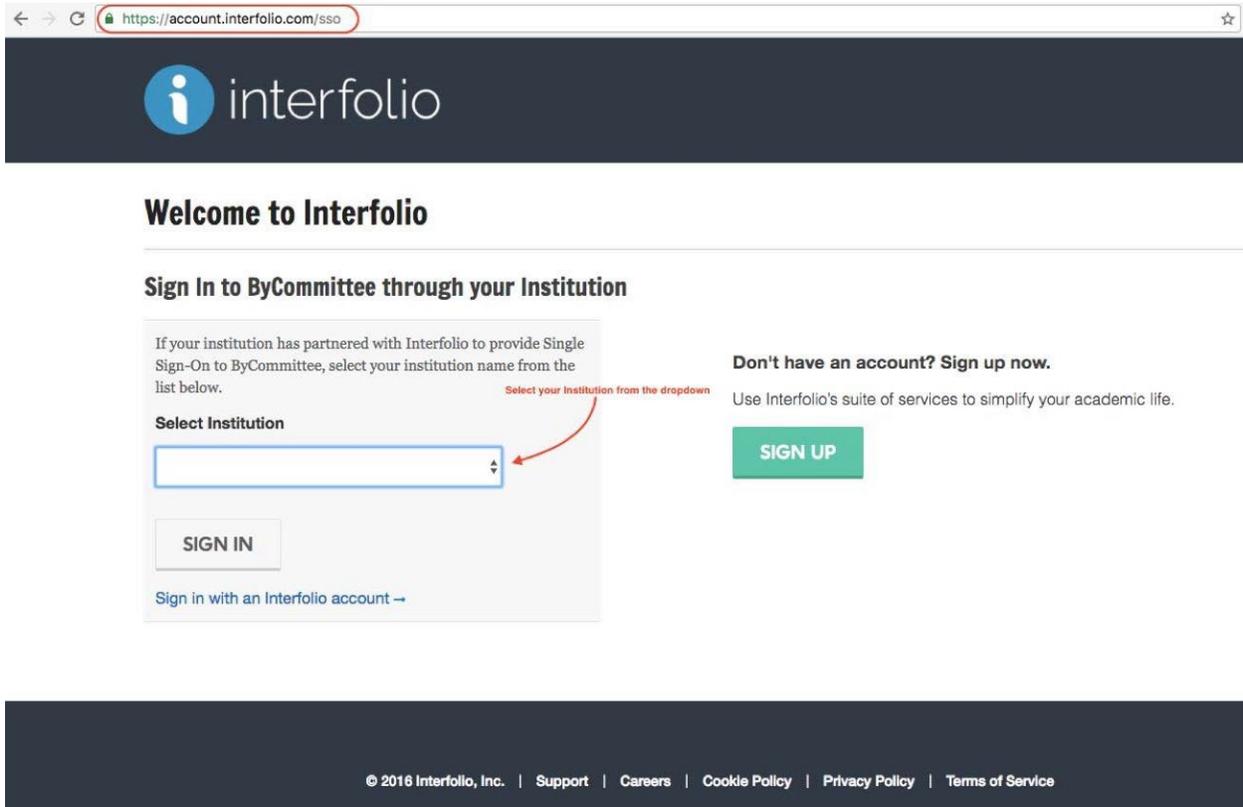


The screenshot shows the NYU Global Home interface. At the top, there is a purple header with the NYU logo and the text "NYU". Below the header, the main heading "Global Home" is displayed on the left, and a search bar on the right contains the text "Interfolio Applicant Tracking System". Underneath the search bar, there are two tabs: "SERVICES" and "PEOPLE". The search results section shows "1 SEARCH RESULT(S) found for 'Interfolio'". The result is titled "Interfolio Applicant Tracking System" and includes a brief description: "The Interfolio Applicant Tracking System is used to manage faculty recruitment for academic positions and for faculty review processes, such as promotion and tenure. Interfolio is available to school and department administrators and faculty reviewers." Below the description is a green "GO" button. On the left side of the page, there is a vertical navigation menu with categories: "Favorites", "Academics", "Work", "Research", and "NYU Life". At the bottom of the page, there is a footer with links for "About Global Home", "Tips and Getting Started", "Tutorial", "Feedback", and "IT Service Desk", along with copyright information: "Copyright 1999-2016 New York University".

OR

The URL for Interfolio is: <https://account.interfolio.com/login> . Click on “Sign in with Partner Institution” and then choose “New York University” from the drop-down list, and click “Sign In.” This will take you to the NYU Portal, where you will provide your NYU credentials.

****Users with Non-University Email Accounts** – Users with non-NYU email accounts will need to create an Interfolio account and log in directly on the welcome screen without going through the partner institution. Please ensure that they have already been set up as a user in the system so that they are not asked to pay for an Interfolio account.

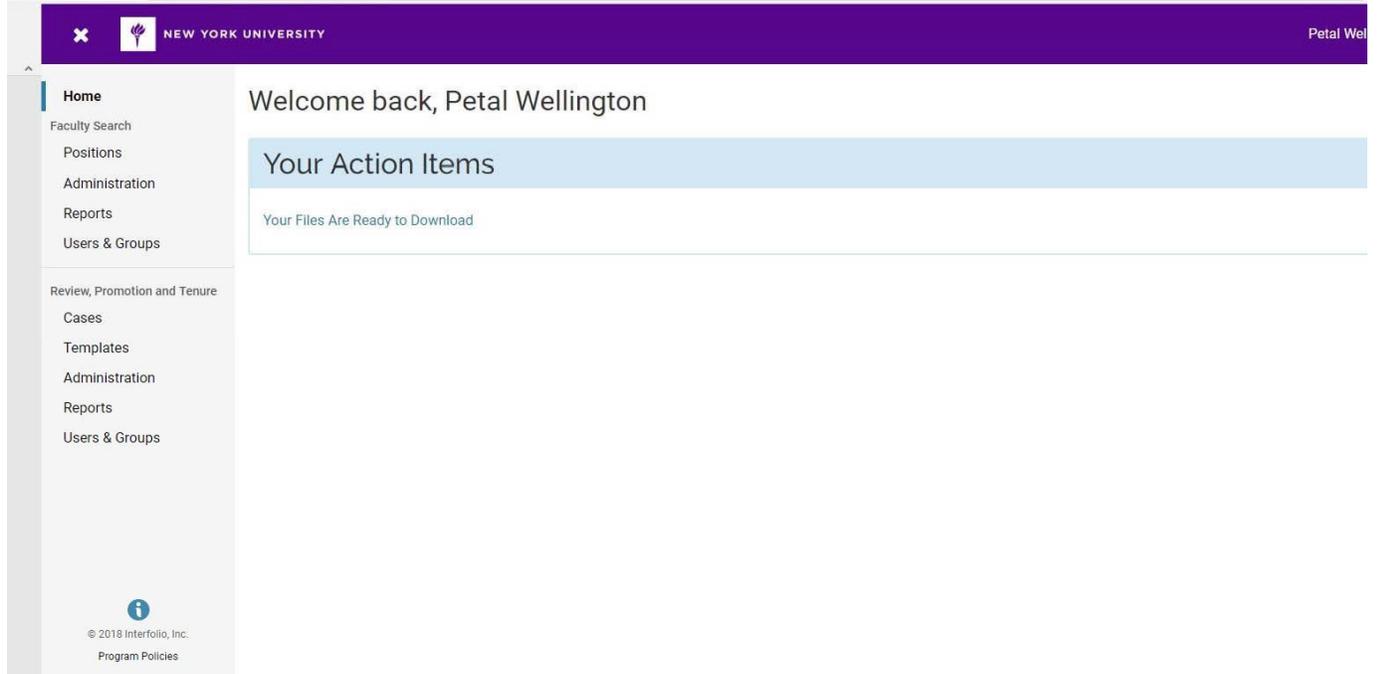


The screenshot shows a web browser window with the URL <https://account.interfolio.com/sso>. The page header features the Interfolio logo. Below the header, the text "Welcome to Interfolio" is displayed. The main content area is titled "Sign In to ByCommittee through your Institution". It contains a form with a "Select Institution" dropdown menu, a "SIGN IN" button, and a link "Sign in with an Interfolio account →". A red arrow points to the dropdown menu with the text "Select your Institution from the dropdown". To the right of the form, there is a section titled "Don't have an account? Sign up now." with the text "Use Interfolio's suite of services to simplify your academic life." and a green "SIGN UP" button. At the bottom of the page, there is a footer with the text "© 2016 Interfolio, Inc. | Support | Careers | Cookie Policy | Privacy Policy | Terms of Service".

Please note:

1. Interfolio works best with Google Chrome as your Web Browser. The latest version of Internet Explorer, Mozilla Firefox, Safari also supported, but may have more glitches. For best functionality, keep your browser up to date.
2. If things look funky on your screen- try clearing your cache.
3. Document formatting/size/bookmark issues: try smallpdf.com

All users should see this box:



Click “Cases” under Review, Promotion and Tenure to access the system and view the case/s under review you’re your department.

B. Dossier Templates

Templates are only created by Office of Faculty Advancement. There are only three templates for Promotion and Tenure Reviews: Mandatory Tenure; Promotion Only and Immediate Tenure. Candidate documentation requirements can be customized and department administrators have the ability to add or delete sections not applicable to the case. Case review steps create workflows for each case. Department administrators have the ability to move a case forward and backward as needed.

C. Managing Departmental Committees

Administrators can create and manage departmental committees in the workflow. The following committee placeholders were set up for each department:

1. Department Review - This is the first step in the workflow. The Administrator assigned to the case will be providing overall management of this process. This person will have the ability to move dossiers forward.

2. Department Advisory Committee - Administrators can add committee members to this case review section to access candidate files. Departmental Committee Report can be uploaded in this section.
3. Department Chair Review - Department Chair may be added to review final docket and upload Chair's Recommendation Letter.

You can now add individuals to these Departmental Committees by clicking on on “User & Group Management”:



Click on “Committees” and then  Name the committee, select the unit, then click “Save.” You will then select committee members from a list of users in your unit.

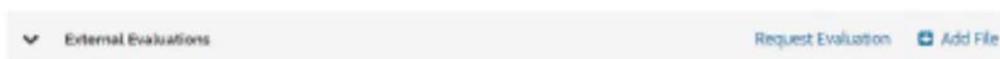
The following committees are committees set up at the School level and will be populated at that level.

4. Associate Dean’s Office Review – this is the first step after the department has approved the dossier. The dossier will come to the Dean’s Office to make sure everything is complete.
5. Divisional Dean's Review - dossier is reviewed by the appropriate Divisional Dean.
6. Reader's Review - Two members of the Dean's Advisory Committee are designated as primary and secondary readers and assigned to read selected published works of the candidate.
7. FAS Dean’s Advisory Promotion and Tenure Committee – initial review by FAS Promotions Committee.
8. Provost's Office Reviews – final reviews by Provost Office.

D. Requesting Letters of Reference

Departments can request letters of reference, both internal and external, for the candidate in one of two ways:

1. **“Request Evaluation”** Tool. Click on the “Request Evaluation” button at the bottom of the candidate’s Documents list.



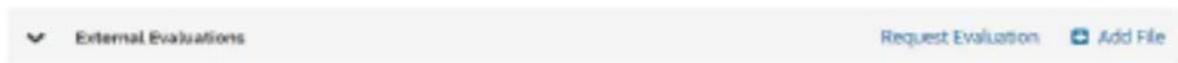
You can then identify the individuals to receive the requests, as well as provide a message and add documents for the individual to review (e.g., candidate’s CV, preliminary materials). If you choose to include additional documents for the individual to review, you must add a section to the Dossier and upload those documents. That will allow you to add them to the request.



OR

2. Request Reference Letters Outside of System. The second way to request reference letters is to request them outside of the system (whatever your process has been in the past), and add them to the dossier by clicking on “Add File” on the External Evaluations Section.

IMPORTANT: If the letters are added to this section, the faculty member does not have access to the letters.

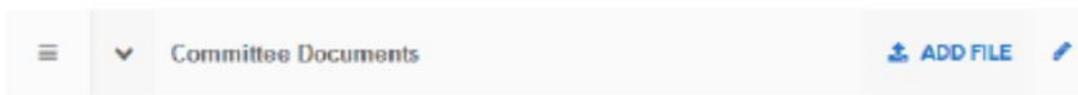


All external reference letters outside of candidate’s department) are confidential and cannot be viewed by the candidate. By including them in the External Evaluations section, they are not viewable by the candidate.

E. Managing Cases

1. Department Advisory Committee and Chair Review of Dossier. Once a dossier has been forwarded to the Department Advisory Committee, individuals on that committee will be notified, and the dossier will then be visible in their Dashboard. When they click on the dossier, they will see the contents of the dossier, including Reference Letters. A new section will also

appear in the dossier at this time, “Committee Documents,” which is where the Department Advisory Committee and the Department Chair letters will be uploaded:



Department Advisory Committee Members and the Department Chair can either read the dossier on the screen by clicking on “Read” at the top, or download the dossier into a PDF. If they download the dossier, an email will be sent to them with the link to the PDF, or they can retrieve it by clicking on the notification “bell” at the top right of the screen.

Committee Members can also communicate with other committee members either through the comments section, or by email. Click on “Case Details” to access these functions.

Please note: Departments do not have to use those sections if committee members are not comfortable using Interfolio this way. Departments can use Interfolio as a platform to upload candidates files.

2. Dossier Submission to Dean’s Office. Once the dossier has been reviewed by the Department Advisory Committee chair and the appropriate letters have been added, click on “Send Forward” to move the dossier to the Dean’s Office. Administrators should review the dossier for completeness. Please clearly title each file and follow the FAS Docket Checklist for required items. Once the Administrator moves the dossier forward to the Dean’s Office, it is only viewable at the department level by department ByCommittee P&T administrators. If there are issues identified at the Dean’s Office, the department will be notified. The status button in the upper right will be changed by the Dean’s Office as needed.

E. Questions and Troubleshooting Problems

If you have specific questions regarding anything contained in this Guide, or you run into questions or problems as you begin to set up your committees or invite faculty to begin their dossiers, don’t hesitate to contact either Petal Wellington (pcw255@nyu.edu; 212-998-8067). If an issue requires assistance from Interfolio, please contact them at 877-997-8807 or help@interfolio.com