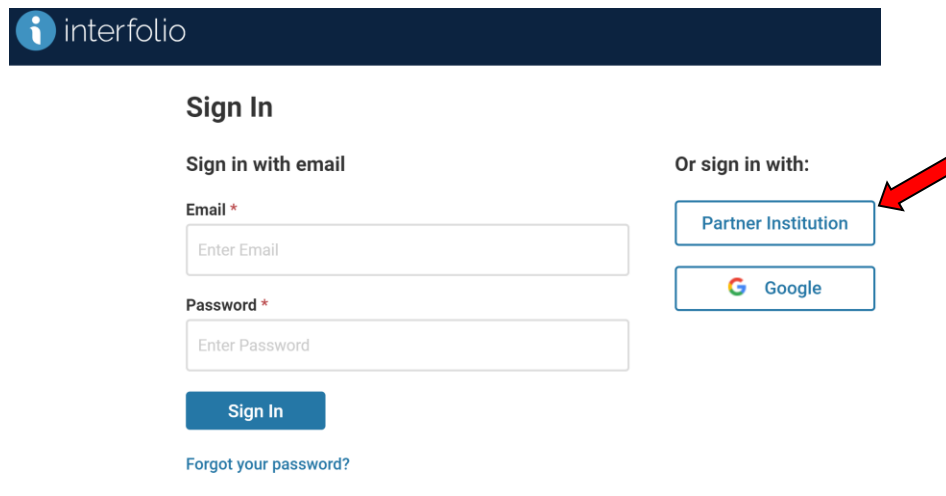
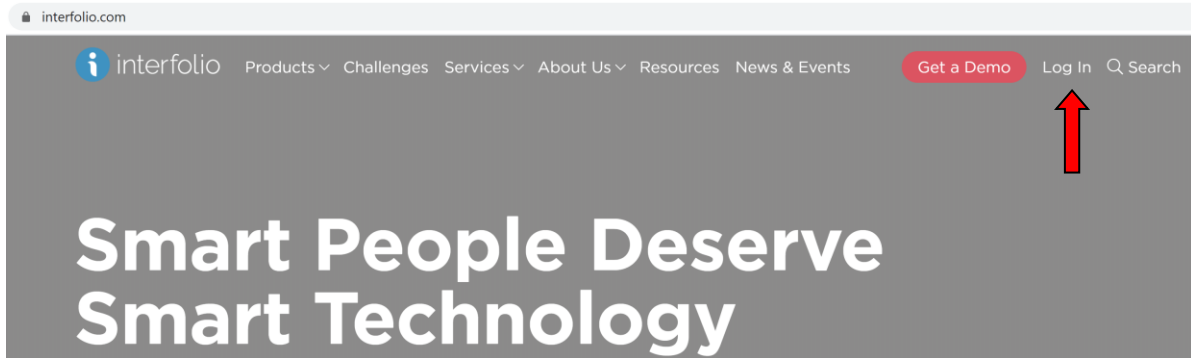


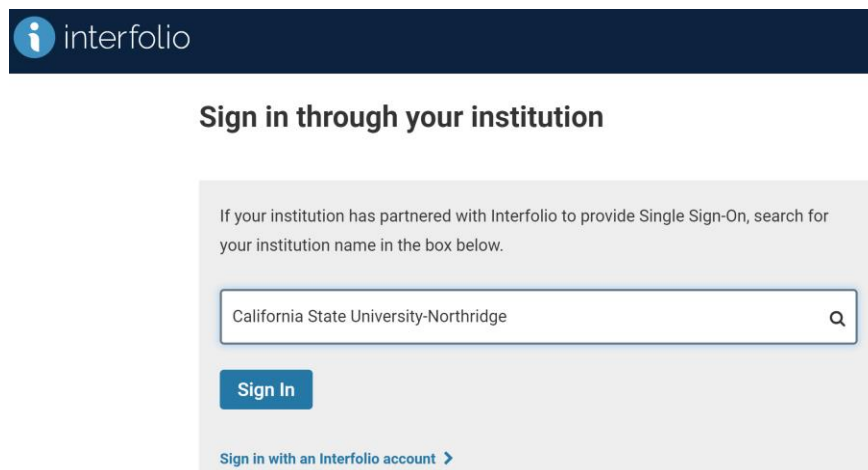
## Reviewers Step-by-Step Guide

### To access your assigned cases:

1. Log in to Interfolio.com. Click **Log In** followed by clicking **Partner Institution**.



2. Type in Northridge, select the campus name, click **Sign In**, and enter your CSUN portal credentials.

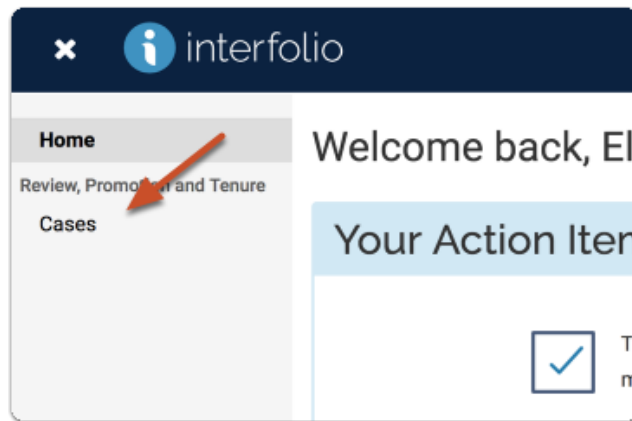


(cont.)

3. Select your **Institutional Account** (CSUN).



4. Select **Cases** under **Review, Promotion & Tenure** on the left-hand navigation bar.



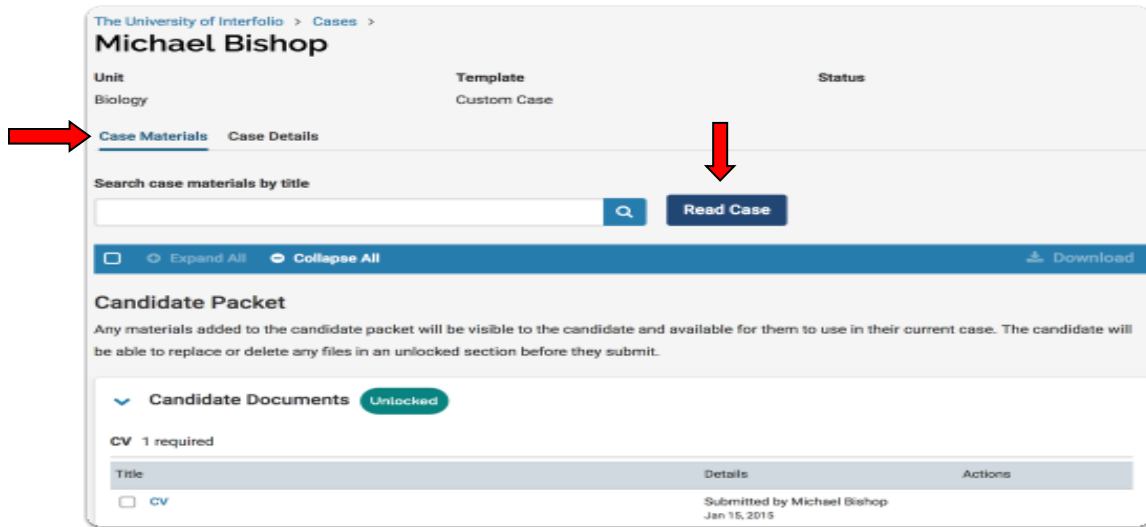
5. You will see a list of cases that are available to you. Click the name of the **Candidate** to view case materials (Candidate's Packet includes the ePIF and ePAF materials).

21 of 21 cases

<input type="checkbox"/> Name -	Type	Template Name
<input type="checkbox"/> <a href="#">Rita A. Bookman</a> Demo University	Promotion	Custom Workflow
Step 2 of 2: Provost Review   Jan 21, 2017 <span style="color: red;">▲</span> Required Documents		
<input type="checkbox"/> <a href="#">Edward Angerer</a> Historical Musicology	Appointment	Anthropology Promot
Step 1 of 3: Music History Promotion Committee		

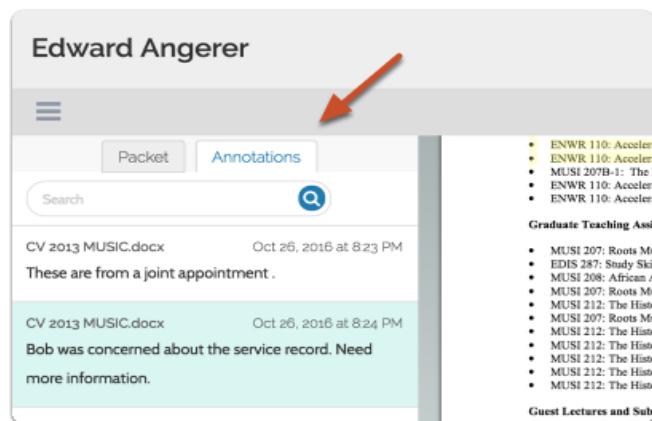
(cont.)

- The Candidate's Case automatically defaults to the **Case Materials** tab. You may read ePIF materials submitted by the candidate, committee members, and external evaluators by clicking **Read Case**. You will have access to the ePAF materials by scrolling to the "Internal Section" within the case.



### To make Annotations in the materials:

- You can make notes on materials as you review the file. The **Annotations** are private and can only be viewed by you.



- Click the **View** icon to toggle on or off the display of annotations.

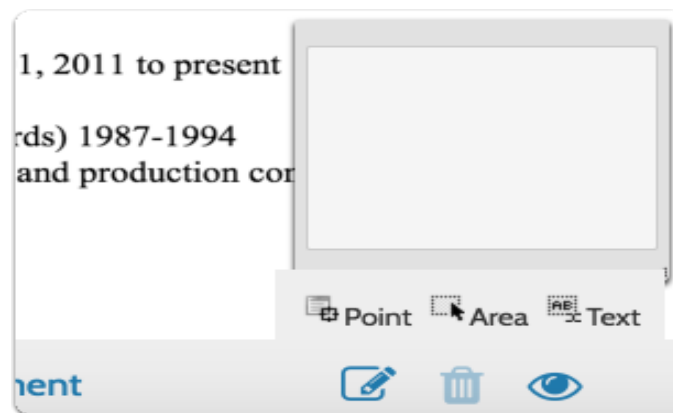


(cont.)

3. Click the **Note** icon to add an annotation on the currently displayed document.



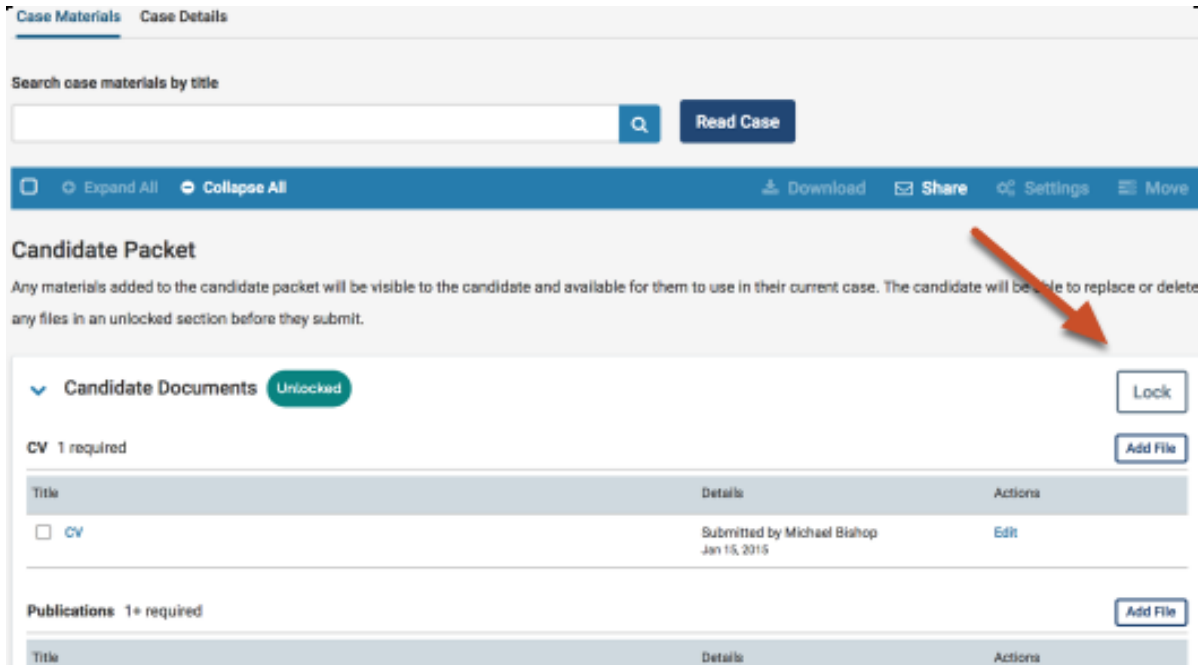
4. After clicking the Note icon, select the type of annotation you want to create:
  - Make no selection to add a simple **Sticky** note to the document
  - **Point** adds a note with an arrow pointing to a particular point in the document
  - **Area** adds a note about a selected area
  - **Text** adds a note about highlighted



(cont.)

## Turn On/Off Candidate Editing of Packet Materials:

1. Navigate to the case by clicking the candidate's name in your list of cases.
2. Click the **Lock** buttons to lock/unlock each of the candidate uploaded materials to enable or disable editing by candidate. Sections of the candidate's packet containing materials can be independently locked or unlocked to allow editing on a section by section basis. Be sure to lock the candidates packet materials by the department review date.



The screenshot shows the 'Case Materials' interface. At the top, there are tabs for 'Case Materials' and 'Case Details'. Below this is a search bar for 'Search case materials by title' and a 'Read Case' button. A blue navigation bar contains icons for 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move'. The main section is titled 'Candidate Packet' and includes a note: '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, there are two sections: 'Candidate Documents' (Unlocked) and 'Publications' (1+ required). The 'Candidate Documents' section has a 'Lock' button and an 'Add File' button. It contains a table with one row: 'CV' (checkbox), 'Submitted by Michael Bishop Jan 15, 2015', and 'Edit'. The 'Publications' section also has an 'Add File' button and a table with columns for 'Title', 'Details', and 'Actions'.

Title	Details	Actions
<input type="checkbox"/> CV	Submitted by Michael Bishop Jan 15, 2015	Edit

(cont.)

## Uploading the Personnel Decision Letter, Rebuttal, Recommendation on RTP, and Committee Voting:

**Please Note:** After the **10 days** of emailing the Personnel Decision letter to the candidate, you are required to upload the **final** Personnel Decision Letter.

1. First, if a rebuttal was provided by the candidate, upload the letter to your appropriate reviewing agency Section located in **Case Materials** tab (case default page) in the **Internal Sections** by clicking **Add File**.

**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.

You are asked to submit required items as part of this case. [View](#)

> ePAF Edit Add File

Department Committee Review Letter Edit Add File

After the **10 days** of emailing the Personnel Decision Letter to the candidate, upload the **Rebuttal letter here, if provided by the candidate**. Go to **Case Details** to upload the Personnel Decision Letter.

**Materials**

Title	Details	Actions
<input type="checkbox"/> Rebuttal Letter from Candidate	Added by Albert Alcazar Oct 7, 2020	<a href="#">Edit</a>

2. Next, click the **Case Details** tab to upload the final Personnel Decision Letter after 10 days from emailing the letter to the candidate.

Under Required Items: click **Add** to upload the Personnel Committee Decision Letter and the Candidate's Rebuttal (if provided as one document).

**Please note:** When uploading the letter, be sure to select your review section

**Add Department Personnel Review Letter** ✕

[Upload a new file](#) [Select file from case](#)

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

Name \*

Section \*

(cont.)

California State University-Northridge > Cases >

# New Candidate

**Send Case** **Case Options**

**Unit**  
Department of Systems & Operations Management

**Template**  
Systems and Ops Management: Retention, Tenure and Promotion

**Status**  
[Select Status](#)

Case Materials **Case Details** 2

**Reviewing as**  
Systems and Ops Management DPC [change](#)

**Required Items** 2 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. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

**Department Personnel Review Letter** + Add

No files have been added to this section.

**Forms**

Form Name	Assignee	Actions
<b>Personnel Committee Recommendation for Second Year RTP Candidate</b> 2 required questions	Committee Managers	<a href="#">Manage Respondents</a>
<b>Personnel Committee Recommendation for Second Year RTP Candidate</b> 2 required questions	Albert Alcazar (You)	<a href="#">Fill Out Form</a>

- Next**, click **Fill Out Form** to recommend or enter vote for Retention, Tenure, Promotion, etc. (See Fill Out Form instructions below).

**DO NOT ENTER** the committee vote under Voting Results.

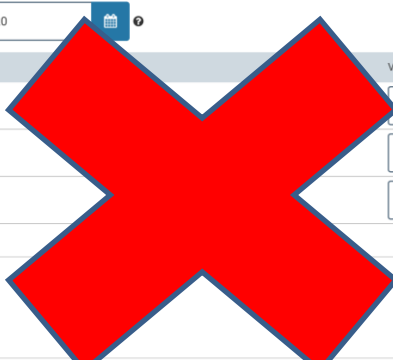
**Voting Results**

Date: Oct 6, 2020

Decision	Votes
Support	0
Oppose	0
Abstain	0

Notes

**Save**



(cont.)

The **FILL OUT FORM** for Committee Chairs, Dept. Chairs, and Deans

Committee Final Recommendation/Decision: Select appropriate final recommendation. Each decision made requires an independent vote (e.g.: Retention and Early Promotion)

### Personnel Committee Recommendation and Vote for: 3 to 6 Year and Promotion

The reviewing agency is required to select an RTP recommendation and enter the committee votes.

**IMPORTANT:** Each decision (Retention, Promotion, Tenure, and Termination) made by the committee, requires an independent vote. Please indicate the numerical vote for each decision with positive votes (in favor of) first.

**Personnel Committee Recommendation: 3 to 6 Year and Promotion Review \*** Options ▾

This section indicates the committee's final recommendation. Please select the appropriate decision.

- Retention
- Termination
- Promotion and Tenure
- Promotion Only
- Tenure Only
- Retention and Early Promotion & Early Tenure
- Retention and Early Promotion
- Early Promotion Only
- Early Tenure Only

#### The Committee Vote

The **vote** for Retention and Early Promotion (example): this requires two independent votes for two categories: Retention and Early Promotion. (If a candidate also requested Early Tenure, a vote for that category would also be required). Fill-in “**N/A**” for categories that are not applicable. Lastly, click **Submit**.

**Indicate vote for Retention \*** Options ▾

You are required to provide a short answer in the field below. Please indicate your vote for **Retention**. If Retention is not applicable please indicate as "**N/A**".

Indicate the positive vote (in favor of) first as in the following examples:

Example 1: (3-0) Retention, (2-1) - Retention, or (0-3) No Retention

Example 2: N/A

(2-1) - Retention

---

**Indicate vote for Promotion \*** Options ▾

You are required to provide a short answer in the field below. Please indicate your vote for **Promotion**. If Promotion is not applicable please indicate as "**N/A**".

Indicate the positive vote (in favor of) first as in the following examples:

Example 1: (3-0) - Promotion, (2-1) - Promotion, or (0-3) - No Promotion

Example 2: (3-0) Early Promotion, (2-1) - Early Promotion, or (1-2) - No Early Promotion

Example 3: N/A

(1-2) - No Early Promotion



## Department Chairs and Deans Recommendation

The **recommendation** on Retention and Early Promotion (example) requires two independent recommendations for two categories: Retention and Early Promotion. *(If a candidate had also requested Early Tenure, a recommendation for that category would also be required).* Please fill-in “**N/A**” for categories that are not applicable. Lastly, click **Submit**.

### Indicate Recommendation for Retention

Options ▾

Please indicate **Yes** or **No** for the Retention recommendation. If the recommendation is not applicable, please indicate "N/A". Please see examples:

Example 1: **Yes - Retention** or **No - Retention**

Example 2: **N/A**

Yes - Retention 

### Indicate recommendation for Promotion

Options ▾

Please indicate **Yes** or **No** for the recommendation on **Promotion**. If Promotion is not applicable please indicate as "N/A". Please see examples:

Example 1: **Yes - Promotion** or **No - Promotion**

Example 2: **Yes - Early Promotion** or **No - Early Promotion**



Example 3: **N/A**

No - Early Promotion 

## PAF REVIEWER CERTIFICATION

All Reviewing agencies (Chairs of Personnel Committees, Department Chairs, and Deans) are required to complete the **PAF Reviewer Certification Form** to certify that you have accessed the Personnel Action File. Click on **Fill Out Form** to complete.

### Forms

Form Name	Assignee	Actions
Recommendation for 3 to 6 Year and Promotion 1 required questions	Committee Managers	<a href="#">Manage Respondents</a>
PAF Reviewer Certification 3 required questions	Committee Members	<a href="#">Manage Respondents</a>
 PAF Reviewer Certification 3 required questions	Albert Alcazar (You)	<a href="#">Fill Out Form</a> 

(cont.)

Click the check box, enter initials, enter date, and submit form.

### PAF Reviewer Certification

**PAF - Reviewer Certification/Acknowledgement \***

As a reviewer of the RTP Candidate Personnel Action Action File (PAF) and to remain in compliance with Section 600, Administrative Manual, please certify that you have reviewed the PAF by checking the box below and entering your initials.

Please check the box to complete requirement

Please enter your initials in the field below. \*

Please select today's date. \*

Date \*

Submit Form

Save Responses

Cancel

### Moving the Case Forward to the next Reviewing Agency

1. To move the case forward to the next level of review, scroll to the top of the case page and click on **Send Case** and select the reviewing agency.

California State University-Northridge > Cases >

Unit [redacted]

Status ● 2nd Year Reviews [change](#)

Case Materials Case Details

**Send Case** ▼

Forward to [redacted] Personnel Committee

(cont.)

2. A template email will then pop up for you to write a message to the next reviewing agency. Type in a subject, email message and lastly click **Continue**. The case will move to the next level for review. (See next page).

### Send Case Forward ✕

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

████████████████████ | 1 members

The following reviewers will gain access to the case:

████████████████████: Personnel Committee | 3 members

████████████████████: Chair Review | 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 \***

████████████████████ 2nd Year Case

**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

