

Interfolio Checklist for RTP

This is a brief list of RTP responsibilities by role through Interfolio. Interfolio's candidate guide is available at: <https://product-help.interfolio.com/m/33238/l/658092>

Role: Candidate

- Login to Interfolio through the myHumboldt portal by clicking on the Interfolio logo in the Faculty/Staff Resources drop-down menu.
- RECOMMENDED:** Use Dossier as a personal storage area for all of your professional documents. It is recommended that you use the Collections feature to group your documents by section for easy transfer into your WPAF. For information, see the [Collections guide from Interfolio](#).
- Complete your RTP packet through Interfolio by uploading documents directly, or pulling from your Dossier. Rearrange document order within each section after you upload or transfer from Dossier.
- REMINDER: Use recommended [Document Naming Conventions](#) for all documents to create a more organized and readable file for reviewers. Documents should be ordered in reverse chronological order within each section.
- Once you have uploaded all documents to your packet and created any additional sections, use the Submit button in Interfolio to submit your file prior to or on the file due date by 11:59 PM. *Remember that although you are submitting your packet for review, you will still have access to your case up until the file close date to make additional adjustments. Your file should be complete as possible with only minor edits needing to be made upon submission.*
- In consultation with your IUPC, finalize organization of documents to complete your file by 11:59 PM on the file close date posted on the [Personnel Action Dates calendar](#). Once the file closes, no changes can be made without approval of the UFPC. Your file will automatically be moved forward by the college designee in preparation for your department's IUPC review.
- IMPORTANT: Candidates or IUPC committee members may upload any letters that arrive between the file due date and the final close date (~1 week after the file due date).

Role: IUPC Committee Members

- Login to Interfolio through the myHumboldt portal by clicking on the Interfolio logo.
- Review the candidate case during the ~1 week review period (between the file submission date and the file close date) posted on the [Personnel Action Dates calendar](#) and assist the candidate in finalizing their file.
- IMPORTANT: Review Section 2 carefully to ensure all previous review and recommendation letters are included in this section. Once the file closes, complete a detailed review of the candidate's file and assist in the preparation of the candidate's recommendation letter in consultation with the IUPC Chair.

This chart illustrates the letters a candidate should have from their prior reviews:

Year	Review Type	Letters from Reviewers
1st year at HSU*	Modified Performance Review (MPR) Group I	IUPC, Department Chair (optional), and Dean (Reappointment)
2nd year	Working Personnel Action File (WPAF) Group III	IUPC, Department Chair (optional), CPC, Dean, UFPC, and Provost

3rd year	Performance Evaluation (PE) Group II	IUPC, Department Chair (optional, and Dean
4th year	Working Personnel Action File (WPAF) Group III	IUPC, Department Chair (optional), CPC, Dean, UFPC, and Provost
5th year	Performance Evaluation (PE) Group II	IUPC, Department Chair (optional, and Dean
6th year	Working Personnel Action File (WPAF) Group V	IUPC, Department Chair (optional), CPC, Dean, UFPC, Provost, and President (Tenure/Promotion decision)

*Note that service credit may alter this schedule. For example, faculty appointed the prior Spring (with service credit for Fall) are subject to a full performance review, and submit a Group III file their first full academic year.

Note: Please ensure the file also includes the faculty member's original letter of hire.

Role: IUPC Committee Chair/Department Chair

- Login into Interfolio through the myHumboldt portal by clicking on the Interfolio logo.
- Review the candidate case during the ~1 week review period (between the file submission date and the file close date) posted on the [Personnel Action Dates calendar](#) and assist the candidate in finalizing their file.
- IMPORTANT: Review the letter log in and the ePAF to ensure all letters have been uploaded to the candidate's file before the file closes.
- Email the complete recommendation letter to paf@humboldt.edu for notification to the candidate and uploading to Interfolio.

Role: Department Chair (If not on the IUPC)

- Login into Interfolio through the myHumboldt portal by clicking on the Interfolio logo.
- Once the file closes, complete a detailed review of the candidate's file and prepare the candidate's recommendation letter and submit it to paf@humboldt.edu for notification to the candidate and uploading to Interfolio.

Role: Academic Personnel Services

- Move files forward to each level of review based on posted dates on the [Personnel Action Dates calendar](#).
- Use recommended [Document Naming Conventions](#) for all documents uploaded.
- Email recommendation letters to candidates and any prior review levels with 10-day response notification.
- Upload any candidate responses submitted during the 10-day response period following receipt of a recommendation letter.
- Email response letters to all prior levels of review.