Interfolio basics

Electronic portfolios for CSUMB Retention, Tenure, and Promotion reviews
What is it?

• Dossier is a private repository for faculty documents
  – No storage limit
  – Can be used as staging area for reviews

• CSUMB section is for review processes
  – Faculty submit materials for review
  – Committee members review materials

• Cloud-based
User sign-in

Mark's Dashboard

Class schedule
You have no current courses.

Madness on the Border: Child/Family Separations - MSW Panel
Tuesday, October 16
2:00pm — 3:50pm

MCAT Strategy Session with the Princeton Review
Thursday, October 11
6:00pm — 7:00pm

Teknova Information Session
Thursday, October 18
12:15pm — 1:30pm

Zumba with Monte!
Sunday, October 14
Welcome back, Oscar Otter

Your Action Items

Oscar Otter
Tenure and Promotion Review | Cinematic Arts & Technology Department | Other
Dossier

Interfolio Office Closed for Labor Day Holiday
Scholar Services will be closed Monday, September 3, 2018 for the Labor Day holiday. All electronic deliveries and applications will continue to be processed according to our normal delivery schedule during this time. Paper deliveries received over the holiday weekend will not be shipped until Tuesday, September 4, 2018.

Dossier

Deliveries  My Letters of Rec.  Letters to Write
0 in progress  0 not received  0

Dossier Highlights

Webinar: Using Interfolio’s Dossier for Letters of Recommendation | Highlights and Selected Q&A

New features are here, including saving your letter writer as a contact

New feature: guaranteed quality check on all letters

How to Upload a Confidential Letter to an Online Application System

Submit Confidential letter recommendation to an online...
Materials
Guidelines

Your institution has granted you access to view guidelines based on review processes at your institution. To help prepare for a review process:
1) Search for and select guidelines to reference as you gather materials.
2) Click "Save"
3) The guidelines will appear in a "Saved Guidelines" section. There, click "Prepare for this Review", and you will get further instructions on how your Dossier can help you prepare for the review.
Guidelines (cont.)

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<table>
<thead>
<tr>
<th>Search for Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Unit</td>
</tr>
<tr>
<td>California State University-Monterey Bay</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Retention Review</td>
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<tr>
<td>California State University-Monterey Bay</td>
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<td></td>
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<tr>
<td>Periodic Evaluation</td>
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<tr>
<td>California State University-Monterey Bay</td>
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<td></td>
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<tr>
<td>Tenure and Promotion Review</td>
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<tr>
<td>California State University-Monterey Bay</td>
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<tr>
<td></td>
</tr>
<tr>
<td>Post-Tenure Evaluation</td>
</tr>
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<td>California State University-Monterey Bay</td>
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</tbody>
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Prepare for Review

Prepare for Tenure and Promotion Review / California State University-Monterey Bay

To help you prepare for this review, create a collection. Once you create the collection, you can add materials for this review to the collection while viewing the guidelines for this review.

Collection Name

Review Preparation (2018)

Continue  Cancel
Materials (cont.)

<table>
<thead>
<tr>
<th>Materials (cont.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparing for your review:</td>
</tr>
<tr>
<td>I here's how you can use Dossier to prepare for this review:</td>
</tr>
<tr>
<td>1. Add materials to this collection to meet the guidelines.</td>
</tr>
<tr>
<td>2. As you add materials, we suggest you tag the materials with the name of the requirement they fulfill.</td>
</tr>
<tr>
<td>3. When your review starts and you want to add materials to it, simply open this collection and filter by tag to find the materials for each requirement.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>The first section of the Scholarly Portfolio shall include an index of ALL materials in the portfolio followed by prefatory materials that provide context for subsequent descriptions and documentation of scholarly achievements.</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Integrative Narrative</th>
</tr>
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<tbody>
<tr>
<td>The Scholarly Portfolio shall include a three to five page Integrative Narrative that synthesizes and interconnects the contributions to scholarship in the four areas of scholarship. The Integrative Narrative unites all sections of the portfolio and ties achievements to the CSUMB Vision Statement. The narrative shall emphasize collaborative and integrative activities. It shall also provide an opportunity to reflect on professional growth and/or areas needing improvement.</td>
</tr>
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<tr>
<th>Prefatory Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Letter</td>
</tr>
<tr>
<td>Curriculum Vitae</td>
</tr>
<tr>
<td>Faculty Development Plan</td>
</tr>
</tbody>
</table>
Materials (cont.)

Add File

Upload  Video  Webpage

Drag & Drop your files anywhere or

Browse To Upload

[California State University
MONTEREY BAY
Extraordinary Opportunity]
Materials (cont.)

Add File

Choose Existing    Add New File

Upload  Video  Webpage

Thank You! Your files are uploading now. Please select the type of material you are uploading. You also have the option to edit the title of the file.

Test Index

Select Type

- ARDSAS Letter of Evaluation Form
- Award
- Bibliography
- C.V.
- Contact Reference
- Course Development
- Course Work/Assessments
- Cover Letter
- Creative Work
- Dissertation Abstract
- Essay
- Image
- International Financial Statements
- Job Market Paper
- List of courses taught
- Multimedia
- Nomination Letter
- Other Certification
- Other Document

California State University
MONTEREY BAY
Extraordinary Opportunity
Materials (cont.)
Materials (cont.)

![Image of Dossier interface showing 'My Materials' list with titles such as 'Test Review', 'Test Most Recent Review', 'Test Narrative', 'Test Narrative - University Service', 'Test Narrative - Professional Application', 'Test TOC - Professional Application', and more. The interface indicates these materials have been received on Aug 31, 2018 at 7:28 PM.]

---

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Review</td>
<td>Uncategorized</td>
<td>Received Aug 31, 2018 7:28 PM</td>
</tr>
<tr>
<td>Most Recent Review</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test Narrative</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test Narrative - University Service</td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
<td></td>
</tr>
<tr>
<td>Test TOC - Professional Application</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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California State University
MONTEREY BAY
Extraordinary Opportunity
Ready to add documents

- Your documents are now saved in the Dossier and may be accessed when creating your packet for review
Notification

California State University-Monterey Bay has initiated a review on your behalf.

VIEW CASE

Viewing your case will allow you to view requirements, read instructions, and submit your packet online.

Please create a packet for all RTP materials to be reviewed.

Powered by Interfolio | Support
Home page
Packet overview

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward submitting your packet.

- **Index**
  - Index of Portfolio Sections and All Supporting Documentation, 1 Required | 0 Added

- **Integrative Narrative**
  - Integrative Narrative, 1 Required | 0 Added

- **Prefatory Materials**
  - Appointment Letter, 1 Required | 0 Added
  - Curriculum Vitae, 1 Required | 0 Added
  - Faculty Development Plan, 1 Required | 0 Added
  - Annual Workload Plan, 1 Required | 0 Added
  - Copies of Most Recent Review, 1 Required | 0 Added

California State University
MONTEREY BAY
Extraordinary Opportunity
# Edit packet

## Packet Requirements

### California State University Monterey Bay > Overview

#### Your Packets

- Retention, Tenure, and Promotion
- Cases

#### Packet Requirements

<table>
<thead>
<tr>
<th>Section</th>
<th>Status</th>
<th>Minimum</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Index</td>
<td>✔️ INCOMPLETE</td>
<td>0 / 1 REQUIRED</td>
<td>1+ Required</td>
</tr>
<tr>
<td>- Index of Portfolio Sections and All Supporting Documentation</td>
<td></td>
<td></td>
<td></td>
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<tr>
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<td>✔️ INCOMPLETE</td>
<td>0 / 1 REQUIRED</td>
<td>1 Required</td>
</tr>
<tr>
<td>prefatory materials</td>
<td>✔️ INCOMPLETE</td>
<td>0 / 5 REQUIRED</td>
<td>1 Required</td>
</tr>
<tr>
<td>- Appointment Letter</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Select materials
Upload materials to sections

Packet Requirements
Oscar Otter

View Packet Instructions

Index

The first section of the Scholarly Portfolio shall include an index of ALL materials in the portfolio, followed by prefatory materials that provide context for subsequent descriptions and documentation of scholarly achievements.

COMPLETE

1 / 1 REQUIRED

Index of Portfolio Sections and All Supporting Documentation

1+ Required | 1 Added

Add File

Integrative Narrative
All materials uploaded

- Mentoring other faculty members;
- Participating in faculty search committees;
- Organizing, directing and/or implementing faculty development activities;
- Establishing and maintaining effective, collaborative working relationships with colleagues and other University personnel;
- Participating in academic program development.

**Student Support and Curriculum Development**

- Advising student organizations;
- Contributing individually and collaboratively to the development and improvement of the CSUMB outcomes-based academic program;
- Developing outreach activities and programs that enhance the University's ability to serve the needs of a diverse and non-traditional student body;
- Developing and maintaining services and programs that support the curriculum.

**University-wide Services**

- Facilitating presentations and/or performances that integrate residential living and learning on campus;
- Collaborating throughout the campus community on projects, workshops, presentations, and other campus activities.

[Review & Submit]
Review packet
Submit packet
Submitted packet

Thank You!
You've successfully submitted your packet and it will be sent to the appropriate committees for review.
Reviewer notification

California State University
Monteay Bay

Oscar Otter's case is now available for your review.

REVIEW CANDIDATE

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,
Melissa Manivann

The following documents must be uploaded before sending the case to the next step.
- University RTP Committee's Recommendation

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California State University
Monteay Bay
Extraordinary Opportunity
Reviewer sign-in
Case review

Case List

- Unit: All Units
- Type: All Types
- Active or Closed?: Active

1 of 1 cases

- Oscar Otter
  - Type: Other
  - Template Name: Tenure and Promotion Review
  - Status: 

Step 2 of 7: Department Committee Review | Feb 8, 2019

Required Documents

California State University-Monterey Bay

MONTEREY BAY
Extraordinary Opportunity
Case review (cont.)

Index

The first section of the Scholarly Portfolio shall include an index of ALL materials in the portfolio, followed by prefatory materials that provide context for subsequent descriptions and documentation of scholarly achievements.

- Index of Portfolio Sections and All Supporting Documentation
  - Aug 30, 2018 at 8:06 AM

Integrative Narrative

The Scholarly Portfolio shall include a three to five page integrative narrative that synthesizes and interconnects the candidate's achievements in the four areas of scholarship. The Integrative Narrative unifies all sections of the portfolio and ties achievements to the CSUMB Vision Statement. The narrative shall emphasize collaborative and integrative activities. It shall also provide an opportunity to reflect on professional growth and/or areas needing improvement.

- Test Narrative
  - Aug 30, 2018 at 8:06 AM

Prefatory Materials

- Test Appointment Letter
  - Aug 30, 2018 at 8:06 AM
Case review (cont.)
Upload recommendation

Unit
Cinematic Arts & Technology Department

Case Details

Committee Members: 2

- Mark Alabanza
  malabanza@csumb.edu
- Amy Thurman
  athurman@csumb.edu

Required Documents

All required documents 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.

Department Level Recommendation

Add
Upload recommendation (cont.)

Add Department Level Recommendation

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 *
Test Department RTP recommendation

Section *
Index
- Integrative Narrative
- Preliminary Materials
- Teaching and Learning
- Discovery, Creation, and Integration
- Professional Application
- University Service
- Department Committee Recommendation
- Dean Recommendation
- University RTP Committee Recommendation
- Provost Recommendation
- President’s Decision

Add  Cancel
Upload recommendation (cont.)

Oscar Otter

Unit
Cinematic Arts & Technology Department

Status
Select Status

Case Materials  Case Details

Committee Members: 2

Mark Alabanza
malabanza@csumb.edu

Amy Thurman
athurman@csumb.edu

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Department Level Recommendation

Test Department RTP recommendation

Email  Edit
Rebuttal period
Rebuttal period (cont.)
Rebuttal period (cont.)

<table>
<thead>
<tr>
<th>Packet</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinematic Arts &amp; Technology Department</td>
<td><strong>Open for Response</strong></td>
<td>Submitted</td>
</tr>
<tr>
<td>Tenure and Promotion Review</td>
<td>Other</td>
<td>Aug 30, 2018</td>
</tr>
</tbody>
</table>
Rebuttal period (cont.)
Rebuttal period (cont.)
Rebuttal period (cont.)
Rebuttal period (cont.)
Review completion

• All review levels will take place as outlined in the preceding slides
• University Personnel will facilitate process and provide reminders
• Process will follow schedule on Academic Personnel calendar
• Faculty will have access to packet and all shared committee recommendations upon completion
Questions?
Contact

• Melissa Manivanh, mmanivanh@, x4124  
  Academic Personnel Analyst

• Mark Alabanza, malabanza@, x4642  
  Assoc. Director for Academic Personnel