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.

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).

(cont.)
6. 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.

   ![Case Materials tab](image1.png)

**To make Annotations in the materials:**

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

   ![Annotations](image2.png)

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

   ![View icon](image3.png)

   (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
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.

   (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.

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

(cont.)
3. 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.
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)

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**.
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

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

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

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Assignee</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendation for 3 to 6 Year and Promotion</td>
<td>Committee Managers</td>
<td>Manage Respondents</td>
</tr>
<tr>
<td>PAF Reviewer Certification</td>
<td>Committee Members</td>
<td>Manage Respondents</td>
</tr>
<tr>
<td>PAF Reviewer Certification</td>
<td>Albert Alcuaz (You)</td>
<td>Fill Out Form</td>
</tr>
</tbody>
</table>

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

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.
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).