Step-by-Step Guide for Administrators

Requesting an External Evaluation Letter in Interfolio

All information regarding the policies and procedures of the External Evaluation process can be found in the “Internal Sections” area in each Interfolio case by scrolling past all of the Candidate Packet sections:

- Please review these instructions before requesting evaluations.
- These instructions can be accessed on the resources page if you want to review them before logging into Interfolio (https://tiny.utk.edu/interfolio).
- Note that you can solicit external evaluation letters outside of Interfolio. Just be sure to provide all the additional required documentation about these transactions.
- Instructions about soliciting letters outside of Interfolio are included in the resource document referenced above.

In this guide, you will find information about:

- Requesting External Evaluations
- What the Evaluator will See
- What you will See as Evaluations are Submitted
**Requesting External Evaluations**

Click on the “Request Evaluation” button located on the right of the “External Evaluations” tab:

<table>
<thead>
<tr>
<th>Internal Sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

- **External Evaluations: General Instructions**
- **External Evaluations: Materials Provided to External Reviewers**
- **External Evaluations: Template Letter**
- **External Evaluations: Log of Communications**
- **External Evaluations: Method of Selection and Qualifications**

You will be asked to provide information in all fields pictured below. Each field is explained in more detail on subsequent pages of this guide.
Request External Evaluation

External Evaluator Information

<table>
<thead>
<tr>
<th>First Name *</th>
<th>Last Name</th>
<th>Email Address *</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Last Name</td>
<td>Email Address</td>
</tr>
</tbody>
</table>

Add Another Evaluator

Message to Evaluator

Use this message to request an evaluation of the candidate. Your request can include a personal message to the evaluator and documents to aid the evaluator in their review. Once completed, evaluators submit their reviews through Interfile’s secure delivery system.

From Name

The University of Tennessee - Knoxville

Reply To

mgast3@tennessee.edu

Subject

Message Subject

Message

Files

Files added here can be downloaded by the recipient when they accept the invitation to provide an evaluation.

No files selected

Add Files

Response Settings

Deadline

The recipient will not be able to submit an evaluation after the deadline date.

MM dd, yyyy

Can the evaluator submit additional files? *

Indicate whether or not you want to allow the evaluator to submit additional supporting materials, such as a CV, along with the requested file.

☐ Yes, allow the evaluator to submit additional files.

☐ No

Access *

Choose who has access to this document.

Administrators & Entire Committee

Send Request

Cancel
Inviting Evaluators

You can invite evaluators one-by-one by adding their First Name, Last, and Email Address, or you can invite them all at once by clicking “Add Evaluator:”

If you send the invitation to multiple evaluators at once, Interfolio provides an option for personalizing emails sent to each evaluator as shown in the “Help with Messaging” text box below.
Message Body

The University template message to evaluators can be found at this link. You will need to customize the highlighted parts. Once you do this, you can copy and paste the letter into the “Message” box. You can also use your own letter, but if you do, you will need to upload a copy of it to the “External Evaluators: Template Letter” section in Interfolio, shown below.

Sharing Files with Evaluators

To share files that have been added to the candidate’s case in Interfolio with External Evaluators, click “Add Files.” (Note that if you are not ready to share files at this time, you can always email reviewers at a later date as described below. You can email reviewers as many times as you like through Interfolio.)

You will see the following dialog box and can select which documents to attach by selecting the box next to the file name.
You can also share all documents within a specific section by clicking “Sections:”

When the “Sections” box is clicked, a dropdown will appear showing all of the sections to which the candidate has added files:
Selecting a section in this menu will share *ALL* of the materials uploaded to that section with the External Evaluator(s).

Once all desired files are selected, click “Save.”

Please be sure to share the following files with the reviewer at some point during the evaluation period as they are required to be shared by the UTK Faculty Handbook:

- The candidate’s curriculum vitae
- Appropriate supporting materials concerning the candidate’s research or creative activity
- The departmental and collegiate statements of criteria for promotion and/or tenure.

You can also make use the "Link to External Repository of Scholarly/Creative Works" section of the dossier, which allows the candidate to upload a file that contains a link to an external repository (i.e., OneDrive, Google drive) that contains scholarly work (e.g., journal articles). You can share this section with external reviewers and also ask the candidate to include other materials in this repository.

**Important!** The candidate must *Submit* items for you to share them (i.e., click on the Submit button associated with the section, boxed in yellow below).
Once items are submitted only you or your administrative staff can unlock the section for the candidate to edit them.

If you share something with the reviewer via Interfolio and it is edited after it is shared with them, the reviewer will lose access to the file.

Resharing Items with Evaluators or Sending an Updated Email

You can reshare items with reviewers through Interfolio by sending them another email. This is done by selecting “Edit” on the far right, which will result in a dropdown that looks like this:

Select “Edit & Resend Request,” boxed in yellow above to bring back up the page used to initially send the evaluation. On this page, you can make any changes and upload or remove documents. When done, you will select “Send” to resend the request. Your evaluator(s) will receive an email that looks identical to the initial email they were sent but it will link to the updated information and materials.

Setting a Deadline for the Review and Requesting Additional Files

In the “Response Settings” section, you can set a deadline after which date an evaluation CANNOT be submitted. You can always change the submission deadline if someone needs extra time. Also note that you are not required to set a deadline, but it might be useful to the evaluator. 😊

Additionally, you are asked to select whether the External Evaluator can submit additional files to the evaluation as well as who can have access to the review. You should select “No” in response to whether evaluators can submit additional files. This is done to prevent them from uploading a CV, which will appear in the middle of the candidate’s dossier.

Please select “Administrators & Entire Committee” as the “Access” settings as the entire committee will need access to these materials to fully review the candidate’s case.

Once all fields have been completed, select “Send Request,” boxed in yellow below. Note, the box will not turn bright blue or allow you to click on it unless all required items are included. In the example image below, not all required fields have been filled so the request cannot be sent.
Once the Interfolio Request Has Been Sent

Personal Follow-up email after Interfolio Request is Sent

- We recommend you follow-up your request by sending a personal email letting the evaluators know to expect an email invitation from UTK/Interfolio (check spam folder!) and to please accept or decline the Interfolio request.

- Here are some points that we suggest you address in this personal follow-up:
  - To expect the email from UTK/Interfolio
  - To check their spam folder if the email doesn’t readily appear in their inbox
  - To accept/decline the invitation through the Interfolio email notification, NOT by replying to your personal email
  - If they choose to accept the invitation to complete an evaluation, to upload the evaluation directly through the Interfolio system, NOT by sending the completed evaluation to you directly
  - If you would like the evaluators to provide a CV, please have them send it DIRECTLY to you. Evaluators should not upload their full CV to Interfolio, as it will insert in the middle of the candidate’s dossier.

- If the evaluator happens to email you the letter and you are not able to direct them to upload it themselves, please upload it to the Interfolio case immediately so that the time stamp in Interfolio matches the date the letter was received.

- The log will show those who were asked via Interfolio but did not respond to the request, so you don’t need to worry if these people do not respond.

- Interfolio will send periodic reminders to reviewers. You can also resend requests and/or change the submission deadline if someone needs extra time.
What the Evaluator Will See

Each evaluator will receive an email that looks like this:

To view the request, the evaluator will select the “View Request” button, boxed in yellow above. They will be brought to a page that shows the details of the request as well as options to accept or decline the evaluation. It will look like this:
Note that the shared documents will NOT be visible unless the person accepts the request by clicking on the green “I Accept” button above.

**When a Request is Accepted**

Once accept is selected, the following additions to the screens shown above will be visible to the evaluator, replacing the “Decision” section:
The evaluator can choose to read the materials provided directly in Interfolio by selecting “Read All Materials,” boxed in yellow below:

[Image of Interfolio interface]

Selecting this option will bring them to the following view, like the view you will see if you select “Read Case” when you conduct your own review of the candidate.

[Image of candidate's materials]

The evaluator can also choose to download the materials you elected to attach to the request by clicking “Download” on the right of the document they would like to download, boxed in yellow below.
If the evaluator changes their mind and would like to decline the to submit an evaluation, they can do so by selecting the “I've changed my mind and decline to submit an evaluation” button located in blue text below the “I accept, I will submit an evaluation” text located within the decision section, boxed in yellow below.

Once the evaluator has completed their evaluation, they will click the “Add File” button located on the right of the “Confidential Evaluation” section, boxed in yellow below.
They will receive a screen where they should click “Browse To Upload,” boxed in yellow below.

The reviewer will be able to browse the files on their device or any other storage location to which they have access to select the appropriate file. Once the appropriate file has been selected, they should select “Open” to upload the file.

A successful upload will look like this:
The evaluator will then select “Add,” boxed in yellow above, to add the file as their review documentation. It will show up to replace “An evaluation has not yet been added in response to this request” box in the “Evaluation” section. It will look like this:

To fully submit the evaluation, the evaluator will have to click “Submit,” boxed in yellow above and then “Submit” again, boxed in yellow on the screen pictured below.

If they would like to change the file they have uploaded prior to submitting it, they can select “Replace” located on the far right, as boxed in yellow below.
When a review has been successfully submitted, the evaluator will receive the following screen, letting them know that their evaluation was submitted.

They will also receive the following email message:

You've successfully submitted an evaluation.

Thank you for completing an evaluation on behalf of Megan Gast. It will be delivered to the appropriate committees for review.

View Evaluation
When a Request is Declined

When an evaluator declines the request by clicking the red “I Decline” button on the opening page shown above, the evaluator will see the following screen:

On this screen, they can change their minds and choose to submit an evaluation by selecting the “I’ve changed my mind and agree to submit an evaluation” button, boxed in yellow above. They can also message the committee by selecting the green “Message the Committee” button above.

Once the evaluator selects “Send Message,” they will see the following screen, letting them know that the response and message have been submitted.
Note that you will receive access to their decision regardless of whether they choose to submit a message along with it.

**What You Will See**

As a requestor, you will be notified when the evaluator declines a request or submits an evaluation.

When a request is declined, you will receive the following email:

![Email Image]

When an evaluation has been submitted, you will receive the following email:

![Email Image]

You can click on the blue space to view the review.

As a requestor, you can check the status of the evaluation by opening the “External Evaluations” section under “Internal Sections:”

![External Evaluations Image]
Once opened, you will be able to see the status of your requests. The example below shows the different statuses a request can have: declined, accepted, and requested.

The “Edit” function gives different options depending on the status type. For a declined evaluation or a submitted evaluation, you are only given the option to “Edit Settings,” shown below:

Through clicking “Edit Settings” for a declined request or submitted evaluation, you can change the name of the review, the section of the Internal Sections into which the review falls as well as who can gain access. You can also see the request details such as the person’s decision and their message (if applicable). An example is shown below:
For an accepted evaluation, you are given the options to “Edit Settings” or “Edit & Resend Request” shown below.

- “Edit Settings” will bring you to the same “Manage External Evaluation” page as shown in the example under a declined evaluation.
- The functionality of the “Edit & Resend Request” button is detailed in the Notes on Materials Provided to External Reviewers section above in this document.
- For evaluations that have been requested but have not yet received an answer, have three options, shown below.
• If you would like to cancel your request, you can click “Cancel Request” boxed in yellow above and then select “Delete Document” in red from the screen shown below. **Please DO NOT cancel unanswered requests as this is part of the log you are required to keep regarding the status of your requests.**

**Viewing the External Evaluations**

All external evaluations can be seen within the packet as can be accessed through the “Read Case” button. You can also read a specific evaluation by clicking on the evaluation title, an example of which is boxed in yellow below, which will bring you directly to that evaluation in the “Read Case” view section.