

Interfolio Best Practices

This document is a running list of some of the best practices and tips to keep in mind while processing files.

Bookmarking

- Do not upload a full bookmarked PDF file into Interfolio.
- The Interfolio materials viewer will maintain the previous bookmarks you added to the documents before uploading so it makes it hard to read and navigate.

Closing (or reopening) a File

- Once a file reaches the final step in the workflow, you can close the case if you are an administrator for the final authority of that file. In most cases, this will be the departmental AP contact.
 - Note: If your department notifies the candidate of the final outcome via Interfolio, leave the file open until you know that they have logged in and reviewed the information you sent them. Closing the file will remove the candidate's access to it.
- There are few different options to close a case.
- Instructions can be found [here](#).

Creating files with official UCSD emails

- UCSD's Interfolio user accounts have been set up using the user's official campus email address that is associated with their Single Sign-On account (8 letter maximum).
- These official email addresses are typically different than the email addresses that you are familiar with (which uses an email alias).
- Using the incorrect email will create a duplicate user account that will then have to be merged by Interfolio (so it may delay the file).
- There are two options to ensure you create the field correctly:
 - Look up the user's email address (and write it down) using the User & Group Management section before creating the case
 - Create cases using the [bulk case creation process](#) (you can still create only one file using this method)

Deleting a File

- Only institutional administrators (APS analysts) can delete a case in Interfolio. To mark a file that needs to be deleted, close the file and update the file status to "Delete." Instructions on how to change the file status can be found [here](#). APS will review and delete these files periodically.

External Referee Letters

- If an external referee accepts the request to write a letter, but does not provide a letter yet, the timestamp in the system of the request will remain the date and time the request was sent from the department until the referee actually submits the letter.

- If an external referee declines to write a letter, they are given the option to include a declination message. If they choose to write a message, you will see a link next to their declination that says “View Message.”

File Document Order

- Documents need to be reordered into UCSD’s standard file order as they are added to the file.
- Please reorder the file before you send the file forward to the next step in the review.
- Standard file order (not all documents apply to all files):

Internal Sections

Summary & Employment History

- Summary form
- Employment history

Recommendations

- Dean letter
- SIOCAP/SOMCAP/SSPPSS CAP letter
- Departmental recommendation letter
- Ad hoc/Division letter/DOMCAP letter

External Evaluations

- Solicitation letter
- Ref ID list
- External referee letters

Candidate Packet

Candidate Documents (these section may vary between depts.)

- Research statement
- Teaching statement
- Service statement
- Evidence of teaching effectiveness
- Biography/Bibliography
- Sabbatical report
- CV
- Additional documents

Other/Supplemental Information

- Additional documents

Cert 1-A

Cert 1-B (if applicable)

Cert 2

Cert 3

File Naming Conventions

- Please use the Academic Senate's guide to bookmarking files while saving documents to be uploaded to a file
- The standard file naming conventions also need to be used in the notification subject lines when the file is forwarded to APS for review (ex. SMITH, JOHN- MED- AccelMerit- 07_01_18)
- The system automatically creates a bookmark for each document, so it can be confusing and hard to read if extra words or uncommon abbreviations are used.

File Status

- A file's status is not automatically tied to a specific review step in Interfolio, so the file status has to be updated manually if you choose to use this option.