

Interfolio Frequently Asked Questions

This document is a running list of some of the most frequently asked questions for using Interfolio.

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System

1. Which browser do I need to use while working on files?

- Interfolio can accommodate all of the most commonly used browser types: Google Chrome, Mozilla Firefox, Safari, and Internet Explorer. If you are experiencing blank pages, forms, or buttons that do not work, you may need to update your browser to the latest version or delete old files out of your cookies and/or cache. Instructions can be found [here](#).
- However, if you are downloading files and saving them outside of Interfolio, then it is recommended that you use a browser other than Mozilla Firefox if you would like to maintain the functionality of the bookmarks from Interfolio. Interfolio is working on correcting this, so this should only be a temporary issue.

2. What file types can be uploaded to a file?

- A list of the accepted file types can be found [here](#). During the upload process, Interfolio will automatically convert all files to PDF format for consistency. The file size limit is 100mb. Videos hosted by YouTube or Vimeo can also be uploaded, and they have a 500mb limit.

3. What do I do if need to create a case for someone who does not have a user profile in Interfolio yet?

- If the academic appointee is a current employee of UCSD, email [Brandy Cheshire](#) to get the user set up.
- If the appointee is being proposed for a new appointment, you can create a profile for them using their preferred email address and the accounts can be merged if they become UCSD employee.

File creation / File Prep Topics

- 1. Can I switch the file template if I select the incorrect one during file creation or the proposed action changes during departmental review?**
 - No, but you have two options to correct it:
 - Preferred method: You can close the current file, mark the status as “delete,” and open a new file on the correct template. You don’t need to wait for the old file to be deleted in order to start working on the new one.
 - You can keep working on the file that you started, but you need to notify your Dean’s office when you move it into their queue that the authority has changed. The Dean’s office will add in the step to get it to our office and we will take care of the rest. However, just be aware that the template name will remain the same on reports.

- 2. Can I delete a case?**
 - No, only institutional administrators (APS analysts) can delete a case. 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](#). No notice needs to be sent; APS will review and delete these files periodically.

- 3. Do we still need to submit links for the publications for files completed in Interfolio?**
 - Yes, continue to submit electronic publications via web link (ex. Dropbox link) until Faculty180 is launched.

- 4. Do we still need to upload a biobib for files completed in Interfolio?**
 - Yes, continue to submit a biobib document as part of the file until Faculty180 is launched. Once Faculty180 is launched, the biobib document will be generated as a report that will be part of the file.
 - Note: Only one biobib should be submitted with each file. If the faculty member uploads the biobib and there were changes made later on, they need to log back in and upload a revised version.

- 5. Do I still need to label the external referee letters as Ref A, Ref B, etc if they are solicited using the module in Interfolio?**
 - No. The letters will be uploaded directly to Interfolio by the external referee, so the reviewers will use the Ref ID list to match the letter to the corresponding Ref ID letter.
 - If you do not use Interfolio to solicit the letters, you can still label them before you upload them to the file.

- 6. Can I delete a section if it is not needed for that specific case?**
 - Yes, but you will need to know whether the section is part of the candidate’s requirements (personal statements, biobib, sabbatical report, etc) or an internal case section (external evaluations).
 - If the section you want to delete is part of the candidate’s requirements, you can delete it from the file only when you are creating the file if you are not allowing your faculty to access to the file.
 - For example, if the candidate did not take a sabbatical during the review period, then a sabbatical report is not needed in the file so you can delete that section when you are creating the file for that person.
 - If the section you want to delete is an internal case section, you can [delete the section](#) at any time.

- 7. How do I view a file’s status once it leaves the review step that I am part of?**
 - Go to [AP Data](#) and pull the “Interfolio File Status” report to see which workflow step the file is currently on.

Faculty

1. If I add documents to the case, can the faculty member see them if they log into the system?

- Documents are visible to the candidate if they are uploaded to the Candidate Packet section. Otherwise, they are only visible to the candidate if the department sends them an [email in the system](#) and attaches the document.

2. How do I send a candidate redacted copies of external solicitation letters?

- You will need to download a copy of each letter (either from Interfolio or outside the system depending on how you solicited the letters), redact the personal information, and create a new bundle with all of the redacted letters.
- You can then upload the new bundle to the file and share them with the candidate. Make sure to label the redacted version clearly!

3. Can I rename or delete a document that the candidate has uploaded?

- No, if the candidate uploads a document, they are the only ones who can remove the document from their file or change the name of the document.
- If changes need to be made to the document, the candidate needs to login and delete the previous version of the document (common with the biobib).

4. My faculty member is seeing this message when they login to Interfolio, even though I created a case for them:

Are you a member of a committee trying to log in to Interfolio?

If so, we are having trouble finding your account in our system. Please check with your school administrator or the committee chair for help.

If you are trying to access Interfolio's Dossier services, click [here](#).

- The case was created with the incorrect email address. Please contact Brandy Cheshire to find out their correct email address. The file that was already created will need to be closed.

5. How do I know when the faculty have completed the certification in their file?

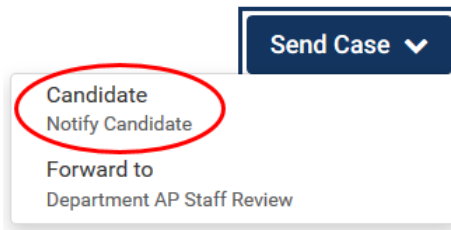
- If it is done correctly, the certification will become a hyperlink when you look at their case materials in Interfolio (see image below).

The screenshot shows a user interface for a certification form. At the top, it says "Certification 1-B" with a green "Unlocked" button and a "Lock" button. Below this is a message: "Please do not complete the certification 1-B form until you are instructed to do so by your department." There is an "Add File" button. Under "Materials", it says "No files have been submitted." At the bottom, there is a red circle around a link: "Cert 1-B: Certification of Departmental Committee Report Access" with subtext "Form | 4 Questions, 3 responses". To the right, it says "Submitted by Candidate, Feb 11, 2019 at 2:00 PM".

6. My faculty member cannot see the “Your Packets” section when they login in order to see their file.

There are a few items that you can check to find out the cause:

- The candidate was not notified before the file was moved forward to the Department AP Staff Review step. The notification provides the candidate access to their file and it cannot happen later on if you miss it after file setup.



- You can also check the activity log to confirm if the notification was sent.

Sep 20, 2018 at 11:13 AM

Jenna Lucius (jlucius@ucsd.edu) notified Jay Gatsby of the review.

- During file setup, you marked “no” to this question. This cannot be changed once the case is open, so you will need to close this file and start over with a new one if you plan on having this person login at any time during the review process to see or work on their file.

Will the candidate be involved in this evaluation?

Yes No

Choose “Yes” if the candidate will submit their own materials and you would like to communicate with them during the evaluation period. Note: This setting cannot be changed after this step.

- The incorrect email address was used during the case creation. The email address used to create the file must be the official UCSD email address that is associated with their SSO account, not the common email address that some users have.