

## Interfolio RPT Peer References Instructions for Faculty Coordinators

### **Overview:**

To complete the Peer Reference process, you will use RPT to solicit evaluations from proposed references using a templated questionnaire and customized message (which will include evaluator instructions along with the candidate's CV). RPT will track the received responses and will automatically send reminders based on the deadline that you have identified. The Peer Reference process is finished once you have received 6 completed evaluations. Then you will upload all remaining dossier documents into RPT before submitting the case to OAA.

### **Before you start, make sure you have:**

- Access to the candidate's case in Interfolio RPT
  - Reach out to your department resource in OAA if you do not see the case in your queue
- A copy of the candidate's CV downloaded from FEDS
- The [Peer Reference Questionnaire fillable PDF](#) downloaded from the OAA website
- The [Evaluator Instructions](#) downloaded from the OAA website
- The candidate's [Peer Reference Submission](#) Form including full names and email addresses for all References
  - Refer to the [Peer References Guidelines](#) when you vet the provided names against the required reference criteria
- Customized and saved the templated [Peer Reference Solicitation Message](#) with candidate's and department Chair's (or Division Chief's) information included in the appropriate sections.

### **Step one—the Set-Up:**

1. **Enter candidate info. in Peer Reference Questionnaire** (fillable PDF):
  - Candidate name and degree
  - Action type
  - Proposed rank
  - Area of Concentration (*please be as succinct as possible, no more than 70-80 characters*)
  - Primary Practice Site (field/specialty plus location - e.g. Pulmonary Ambulation at HUP)
2. **Upload documents to Interfolio RPT Case** (Peer Reference materials only. NOT full dossier)

- Candidate’s FEDS CV (and Grants pages if applicable) – in Candidate section

Case Materials Case Details 3

Search case materials by title

Expand All Collapse All Download Share Settings Move

**Candidate Packet**  
Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

▼ Candidate Documents **Unlocked**

C.V. 1 required Add File

No files have been submitted.

Personal or Research Statement 1 required Add File

No files have been submitted.

- Peer Reference Questionnaire *w/completed candidate info.* – in Department Materials section
- [Evaluator Instructions](#) – in Department Materials section

▼ Department Materials Edit Add File

Required Documents:

- Reference Letters (1 Minimum) - upload to External Evaluations Section
- EEO Report
- Academic Plan
- Teaching Report
- Department Letter

Optional Documents:

- Clinical Performance Evaluation
- Letter to Request Change in Title and Status

Forms:

- Request Form
- Department Vote

**Step two—Prepare & Send Solicitation:**

1. Scroll to the ‘External Evaluations’ section of the case and select ‘Request Evaluation’

review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

PSCS Materials Edit Add File

External Evaluations Request Evaluation Add File

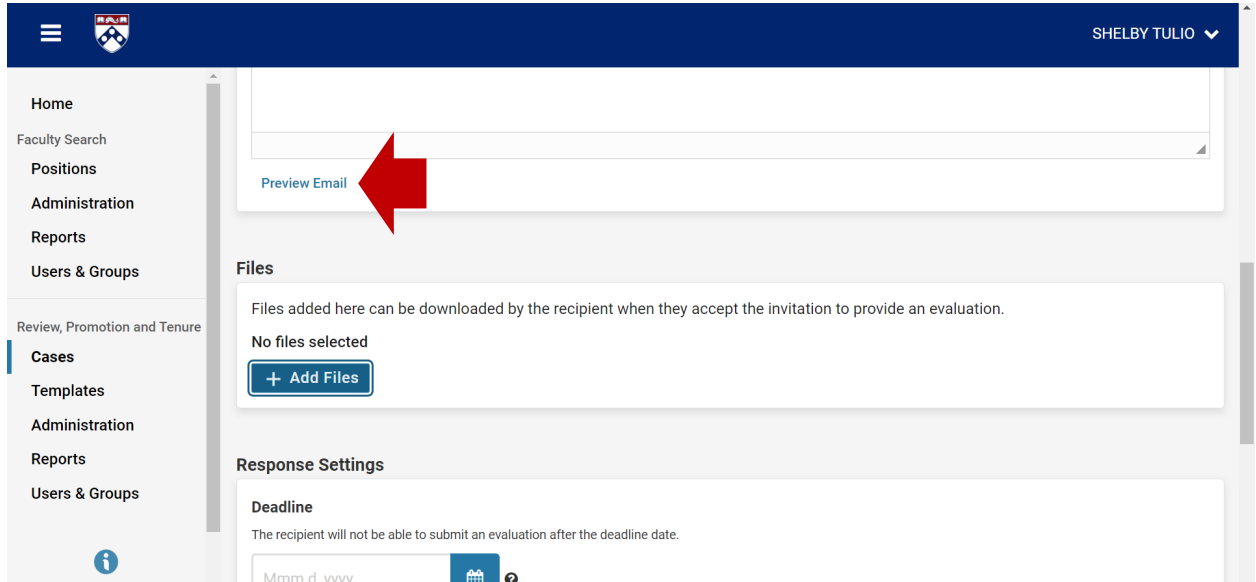
- In the 'External Evaluator Information' section, add in the name and email address for *each reference*. Select the 'Add Another Evaluator' button until all references have been included

### 3. Create Solicitation Message

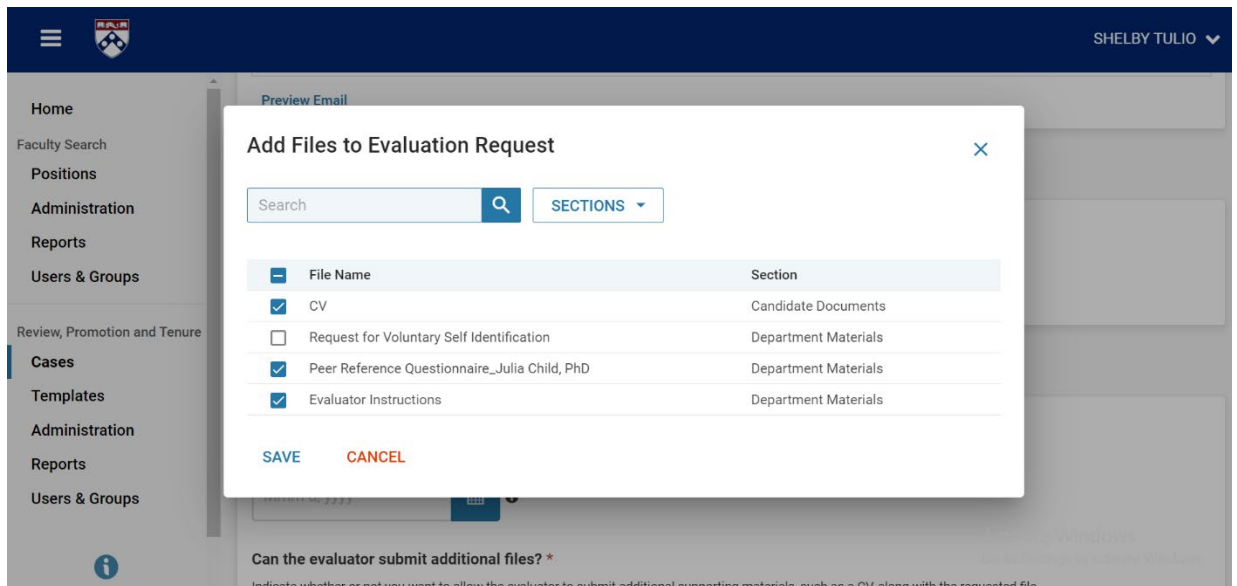
In the 'Message to Evaluator' section:

- The 'From Name' box will be prepopulated with 'University of Pennsylvania', so you **must change it to** 'PSOM + your DEPARTMENT NAME + Faculty Affairs' (e.g., PSOM Psychiatry Faculty Affairs, PSOM Department of Medicine Faculty Affairs)
    - The 'Reply-to' box will be prepopulated, so you will need to confirm that *your* email address (the FC's) is listed
    - In 'Subject' enter: Request to evaluate Dr. CANDIDATE'S NAME
  - Copy & paste customized\* [Solicitation Message](#) in 'Message to the Evaluator'
- \*If you have not already done so, you MUST enter candidate's name & PPS, proposed action & rank, as well as name of Department Chair/Division Chief to customize the solicitation

4. Select 'Preview email' and doublecheck that all fields have been completed correctly



5. Under the 'Files' section, select 'Add Files' and then select the CV, Evaluator Instructions, and the Peer Reference Questionnaire which should all have previously been added to the RPT case in the appropriate sections (see above)



6. Under 'Response Settings,' select a deadline for the evaluations. We suggest a deadline of one month out in order to give reviewers enough time to complete the request.
  - Note: RPT will automatically send reminders to all reviewers who have accepted the request before the deadline
7. Keep the default selections for the other response settings
  - Selected response for 'Can the evaluator submit additional files?' should remain 'No'
  - Selected response for the 'Access' dropdown should remain 'Administrators & Entire Committee'

The screenshot shows the 'Response Settings' form. On the left is a navigation menu with categories like 'Home', 'Faculty Search', 'Positions', 'Administration', 'Reports', 'Users & Groups', 'Review, Promotion and Tenure', 'Cases', 'Templates', 'Administration', 'Reports', and 'Users & Groups'. The 'Cases' category is currently selected. The main content area is titled 'Response Settings' and contains three sections: 'Deadline' with a date picker set to 'Jun 1, 2023'; 'Can the evaluator submit additional files? \*' with radio buttons for 'Yes' and 'No', where 'No' is selected; and 'Access \*' with a dropdown menu set to 'Administrators & Entire Committee'.

8. Then hit 'Send Request'

This screenshot is identical to the one above, showing the 'Response Settings' form. A large red arrow points from the bottom center of the form area down to the 'Send Request' button, which is a blue button with a white envelope icon. To the right of the 'Send Request' button is a red 'Cancel' button. The rest of the form and navigation menu are the same as in the previous screenshot.

### Step three—Tracking Responses:

- Interfolio RPT keeps track of all requests sent: when they were sent, the status of the request (accepted or declined), and the date the completed Questionnaire was received

The screenshot shows the Interfolio RPT interface for Shelby Tulio. The main content area displays a table of external evaluations under the heading 'External Evaluations'. The table has three columns: Title, Details, and Actions. The evaluations are listed as follows:

Title	Details	Actions
<input type="checkbox"/> Evaluation from Jane Waltman	Accepted Apr 12, 2023	<a href="#">Edit</a>
<input type="checkbox"/> Evaluation from Rorie Leahy	Submitted by Rorie Leahy Apr 12, 2023	<a href="#">Edit</a>
<input type="checkbox"/> Evaluation from Jane Waltman	Requested Apr 12, 2023	<a href="#">Edit</a>
<input type="checkbox"/> Evaluation from Shelby Tulio	Requested Apr 28, 2023	<a href="#">Edit</a>
<input type="checkbox"/> Evaluation from Rorie Leahy	Submitted by Rorie Leahy Apr 28, 2023	<a href="#">Edit</a>
<input type="checkbox"/> Evaluation from Shelby Tulio	Requested May 1, 2023	<a href="#">Edit</a>

At the top of the table, there are buttons for 'Request Evaluation' and 'Add File'. The interface also includes a sidebar with navigation options and a top header with user information and utility buttons like 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move'.

- Interfolio will also send notification emails to the RPT Committee Manager who requested the evaluations as Questionnaires are received to help with tracking
- For pending requests, you can 'Edit & Resend Request', which will allow you to change the deadline and manually send a reminder

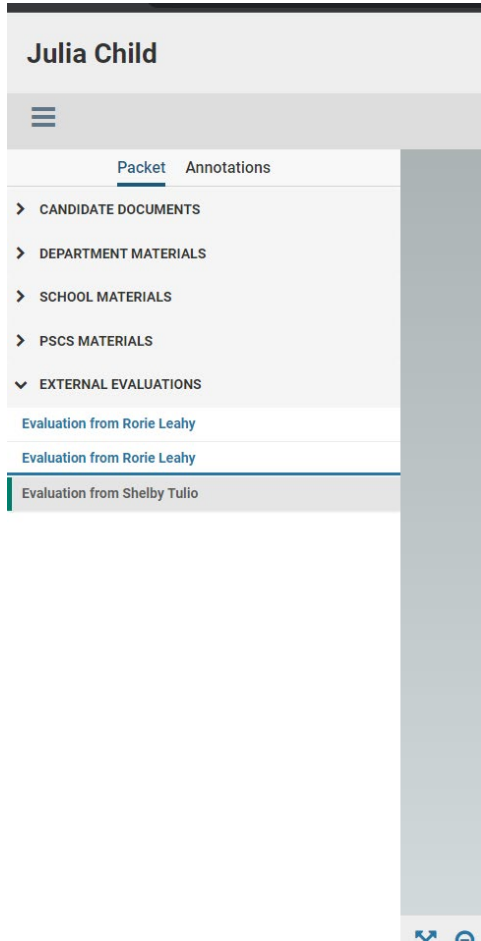
This screenshot is similar to the previous one but highlights the 'Edit & Resend Request' option. A red arrow points to the 'Edit' button for the 'Requested May 1, 2023' evaluation. A dropdown menu is open, showing the following options:

- Edit Settings
- Edit & Resend Request
- Cancel Request

The 'Edit & Resend Request' option is highlighted in grey. The rest of the interface, including the table and sidebar, is identical to the previous screenshot.

**Step four—Finalizing the peer references:**

- Interfolio RPT automatically attaches all received submissions to the candidate’s dossier



- The peer reference process is complete once **6 evaluations** have been received
- Candidate’s case should be submitted to the School once all dossier components have been uploaded into RPT