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.

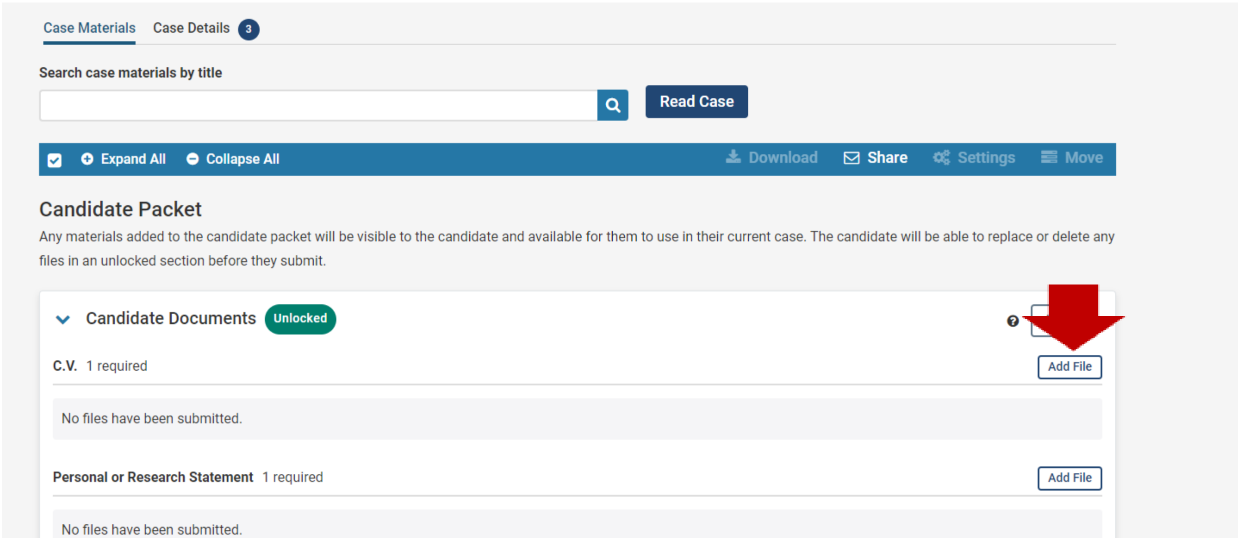
Before you start, make sure you have:

- 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.

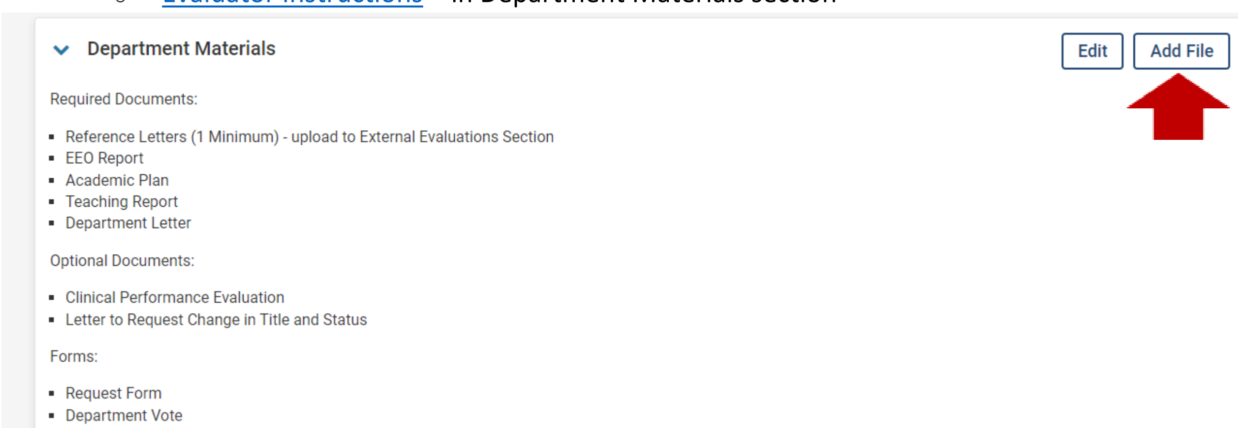
Step one—the Set-Up:

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

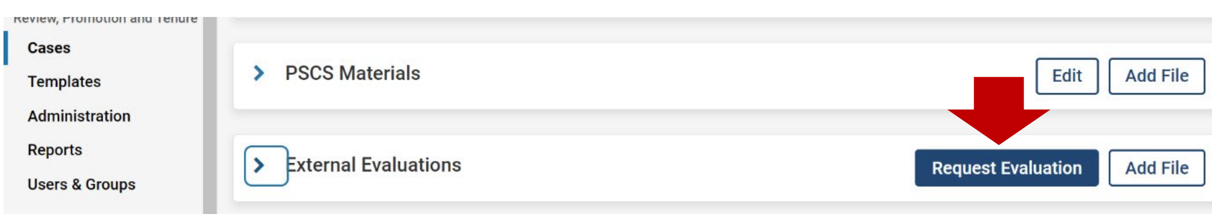


- Peer Reference Questionnaire *w/completed candidate info.* – in Department Materials section
- [Evaluator Instructions](#) – in Department Materials section

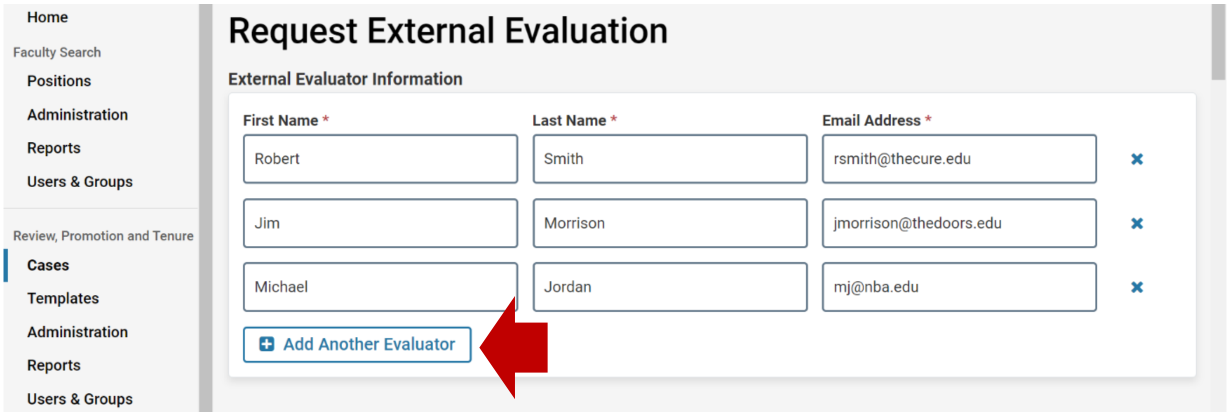


Step two—Prepare & Send Solicitation:

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



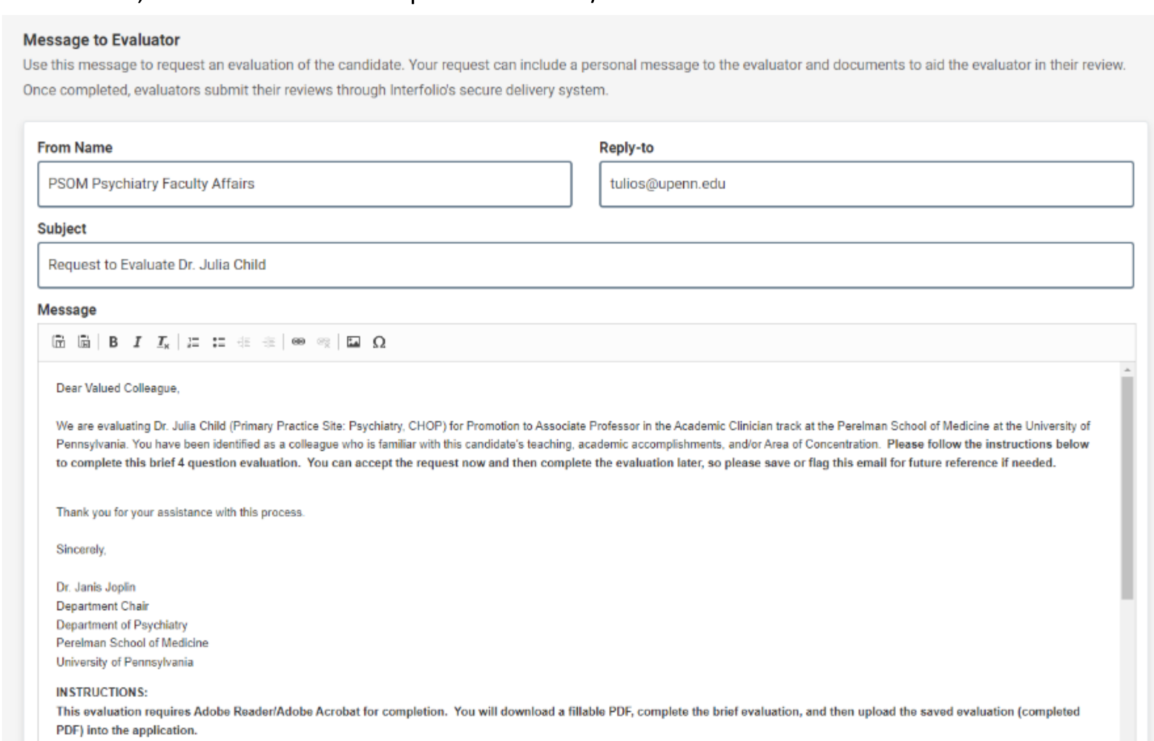
2. In the ‘External Evaluator Information’ section, add in the name and email address for *each reference*. Select the ‘Add Another Evaluator’ button until all references have been included



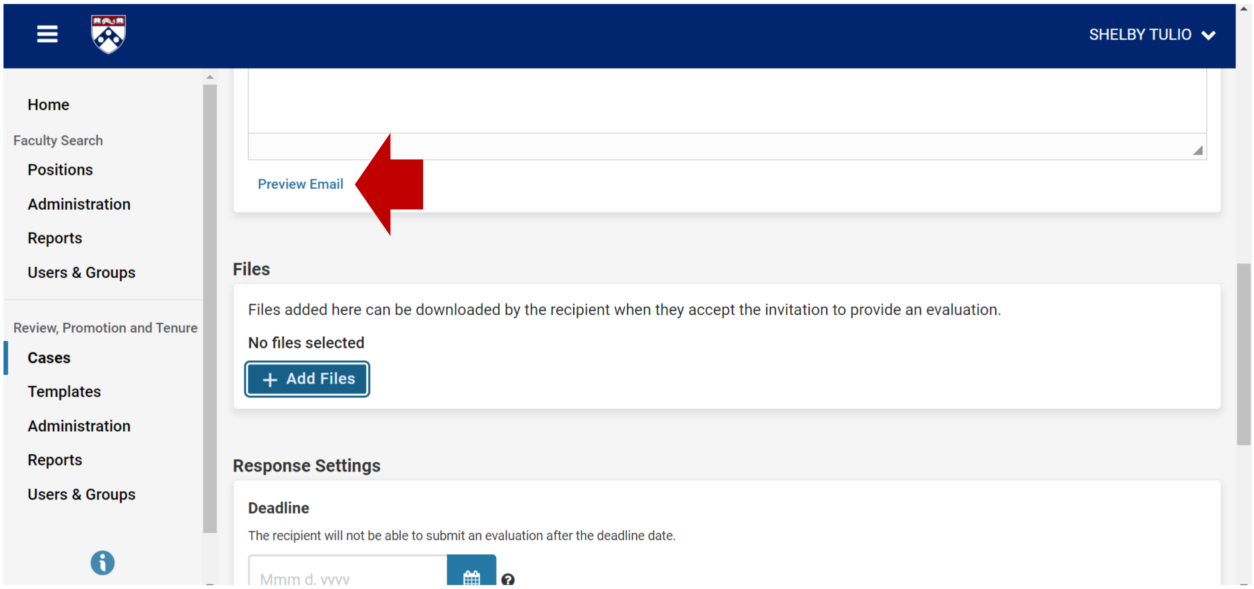
3. **<u>Create Solicitation Message</u>**
   In the ‘Message to Evaluator’ section:
   - The ‘From Name’ box will be prepopulated with ‘University of Pennsylvania’, so you **must change it to** ‘PSOM + your DEPARTMENT NAME + Faculty Affairs’ (e.g., PSOM Psychiatry Faculty Affairs, PSOM Department of 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’

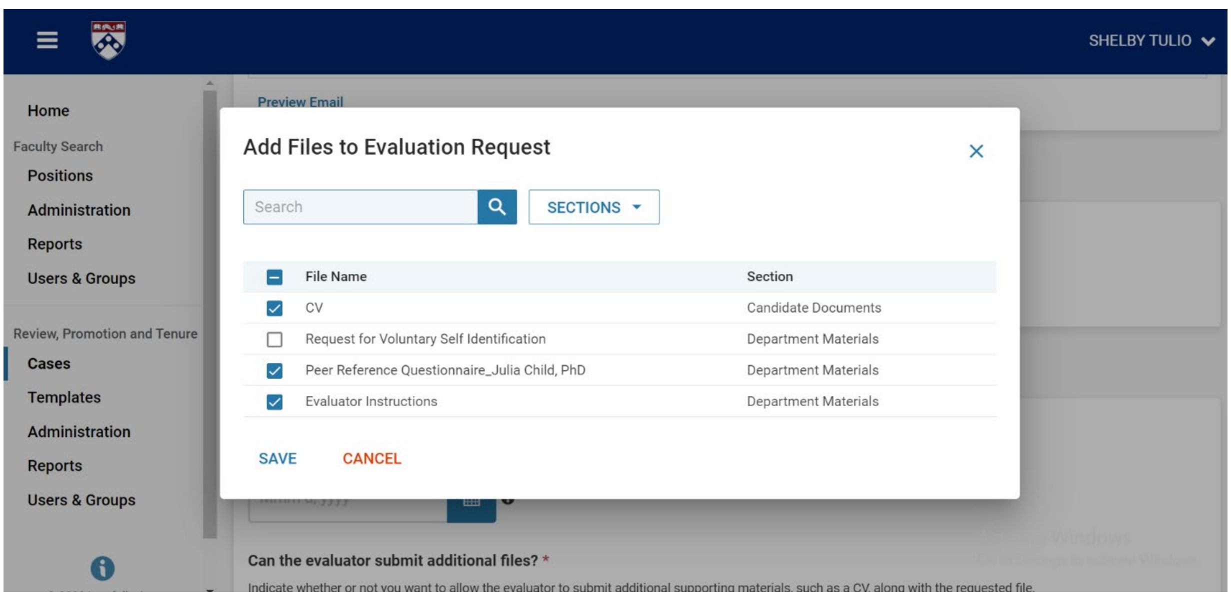
  *If you have not already done so, you MUST enter candidate’s name & PPS, proposed action & rank, as well as name of Department Chair/Division Chief to customize the solicitation



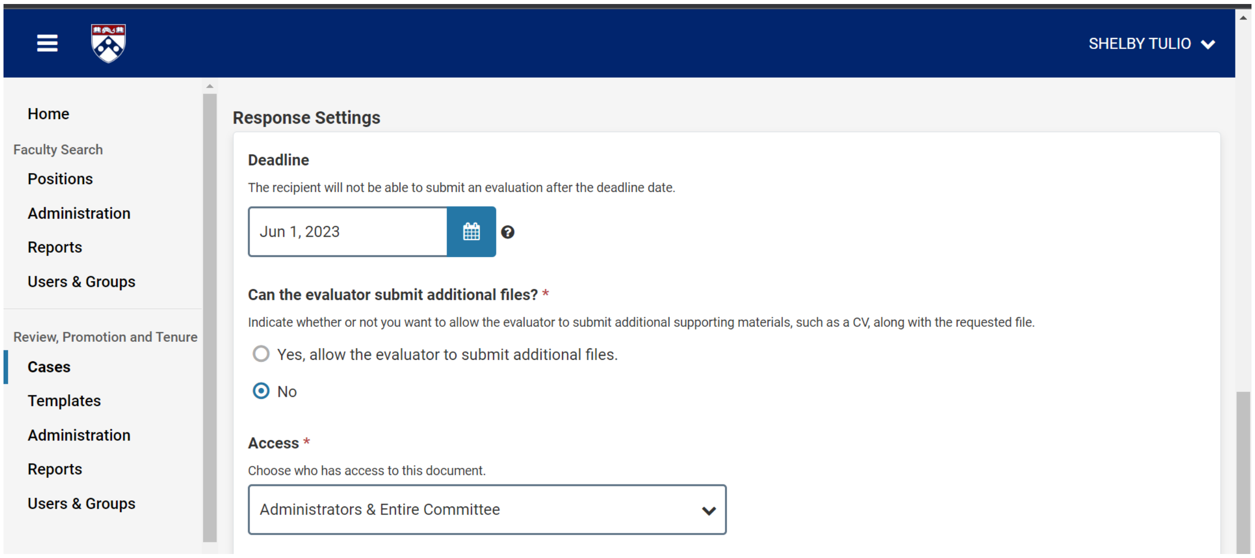
4. Select 'Preview email' and doublecheck that all fields have been completed correctly



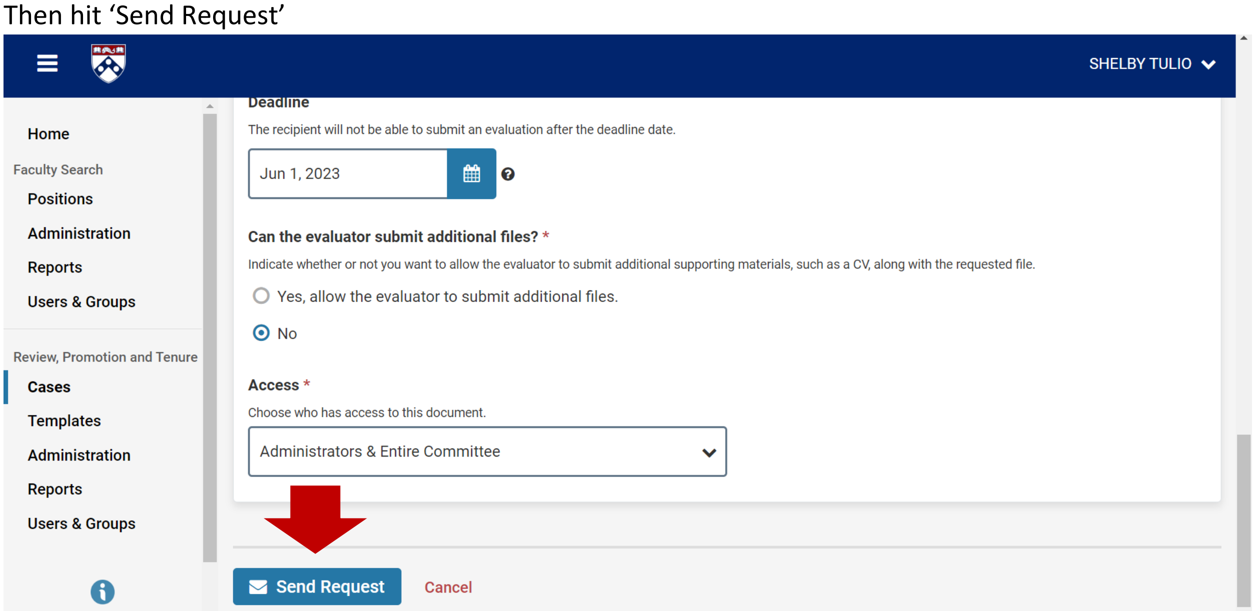
5. Under the 'Files' section, select 'Add Files' and then select the CV, Evaluator Instructions, and the Peer Reference Questionnaire which should all have previously been added to the RPT case in the appropriate sections (see above)



6. Under 'Response Settings,' select a deadline for the evaluations. We suggest a deadline of <u>one month out</u> 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'

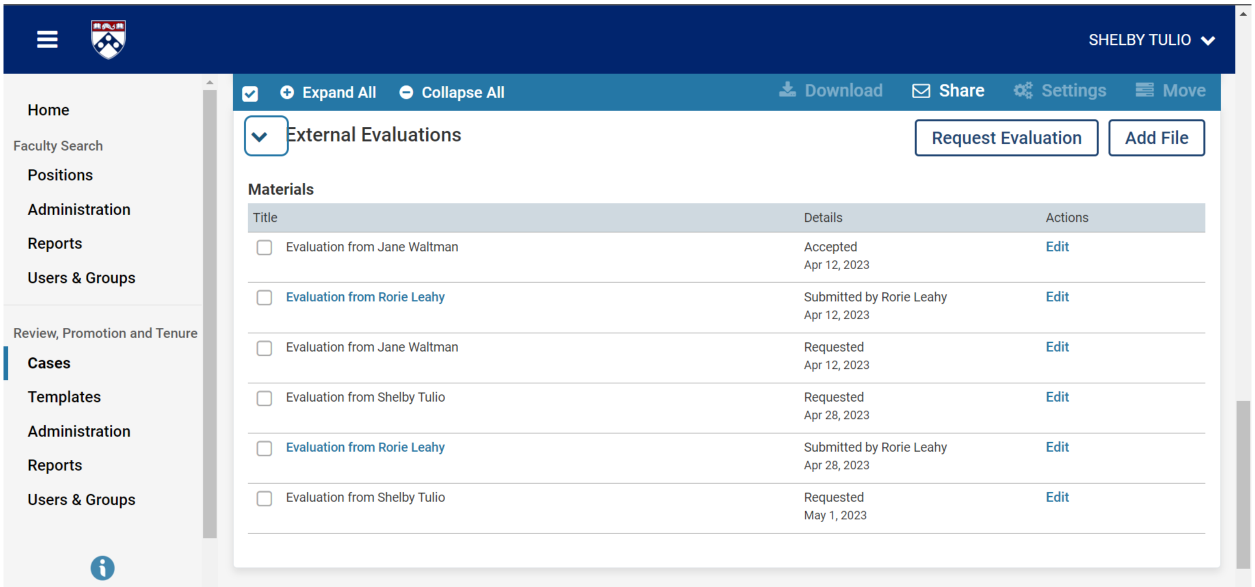


8. Then hit 'Send Request'

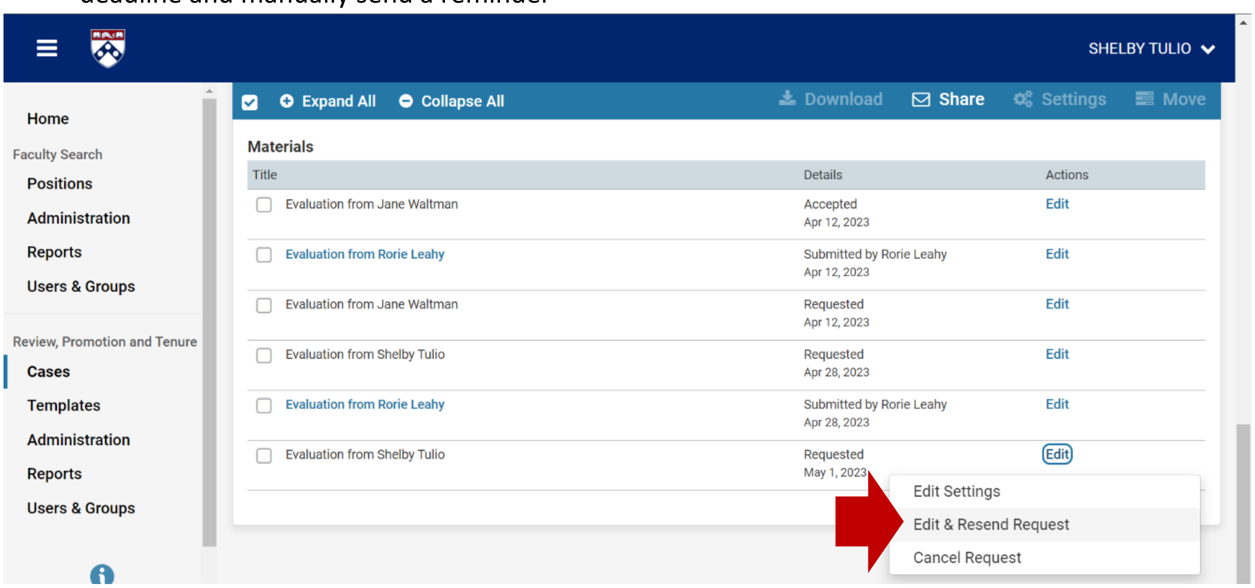


Step three—Tracking Responses:

- 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

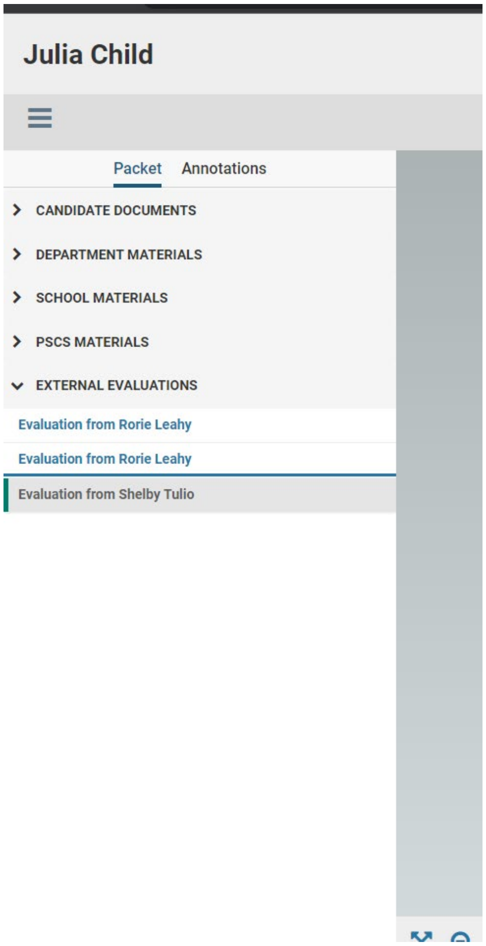


- Interfolio will also send notification emails to the RPT Committee Manager who requested the evaluations as Questionnaires are received to help with tracking
- For pending requests, you can ‘Edit & Resend Request’, which will allow you to change the deadline and manually send a reminder



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