


Request an External Evaluation through an RPT Case/Add an External Evaluation to the Case of a Candidate

When creating a template or case an administrator can elect to include an External Evaluation section through which evaluations can be requested or added to the case packet.

Administrators and Committee Managers can then request evaluations from scholars who are external to the committee (or even the institution) to help them evaluate a candidate.

There are two ways to add external evaluations to a case:

1. Administrators and Committee Managers can upload an evaluation they have on their computer to the candidate's case,
2. Or Administrators and Committee Managers can request evaluations from one or more external evaluators through our program by email. External evaluators will receive the email with instructions for submitting the document and can upload it directly to Interfolio without having an Interfolio account. We will send external evaluators automatic reminders 7 days & 1 day before the set deadline. **Please note that this is a hard deadline.** It is even possible to request evaluations from multiple potential evaluators at the same time, so you only have to type one email message for all requests.

 Only Administrators and Committee Managers can add or request external evaluations. The buttons and procedures explained below will not appear on the case page when viewed by a committee member who is not also an Administrator or Committee Manager for the case.

Sharing Documents:

Documents added to the External Evaluations section using the **Add File** button, or evaluations requested through the External Evaluation section using the **Request Evaluation** button are uploaded as *confidential documents* that cannot be shared with the candidate, even when they are moved to another part of the packet.

When an administrative user or Committee Manager shares documents with the candidate using our [document sharing feature](#), it is not possible to include confidential documents, including external evaluations, among the materials being shared with the candidate.

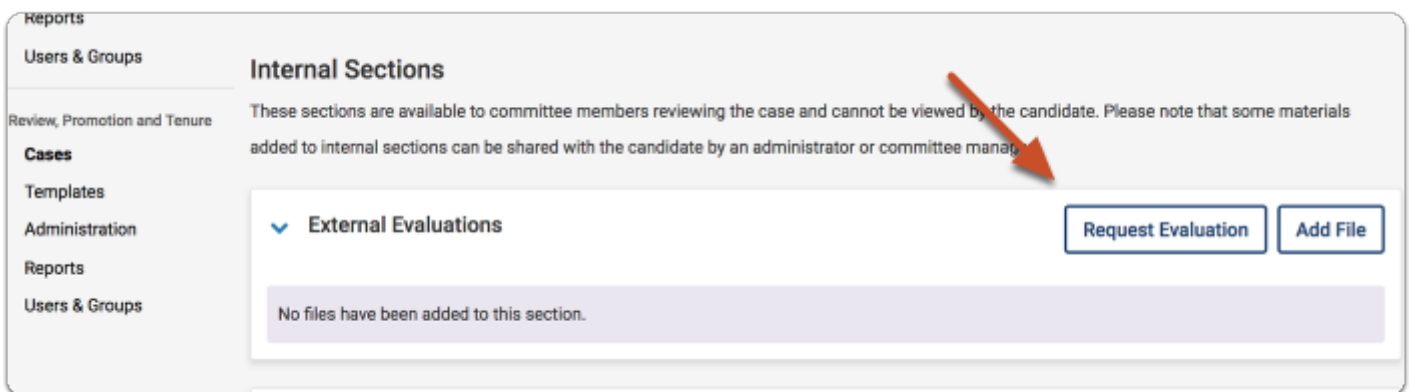
It IS possible however, to share non-confidential documents, even when those documents have been moved into the External Evaluations section.

For sharing files, what matters is whether they are uploaded as confidential documents. They will remain confidential, no matter where they appear in the packet. Likewise, non-confidential materials will remain non-confidential no matter where they appear in the packet.

To request one or more external evaluations through the program:

1. On the case page of the candidate, scroll down to the External Evaluations section and click "Request Evaluation"

This will open a window where you can configure and send an email request for an external evaluation.



2. Enter the name and email of the external evaluator(s) on the Request External Evaluation page

i Note that you can click **Add Another Evaluator** to use this form to request letters from multiple evaluators.

Awesome P&T University > Cases > Julie Lundy >

Request External Evaluation

External Evaluator Information

First Name *	Last Name *	Email Address *
Blotorius	Gwartmenton	blothar.gwar@gmail.com

+ Add Another Evaluator

3. Enter the email message to the 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 Interfolio's secure delivery system.

Note that you can set the **From Name** and **Reply-to** addresses.

Make sure to give your email request a meaningful **Subject** line.

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 Interfolio's secure delivery system.

From Name
Interfolio Alpha University

Reply-to
intf_alpha_demo@interfolio.com

Subject
Evaluation Request

Message

body p

[Preview Email](#)

4. Attach files to the request email if necessary

You can attach files from the case that may be useful for the evaluator. The files you add here can be downloaded by the recipient when they accept the invitation to write an evaluation.

4.1. Click "Add Files"

Click **Add Files** button in the **Files** section of the request form.

Files

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

There are no files added in this request.

[+ Add Files](#)

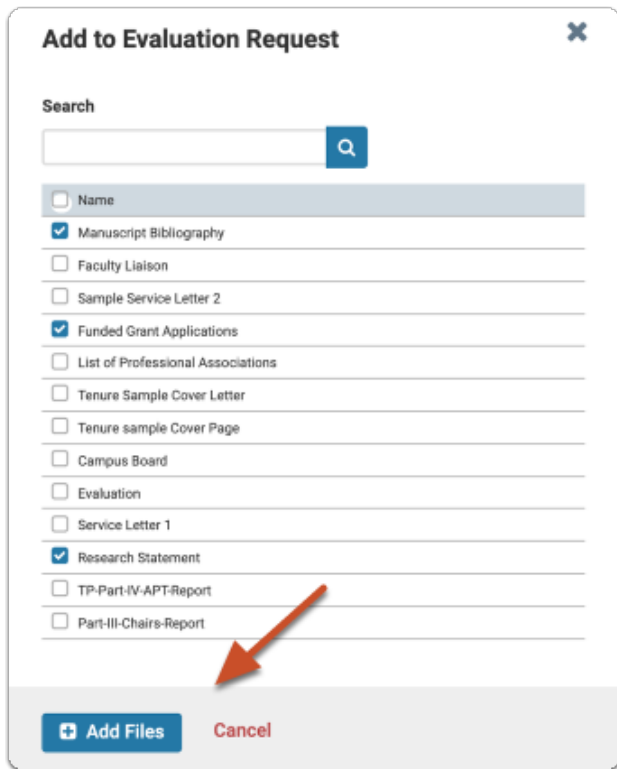
4.2. Select files to add to the request

Select files from the list in the **Add to Evaluation Request** window and click **Add Files**.


Add to Evaluation Request ✕

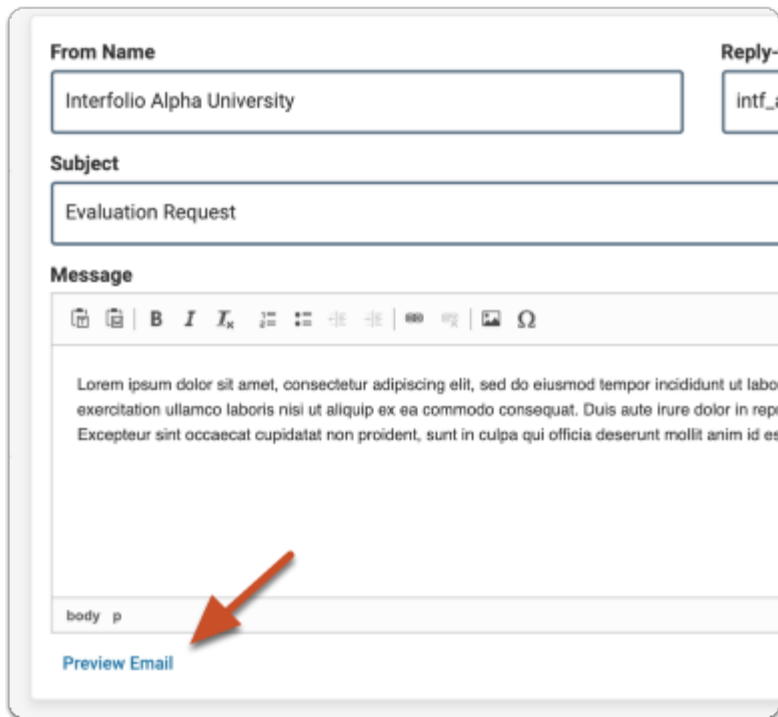
Search

- Name
- Manuscript Bibliography
- Faculty Liaison
- Sample Service Letter 2
- Funded Grant Applications
- List of Professional Associations
- Tenure Sample Cover Letter
- Tenure sample Cover Page
- Campus Board
- Evaluation
- Service Letter 1
- Research Statement
- TP-Part-IV-APT-Report
- Part-III-Chairs-Report

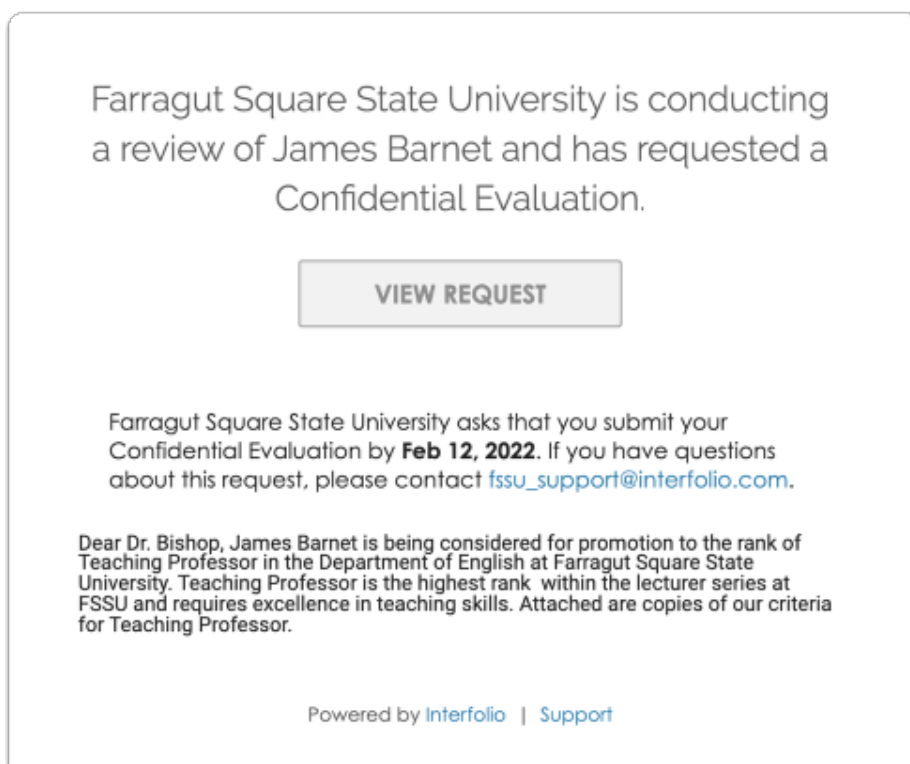


5. Click "Preview Email" to see how the request email will appear to the external evaluator

 If your institution has branded Interfolio with custom colors and added a logo, these will appear in the email sent to the evaluator.




An email that looks like the image below will be sent to the evaluator with request details:

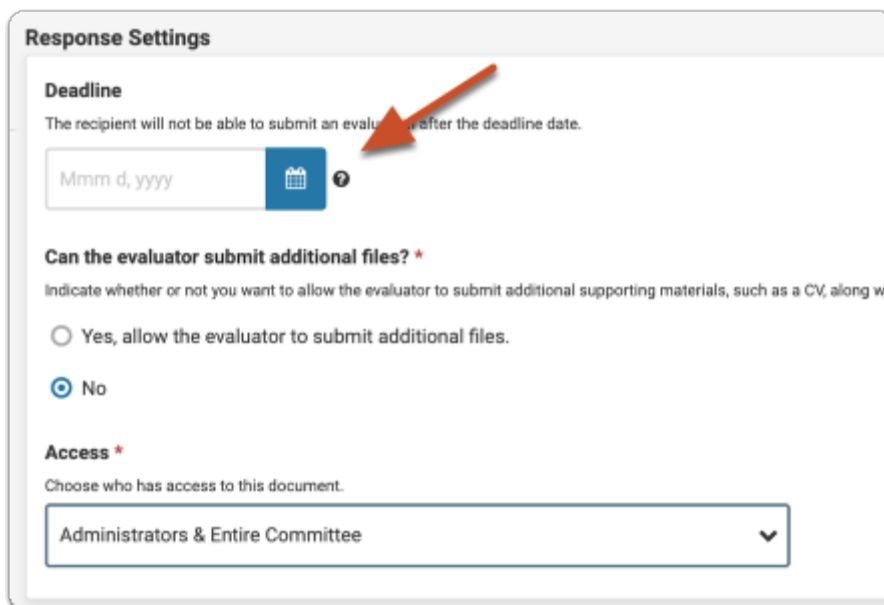


6. Set Response Settings

6.1. Select a Deadline



Click the **calendar icon** to select a **deadline** for for the request.

 This is a hard deadline, meaning the recipient will not be able to submit an evaluation after the deadline date.



Response Settings

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


Mmm d, 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 evaluation.

Yes, allow the evaluator to submit additional files.

No

Access *
Choose who has access to this document.

Administrators & Entire Committee 



6.2. Indicate whether or not the evaluator can submit additional files


If the box labeled **Can the evaluator submit additional files?** is checked, the evaluator will be presented with the option to add up to 10 additional files.

See here for more information on how to [Allow Evaluators to Add Additional Files to External Evaluations](#).

Response Settings

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

Mmm d, 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 request.

Yes, allow the evaluator to submit additional files.

No

Access *
Choose who has access to this document.

Administrators & Entire Committee 

6.3. Choose who can access the request and the evaluation once it is uploaded

Click the dropdown menu to select who can view the request while it is pending, and can access the evaluation when it comes in.

Access *
Choose who has access to this document.

Administrators & Entire Committee 

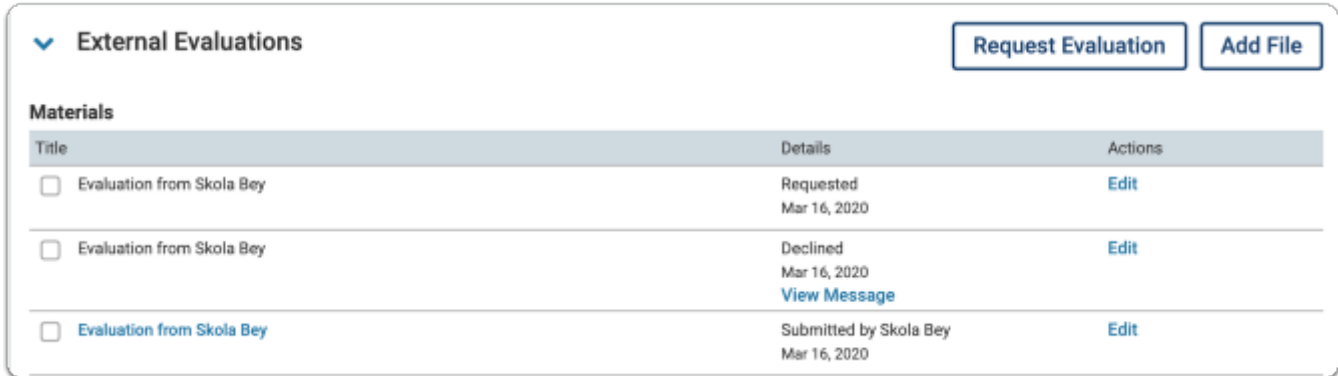
The default **Access** level is **Administrators & Entire Committee**. Click to open the **Access** dropdown to change this to **Administrators & Committee Managers** and **Administrators Only**.

Access *
Choose who has access to this document.

- Administrators & Entire Committee
- Administrators & Committee Managers
- Administrators Only

7. Click "Send Request"

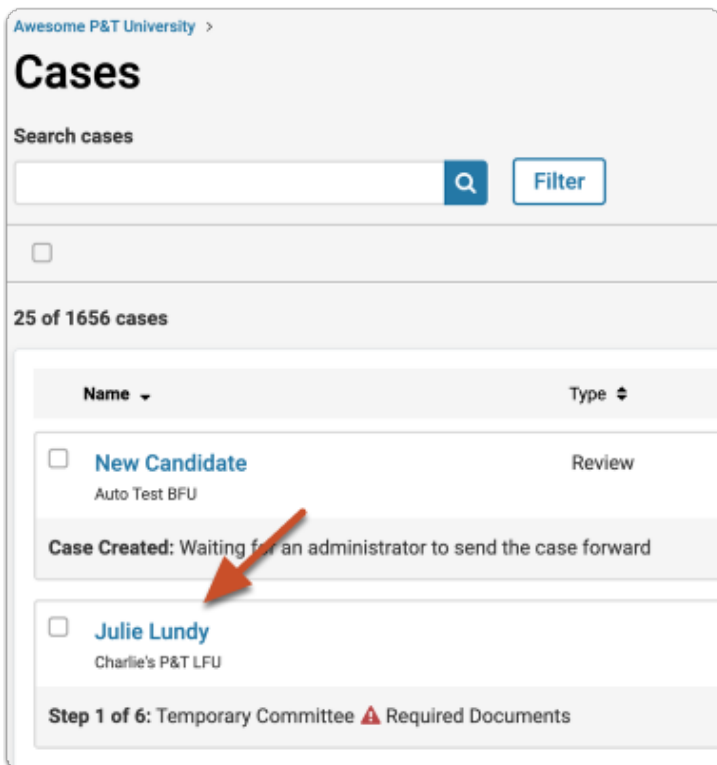
The request (and the evaluation once it comes in) will appear in the **External Evaluations** section.



External Evaluations		Request Evaluation	Add File
Materials			
Title	Details	Actions	
<input type="checkbox"/> Evaluation from Skola Bey	Requested Mar 16, 2020	Edit	
<input type="checkbox"/> Evaluation from Skola Bey	Declined Mar 16, 2020 View Message	Edit	
<input type="checkbox"/> Evaluation from Skola Bey	Submitted by Skola Bey Mar 16, 2020	Edit	

To upload an external evaluation to a case:

1. Navigate to the case by clicking the candidate's name in your list of cases



Awesome P&T University >

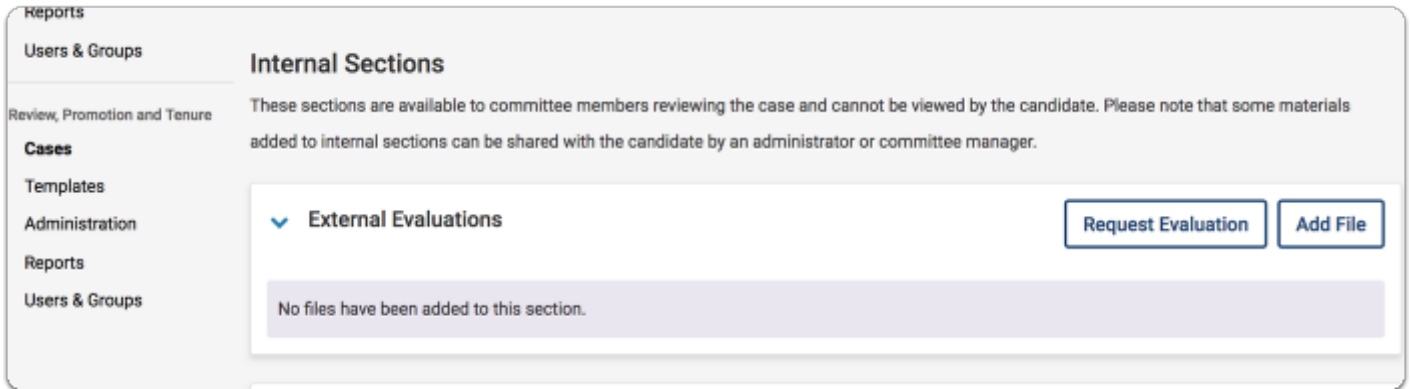
Cases

Search cases

25 of 1656 cases

Name	Type
<input type="checkbox"/> New Candidate Auto Test BFU	Review
Case Created: Waiting for an administrator to send the case forward	
<input type="checkbox"/> Julie Lundy Charlie's P&T LFU	Temporary Committee ▲ Required Documents

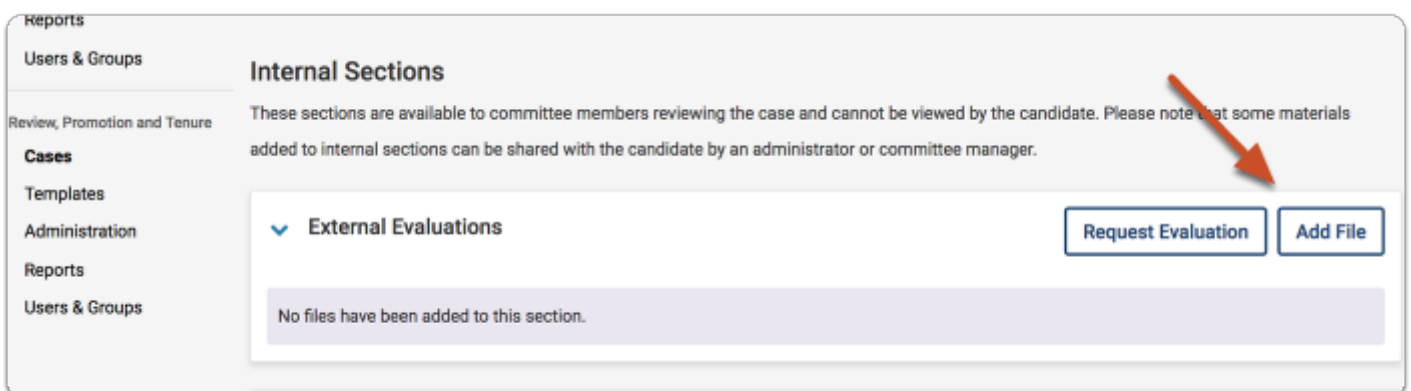
2. On the case page of the candidate, scroll down to the External Evaluations section (located in the internal sections of the packet)



3. Click "Add File" to upload an external evaluation

External evaluations uploaded this way will appear in the External Evaluations section along with the name of the uploader and the date the document was added.

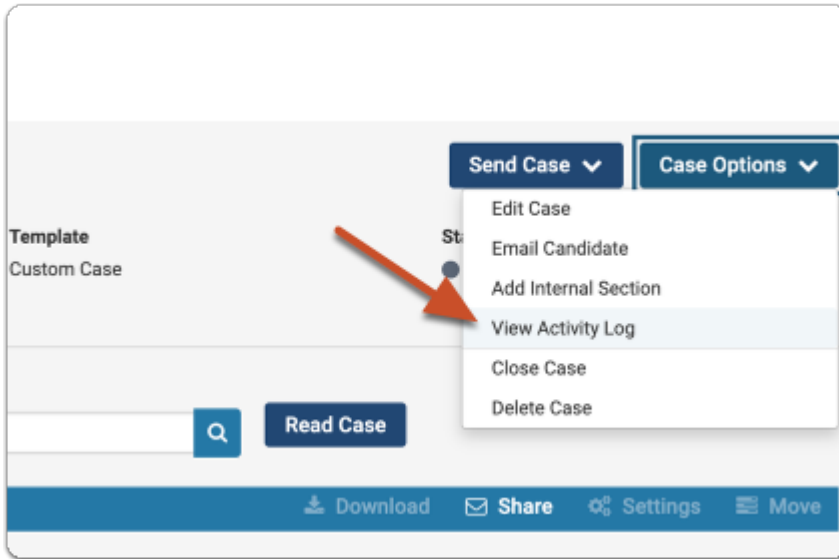
! Documents added to the External Evaluations section using the **Add File** button, or evaluations requested through the External Evaluation section using the **Request Evaluation** button are uploaded as *confidential documents* that cannot be shared with the candidate, even when they are moved to another part of the packet.



To view reporting for external evaluations:

When an administrator or committee manager uploads an external evaluation we record that in the **Activity Log** that appears in the **Case Options** menu that can be accessed at the top right of the case page.

Click "Case Options" and select "View Activity Log"



The Case Activity Log shows:

- Who requested an evaluation
- When the evaluation was requested
- When the evaluation was submitted/added
- Who uploaded the evaluation

Interfolio Alpha University > Cases > The FirstCandidate >

Case Activity for [REDACTED]

Search by event

Date	Event	Actions
Apr 1, 2020 at 4:56 PM	Interfolio Alpha University Support (intf_alpha_demo@interfolio.com) requested an external evaluation from Brenda Jamerson.	View Content