Share Case Materials with a Candidate and Allow Candidate Response/Rebuttal

Administrators and Committee Managers can share packet materials such as committee documents with the candidate, and allow or disallow a candidate response or rebuttal to the shared material.

This is useful, for example, if your organization requires that you give the candidate an opportunity to respond to a committee's decision about the candidate, or if for any reason you need the candidate to view or respond to materials added to their case packet.

When sharing case materials with the candidate, the candidate will get a notification that materials has been shared with them, and indicating if a response is allowed or required. They must log in to their account to view the shared files.

You can specify whether or not the candidate can submit a response to the shared files within the platform. When sharing files with a response allowed, you are required to set where (in which packet section) the candidate's response will appear in the packet. You also have the option to let the candidate know your reason for sharing the file, and to set a binding deadline for a response.
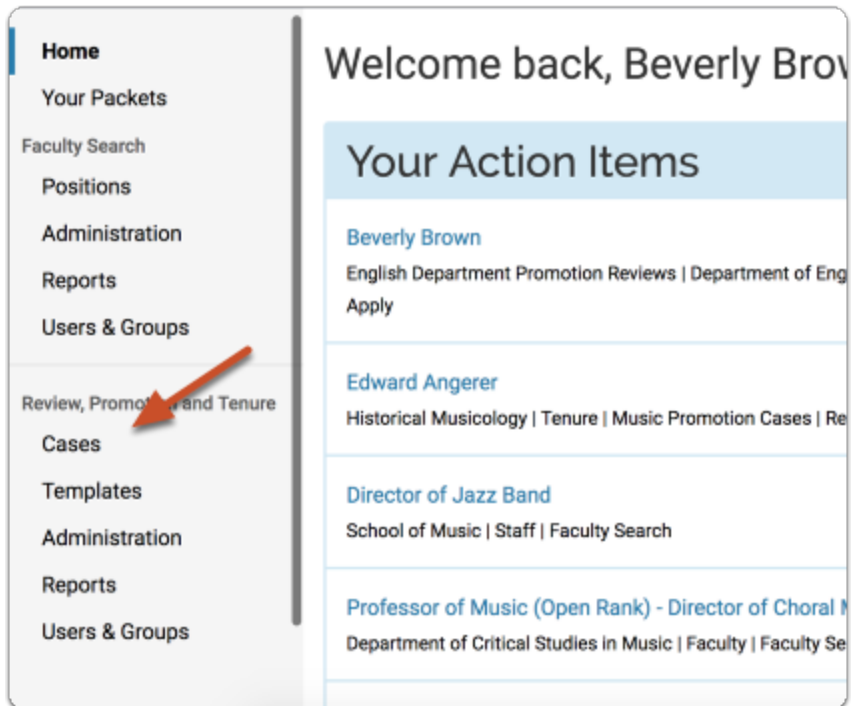
This article explains the process of sharing files with a candidate and allowing or disallowing a candidate response or rebuttal.

⚠️ **Important:** Users concerned for privacy and confidentiality issues should rest assured that:

- 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.
- *It IS possible however, to share non-confidential documents, even when those documents have been moved into the External Evaluations section.*
- It would be hard to accidentally share materials by using the "Share" feature.
- Only Administrators and Committee Managers of the current case can share files.
- As with all activity in the system, the case Activity Log will record and document when files are shared.

- During the implementation process, Project Managers will work with institutions to ensure that faculty and staff receive comprehensive training on RPT and that institutional policies are well documented and understood.

Select "Cases" from the left hand navigation menu

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

On the "Case Materials" tab, select the materials you want to share with the candidate

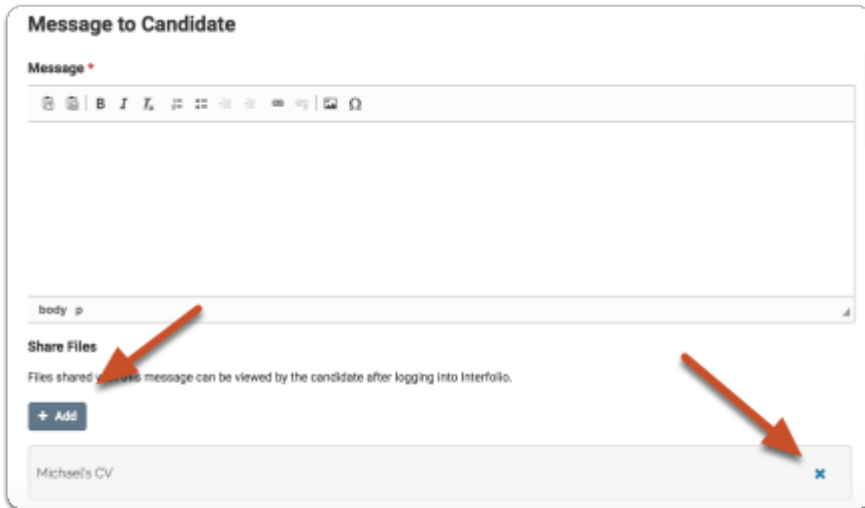# Click "Share" and select "With Candidate"
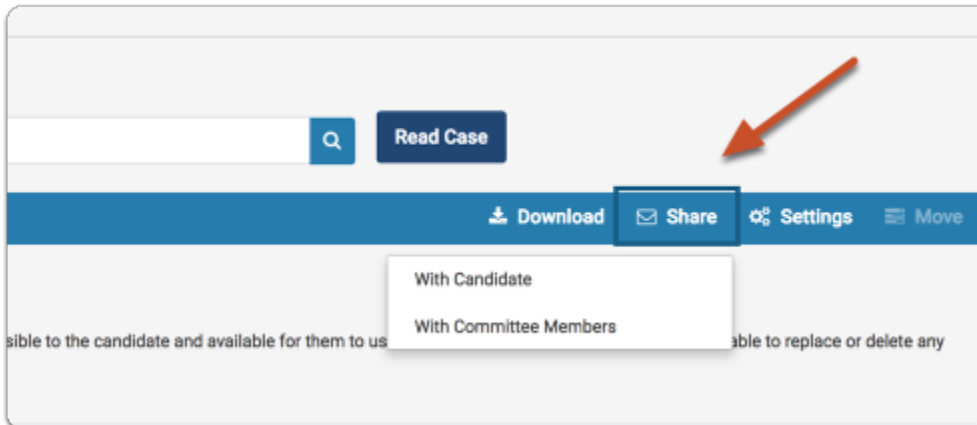
# Compose your message to the candidate
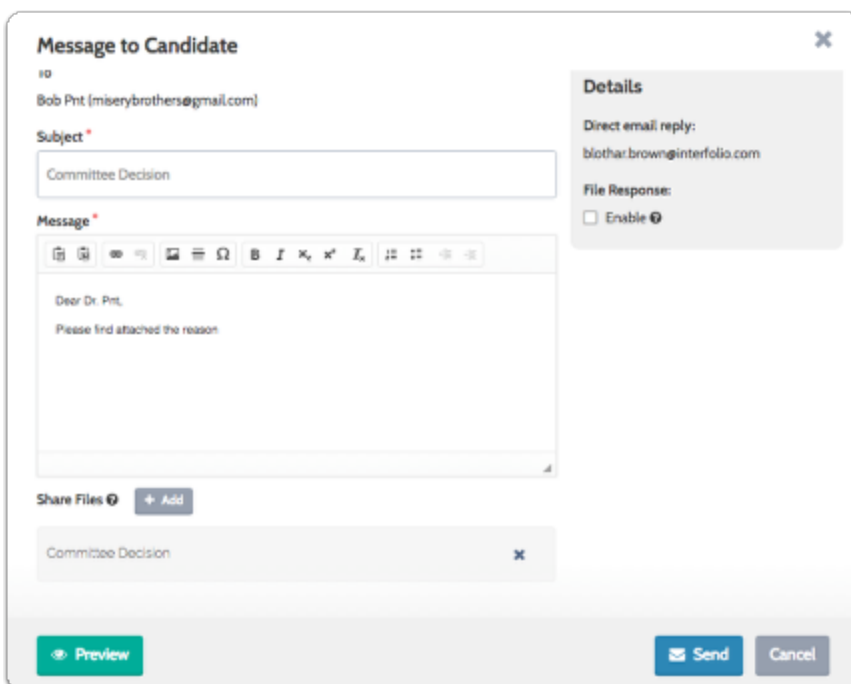
Shared files are listed at the bottom left of the window

ℹ️ Click "Add" to add more files, or the "x" to remove shared files.

⚠ No files will be directly attached to the email. The candidate will receive an email notification that files have been shared, and will need to login to their account to view the shared files.
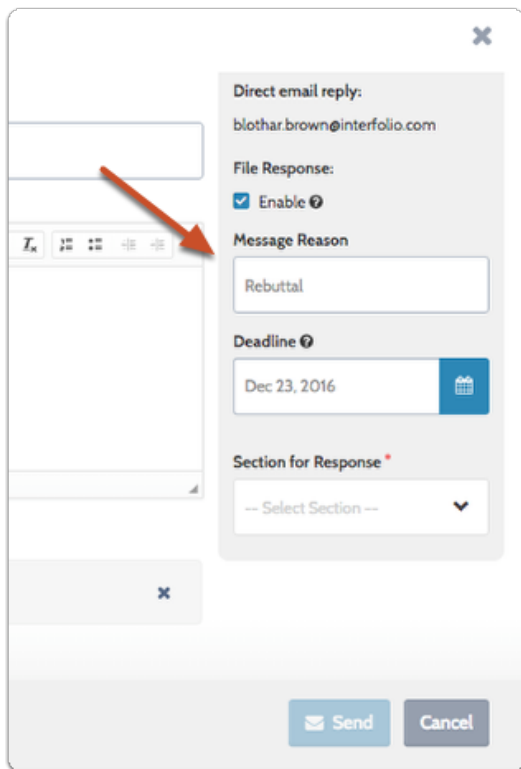
Message to Candidate

Message *

body p

Share Files

Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

Michael's CV

To allow the candidate to respond to the file, check "Enable" under "File Response" at the right of the screen

Details

Direct email reply:

blothar.brown@interfolio.com

File Response:

☐ Enable ❓

✉ Send   Cancel
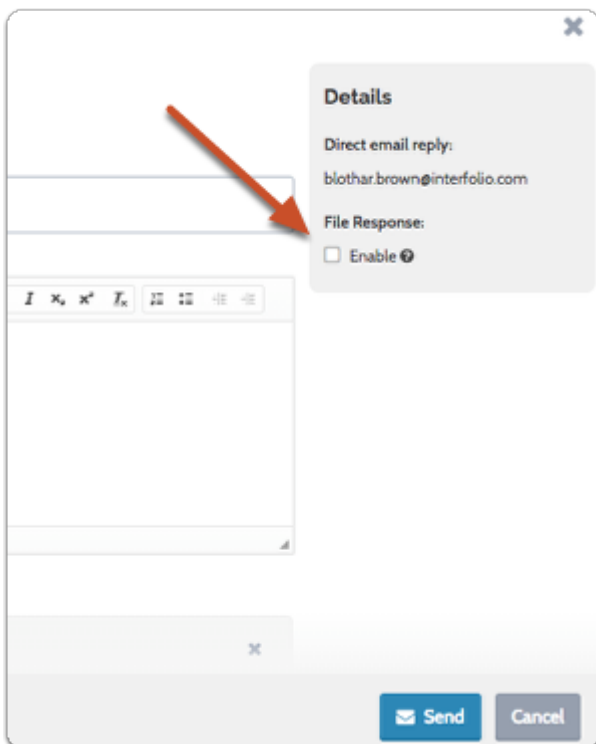
Enter a reason for the message, and set a deadline for a response

> ⊘ This is a hard deadline. Candidate's will not be able to submit a response after the deadline you set here.

Select the packet section in which the candidate response will appear once it is received

Responses to files shared with candidates can be set to post to any section when they come in.

You can preview your message and "Send" when ready

The candidate will receive an email message prompting them to log into their account and view the files

Beverly Brown has shared files with you.

VIEW FILES

You will be required to sign in to your account to view the shared files.

Dear Dr. Pnt,

Please find attached the reason...

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