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

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

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.
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.

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.
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:

Farragut Square State University is conducting a review of James Barnet and has requested a Confidential Evaluation.

**VIEW REQUEST**

Farragut Square State University asks that you submit your Confidential Evaluation by **Feb 12, 2022**. If you have questions about this request, please contact fssu_support@interfolio.com.

Dear Dr. Bishop, James Barnet is being considered for promotion to the rank of Teaching Professor in the Department of English at Farragut Square State University. Teaching Professor is the highest rank within the lecturer series at FSSU and requires excellence in teaching skills. Attached are copies of our criteria for Teaching Professor.

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6. Set Response Settings

6.1. Select a Deadline

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

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

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.
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.

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

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

To upload an external evaluation to a case:

1. Navigate to the case by clicking the candidate's name in your list of cases
2. On the case page of the candidate, scroll down to the External Evaluations section (located in the internal sections of the packet)

![Image of internal sections]

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.

![Image of internal sections]

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"

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**The Case Activity Log shows:**

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