

Annual Review Process

1. Log into Interfolio. Go to interfolio.com and click on “Log In” in the top right corner. Use the option to “Log In with Partner Institution”, enter “Stony Brook” in institution select box, and it will take you to NetID sign in page.
2. After you login with your NetID, you will see the screen below. In the left menu, choose “Cases” under the “Review, Promotion and Tenure” section.
3. When in this section, click “Create Case” button in the top right corner of the screen.

The screenshot displays the Interfolio 'Cases' interface for Stony Brook University. The user is logged in as Andrei Antonenko. The left sidebar contains navigation options under 'Review, Promotion and Tenure', with 'Cases' selected. The main content area shows a search bar and a table of cases. A blue 'CREATE CASE' button is located in the top right corner, indicated by a black arrow.

Name	Type	Template Name	Status
<input type="checkbox"/> New Candidate Sociology	Tenure	CAS TEMPLATE - Junior Faculty/Tenure Track/Promotion (ie: Asst to Assoc Professor w/Tenure)	
Case Created: Waiting for an administrator to send the case forward			
<input type="checkbox"/> Alexandre Abanov Physics and Astronomy	Sabbatical	SBU - Sabbatical Leave Request/Report Template	PROV - Sabbatical Approve...
Step 10 of 14: Provost VPC - send Provost welcome back letter/sabbatical report request to faculty member			
<input type="checkbox"/> Camille Abbruscato College of Business	Reappointment	Provost Office - Reappointment for Full-time Lecturer	PROV - Vice Provost Revie...
Step 6 of 7: Provost VPC			

4. Choose the candidate, candidate's Unit/Department, and the Type: **Review**. At the bottom of the screen, choose the template "**RSOM - Annual Review**".

Create Cases

1 Select Candidate(s) 2 Select Template 3 Review & Settings

Select Case Settings

Unit for Case(s) *
Cases can only be created in one unit.
Pharmacological Sciences

Type
Review

Select Template

Templates are based on the unit and case type chosen in the case settings.

Search

1-2 of 2 Templates

Template Information ↑	Unit ↑	Type
<input type="radio"/> Custom Case Create a unique case by customizing forms and workflow steps rather than using a template.		
<input checked="" type="radio"/> RSOM - Annual Review Annual review for faculty from the Renaissance School of Medicine	Renaissance School of Medicine	Review

5. Then choose the following option in **Settings**:

- Yes, the candidate will be involved during the case.
- No

EDIT CANDIDATE SECTIONS

Internal Case Sections
Committee Documents, External Evaluations

Case Review Steps
1 Step

EDIT STEP DUE DATES

Candidates

Candidate List

Candidate ↑	Unit ↑
Stella Tsirka Styliani-Anna.Tsirka@stonybrook.edu	Stony Brook University

Settings

Will the candidate be involved in this evaluation? *
This setting cannot be changed after this step. [Learn more about candidate involvement.](#)

Yes, the candidate will be involved during the case.
 No

Would you like to notify the candidates now? *
An automatic notification will be sent to the candidate after the case is created with instructions for uploading and submitting materials online.

Yes
 No

We are using 'Stella Tsirka' as an example.

6. When the case is created, go to **“Edit Case”** under **“Case Options”** button at the top, and then go to **“Case Review Steps”**.

Stony Brook University > Cases > Stella Tsirka >

Case Summary

[Edit](#)

Case Information

Type	Name
Review	Stella Tsirka
Unit	Email
Pharmacological Sciences	Styliani-Anna.Tsirka@stonybrook.edu

Candidate Requirements [Edit](#)

Included Forms

- R SOM Annual Review Candidate Form
- R SOM Annual Review Response

> Candidate Documents

> Candidate's Response

Internal Case Sections [Edit](#)

Committee Documents [In Use](#)

External Evaluations [Special Section](#)

Case Review Steps [Edit](#)

> 1. Chair Review

Title	Details
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7. After that, click on the **“Chair Review”** step, and it will bring you to the screen below:

Stony Brook University > Cases > Stella Tsirka > Case Review Steps >

Edit Details

Step Details (Step 1 of 1)

Step Name Chair Review	Academic Level Academic levels manage which administrators and case managers have access at this step. Level 1 Level 2 Level 3 Level 4 MANAGE ACADEMIC LEVELS
Due Date -	

[Edit Step Details](#)

Reviewers

[+ Add Committee](#)

▼ **Chair** [Options](#)

Ad Hoc Committee (0)

[Manage Members](#) [Instructions](#) [Required Documents](#) [Required Forms](#) [Settings](#)

No Members

[Add Members](#)

[Return to Case Review Steps](#)

- Click on **“Add Members”** and select the Chair of the Department/Unit and their designees responsible for the review. Mark the member who will be filling out the review form with a star next to their name (*Andrei Antonenko in this example*).

Step Details (Step 1 of 1)

Step Name
Chair Review

Due Date
-

[Edit Step Details](#)

Academic Level
Academic levels manage which administrators and case managers have access at this step.

[Level 1](#) [Level 2](#) [Level 3](#) [Level 4](#)

[MANAGE ACADEMIC LEVELS](#)

Reviewers [+ Add Committee](#)

Chair [Options](#)
Ad Hoc Committee (1)

[Manage Members](#) [Instructions](#) [Required Documents](#) [Required Forms](#) [Settings](#)

1 Member

AA Andrei Antonenko
andrei.antonenko@stonybrook.edu [★](#) [x](#)

[Add Members](#)

[Return to Case Review Steps](#)

- Click on **“Return to Case Review Steps”** to save the changes. Return to the case main page — you can click the name of the candidate at the top in a hierarchy:

Stony Brook University > Cases > **Stella Tsirka** > Case Review Steps

From there, click on **“Send Case”** button at the top, and send the case to the candidate.

10. The candidate will then receive an email about the initiation of the annual review, and after they click on the link in the email and log into Interfolio, they will see the following screen:

The screenshot shows the 'RSOM - Annual Review' overview page. At the top, there are navigation links for 'Stony Brook University > Your Packets >' and buttons for 'View Instructions' and 'Preview Packet'. Below this is a table with the following data:

Unit	Type	Packet Deadline Type	Packet Due Date
Pharmacological Sciences	Review	Soft Deadline	

Below the table are tabs for 'Overview' and 'Packet'. A paragraph states: 'Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward your packet. To learn more, read the Candidate's Packet Guide.' The 'Candidate Documents' section shows 'Not Yet Submitted Unlocked' and an 'Edit' button. It contains a table with the following data:

Type	# Required	# Added
✓ Additional Documents	0 required	0
● CV	1 required	0
● RSOM Annual Review Candidate Form	12 required	0

To the right of this table is a circular progress indicator. Below the 'Candidate Documents' section is the 'Candidate's Response' section, also showing 'Not Yet Submitted Unlocked' and an 'Edit' button.

11. On that screen, the candidate will have to click “**Edit**” button near “Candidate Documents” section, upload their CV, and fill out “**RSOM Annual Review Candidate Form**” through the following screen.

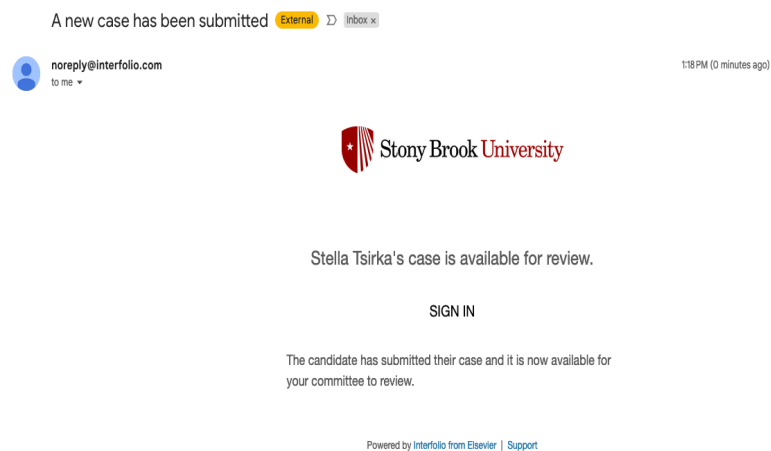
The screenshot shows the 'Candidate Documents' section in a detailed view. It includes a 'Submit' button and a progress indicator '0 of 1 Required Files'. The section is divided into three rows:

- Additional Documents**: 0 Added. A message states 'No files have been added yet.' with an 'Add' button.
- CV**: 1 required, 0 Added. A message states 'Please upload your HSC CV.' with an 'Add' button.
- RSOM Annual Review Candidate Form**: 12 required questions. A message states 'This form has not been completed.' with a 'Fill Out Form' button.

12. The form has the following questions:

- *Summary of Research/Scholarship (Publications/Grants) Activity*
- *Goals for Research/Scholarship (Publications/Grants) Activity*
- *Summary of Clinical Activity*
- *Goals for Clinical Activity*
- *Summary of Teaching Activity*
- *Goals for Teaching Activity*
- *Summary of Institutional Activity*
- *Goals for Institutional Activity*
- *Summary of Professional Growth/Faculty Development*
- *Goals for Professional Growth/Faculty Development*
- *Summary of Mentoring (Trainees/Faculty) Activity*
- *Goals for Mentoring (Trainees/Faculty) Activity*
- *Summary of Other Activity*
- *Goals for Other Activity*

13. After CV is uploaded and the form is filled out, the Candidate will click “**Submit**” button, and the Chair will receive an email notifying them that all the documents from the candidate were submitted and the case is available for review.



14. Upon clicking the link in the email and logging into Interfolio, the Chair will see the candidate's submission, which they will have to review:

Stella Tsirka Case Options

Unit: Pharmacological Sciences Template: RSOM - Annual Review Status: [Select Status](#)

[Case Materials](#) [Case Details](#) ¹

Search case materials by title Q Read Case

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 Locked Unlock

Additional Documents optional Add File

No files have been submitted.

CV 1 required Add File

15. After reviewing the submission, the Chair will click on “**Case Details**” tab at the top, and get access to the Chair’s form. Clicking on “**Fill Out Form**” link will allow the chair to fill out and submit the form.

Stella Tsirka Case Options

Unit: Pharmacological Sciences Template: RSOM - Annual Review Status: [Select Status](#)

[Case Materials](#) [Case Details](#) ¹

Reviewing as
Chair

Instructions
Please review candidate's submission and fill out the form.

Required Items 1 missing
All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Forms

Form Name	Assignee	Actions
RSOM Faculty Review - Chair's Form 15 required questions	Committee Managers	Manage Respondents
RSOM Faculty Review - Chair's Form 15 required questions	Andrei Antonenko (You)	Fill Out Form

16. The questions in the form are as follows:

1. *Research/Scholarship (Publications/Grants): Expectations were (not met/met/exceeded)*
2. *Comments on Research/Scholarship (Publications/Grants)*
3. *Clinical Activities: Expectations were (not met/met/exceeded)*
4. *Comments on Clinical Activities*
5. *Educational Activities: Expectations were (not met/met/exceeded)*
6. *Comments on Educational Activities*
7. *Administrative Activities: Expectations were (not met/met/exceeded)*
8. *Comments on Administrative Activities*
9. *Citizenship/Service Activities: Expectations were (not met/met/exceeded)*
10. *Comments on Citizenship/Service Activities*
11. *Mentoring (Trainees/Faculty) Activities: Expectations were (not met/met/exceeded)*
12. *Comments on Mentoring (Trainees/Faculty) Activities*
13. *Was the annual review done at face-to-face meeting? (Yes/No)*
14. *What can the department do to help the faculty member succeed in their professional goals?*
15. *Should there be a follow-up meeting? (Yes/No)*
16. *Was well-being discussed at the meeting? (Yes/No)*
17. *Comments on well-being*
18. *Has faculty member accomplished career goals for the previous year?
(Outstanding/Above average/Average/Poor)*
19. *Is Faculty Member progressing in all aspects of academic activities?
(Outstanding/Above average/Average/Poor)*
20. *Comments/Areas of Strength or Need for Improvement*
21. *Describe how Faculty Member can accomplish proposed goals for upcoming year*
22. *Describe what Chair needs to provide to assist Faculty Member in meeting goals*
23. *Additional comments.*

17. After filling out the form, the Chair will have to share the form with the Faculty member, by making them a member of Chair Review committee. To do that, the Chair will click **“Edit”** near **“Committee Members”** section, search for the candidate, and add them.

Required Items

All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however omit the form as a requirement for a user.

Forms

Form Name	Assignee
RSOM Faculty Review - Chair's Form 15 required questions	Committee Managers
RSOM Faculty Review - Chair's Form 15 required questions	Andrei Antonenko (You)

Committee Members (1) [Email](#) [Edit](#)

Name	Email	Role
Andrei Antonenko	andrei.antonenko@stonybrook.edu	Manager

Voting Results

Done

Sort By Name ▼ [New](#)

First Name	Last Name	Email	
Stella	Tsirka	Styliani-Anna.Tsirka@stonybrook.edu	+ Add

Committee Members (2) [Email](#) [Edit](#)

Name	Email	Role
Andrei Antonenko	andrei.antonenko@stonybrook.edu	Manager
Stella Tsirka	Styliani-Anna.Tsirka@stonybrook.edu	

- After that, the Chair should share the results of the review with the candidate. Click on **“Email”** button in Committee Members section, write a message to the candidate, and click on a **(+) button** next to **“RSOM Faculty Review – Chair’s Form”** under **“Share Files”** section.

Message to Committee

To
 Andrei Antonenko (andrei.antonenko@stonybrook.edu) x Stella Tsirka (Styliani-Anna.Tsirka@stonybrook.edu) x

Add Another: User | Committee

Subject *
 Review Complete

Message *
 Hi Stella, I have completed your review. Please see the link.

body p

Share Files
 Files shared with this message can be viewed by the recipient(s) after logging into Interfolio.

Invoice 137 - Deposit x

Search Materials Select All x

+ RSOM Faculty Review - Chair's Form

- The candidate will then receive the email, asking them to log into interfolio, where they will be able to see the form filled out by the chair.
- After that, in **“Your Packets”** section, the candidate will be able to go to their case, and submit the ‘candidate’s response’, which can then be viewed by the Chair through

Pharmacological Sciences Review Soft Deadline

Overview Packet

Below you will find an overview of the packet requirements outlined by your institution. This page will be updated as you make progress toward your packet. [To learn more, read the Candidate's Packet Guide.](#)

Candidate Documents View

Submitted Locked

Type	# Required	# Added
Additional Documents	0 required	0
CV	1 required	1
RSOM Annual Review Candidate Form	12 required	12

Candidate's Response Edit

Not Yet Submitted Unlocked

Type	# Required	# Added
Additional Documents	0 required	0
RSOM Annual Review Response	2 required	0

Interfolio, acknowledging (agreeing or responding) to the Chair’s evaluation. This concludes the annual review process.