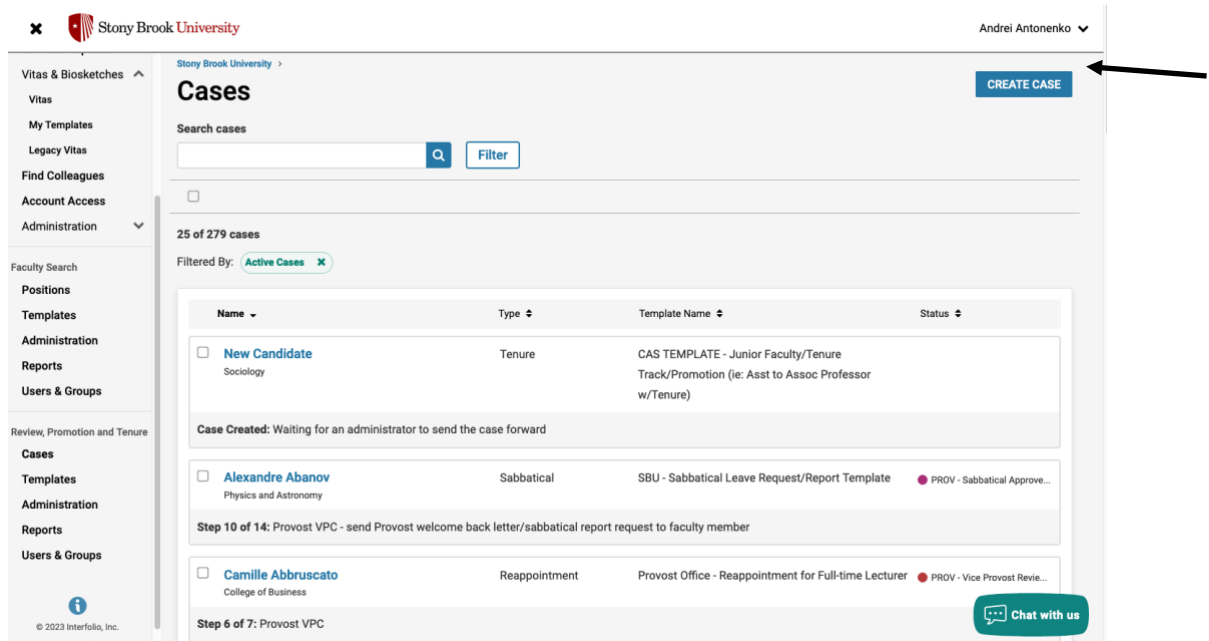


Annual Review Process

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. In the left menu, choose “Cases” under “Review, Promotion and Tenure” section.
3. When in this section, click “Create Case” button in the top right corner of the screen.

4. Choose the candidate, candidate's Unit/Department, and the Type: **Review**. At the bottom of the

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 |

screen, choose the template “**RSOM - Annual Review**”.

5. After that, 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 |
|---|------------------------|
| ST 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

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

Stony Brook University > Cases >

Stella Tsirka

Unit: Pharmacological Sciences | Template: RSOM - Annual Review | Status: Select Status

Case Options (dropdown menu):

- Edit Case
- Email Candidate
- Add Internal Section
- View Activity Log
- Close Case

Search case materials by title

Expand All | Collapse All | Download | Share | Settings | **Case Options** (arrow points here)

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 (Unlocked) [Lock]

Additional Documents optional [Add File]

No files have been submitted.

CV 1 required [Add File]

No files have been submitted.

| Title | Details |
|-------|---------|
|-------|---------|

to “Case Review Steps”.

Stony Brook University > Cases > Stella Tsirka >

Case Summary

Case Information

Type: Review | Name: Stella Tsirka

Unit: Pharmacological Sciences | Email: Styliani-Anna.Tsirka@stonybrook.edu

[Edit](#)

Candidate Requirements

Included Forms: RSOM Annual Review Candidate Form, RSOM Annual Review Response

[Edit](#)

- Candidate Documents
- Candidate's Response

Internal Case Sections

Committee Documents (In Use)

External Evaluations (Special Section)

[Edit](#)

Case Review Steps

1. Chair Review

[Edit](#)

Creating a Case

- Case Information
- Candidate Requirements
- Internal Case Sections
- Case Review Steps
- Case Summary**

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

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

Edit Details

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
Ad Hoc Committee (0) [Options](#)

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

No Members

[Add Members](#)

[Return to Case Review Steps](#)

8. 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

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

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

1 Member

[Add Members](#)

[Return to Case Review Steps](#)

Andrei Antonenko
andrei.antonenko@stonybrook.edu

★

next to their name (*Andrei Antonenko in this example*).

9. 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:

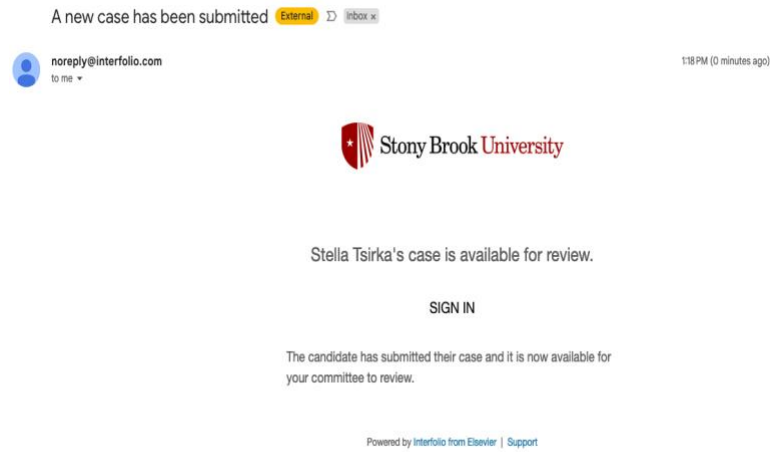
Stony Brook University > Cases > **Stella Tsirka** > Case Review Steps

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 will have to submit their CV and fill out the form with 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*

11. 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.



12. Upon clicking the link in the email and logging into Interfolio, the Chair will see the candidates

Stella Tsirka Case Options

Unit: Pharmacological Sciences Template: RSOM - Annual Review Status: Select Status

Case Materials Case Details 1

Search case materials by title [Search] 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

submission, which they will have to review:

13. Upon review of 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

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.

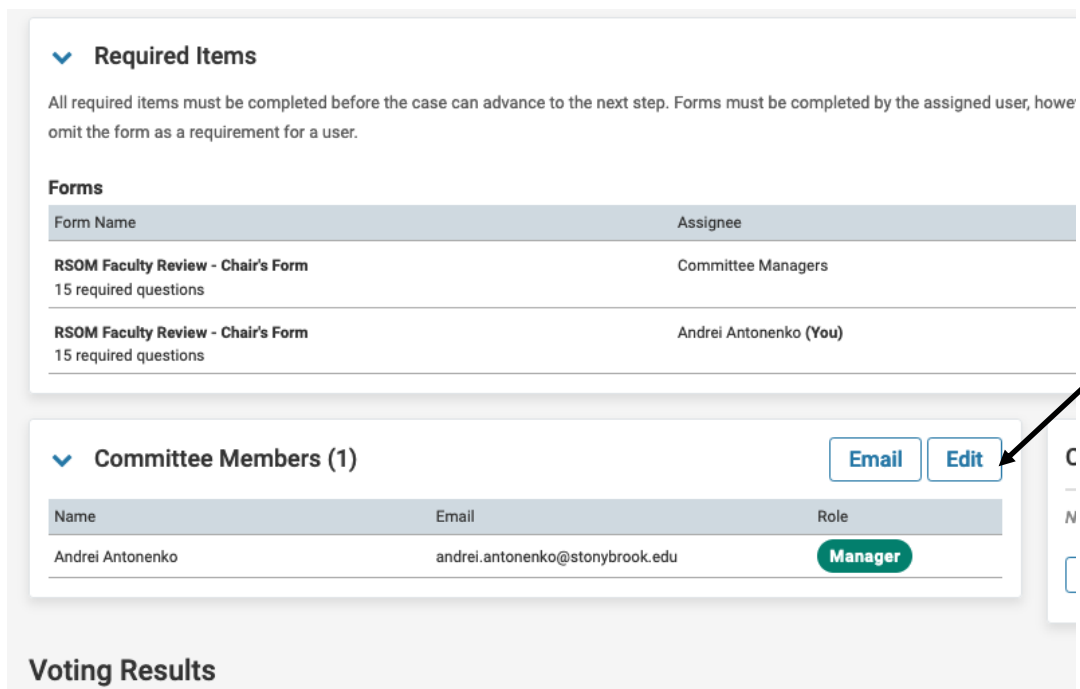
| Form Name | Assignee | Actions |
|---|------------------------|--------------------|
| RSOM Faculty Review - Chair's Form 15 required questions | Committee Managers | Manage Respondents |
| RSOM Faculty Review - Chair's Form 15 required questions | Andrei Antonenko (You) | Fill Out Form |

submit the form.

14. 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.*

15. 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



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, you can 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) |

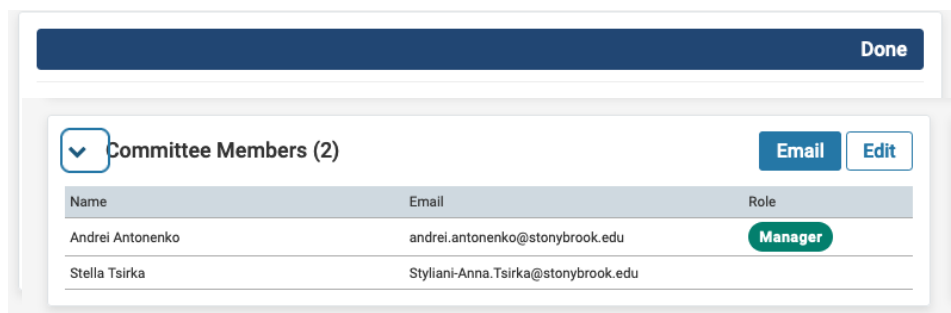
Committee Members (1)

[Email](#) [Edit](#)

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

Voting Results

“**Committee Members**” section, search for the candidate, and add them.



Committee Members (2)

[Email](#) [Edit](#)

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

16. 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

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