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

5. Then choose the following option in **Settings**:
   - **Yes**, the candidate will be involved during the case.
   - **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”.

7. After that, click on the “Chair Review” step, and it will bring you to the screen below:
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 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 after they click on the link in the email and log into Interfolio, they will see the following screen:

![RSOM - Annual Review](image1)

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.

![Candidate Documents](image2)
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:

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.
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.
18. 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.

19. 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.

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