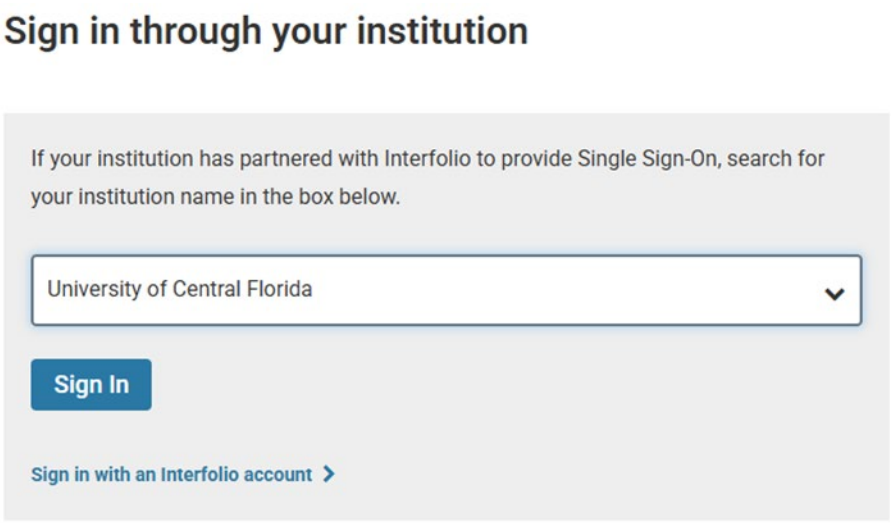
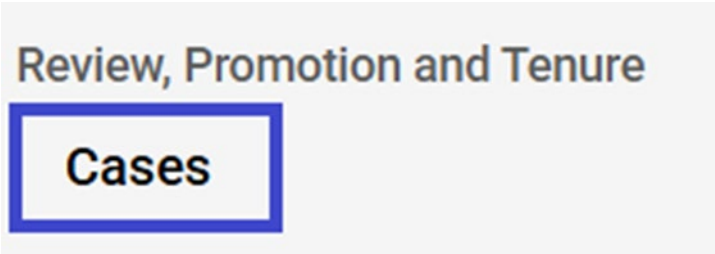
LOGIN TO INTERFOLIO

You can access Interfolio with the method shown below:

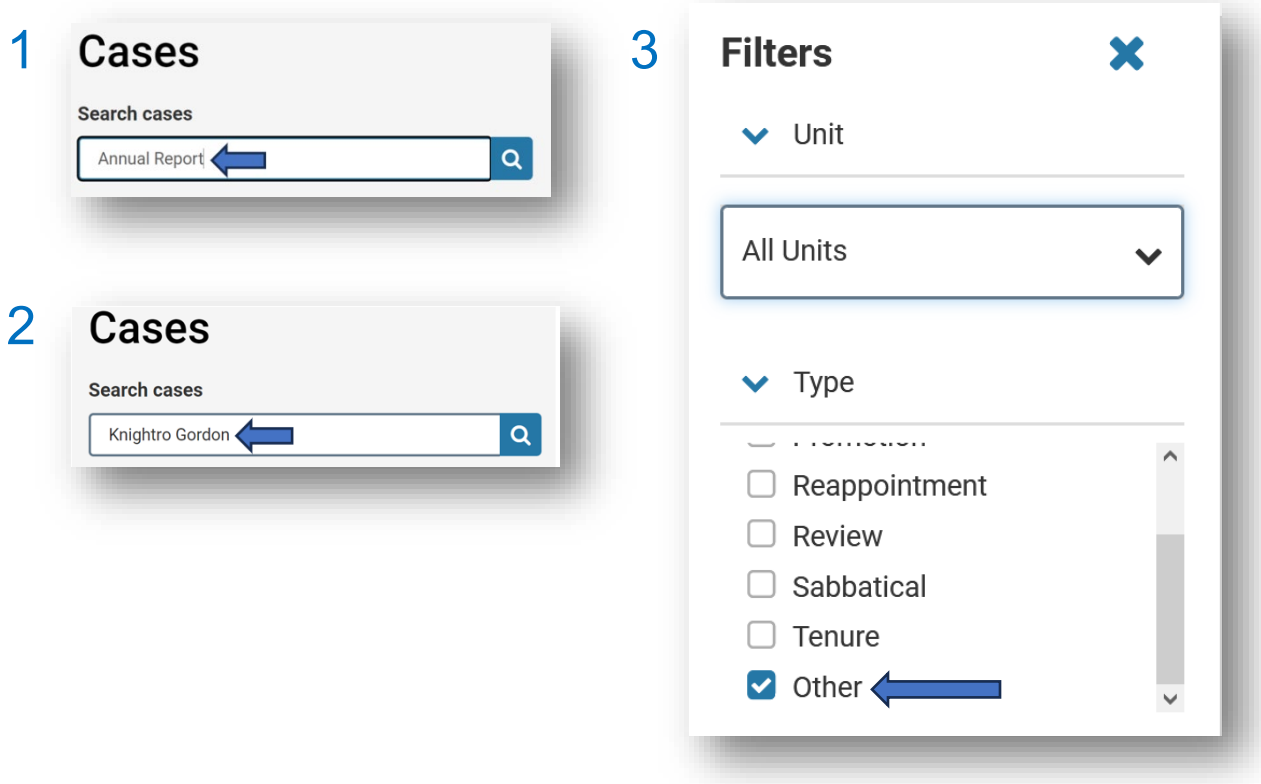
Follow this link, select/type 'University of Central Florida' from the drop-down menu. Select “Sign In,” then enter your NID@ucf.edu and password.



STEP 1 – After signing in to Interfolio**,** on the left side of the screen, select ‘Cases’, under the ‘Review, Promotion, and Tenure’ option. Once selected you will be redirected to a new screen where you can filter your cases.

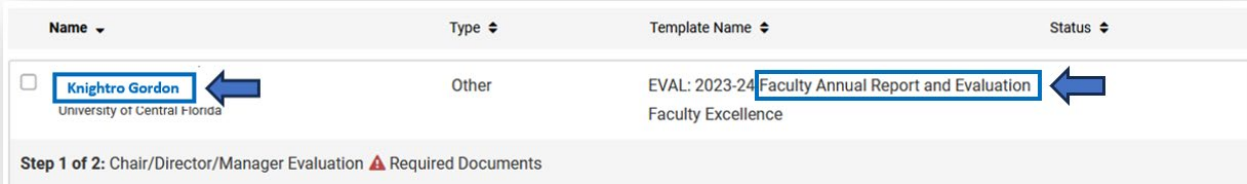


Note: Select “Cases” from the left menu. All cases that require manager attention appear by name in alphabetical order. Locate the case to review by (1) searching for the process (e.g., annual report), (2) searching for the faculty name (e.g., Knightro Gordon), or (3) filtering your cases by selecting “Filter” by Type (use “Other” for Annual Reports and Evaluations).

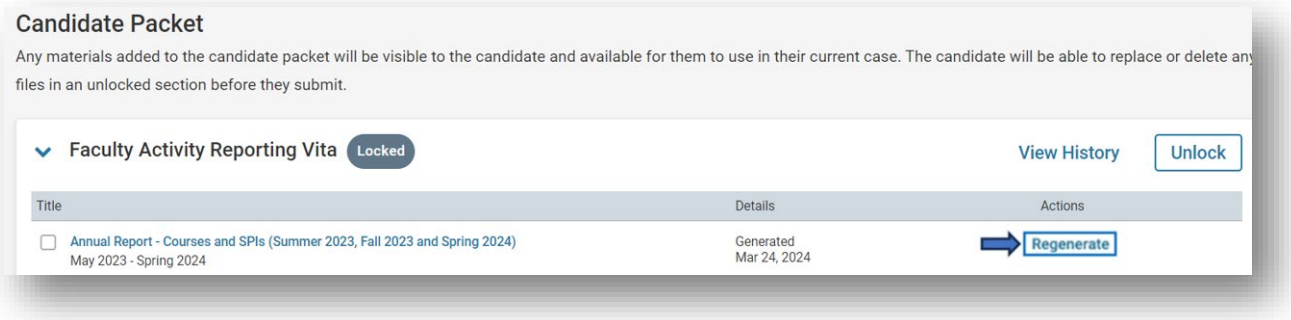


STEP 2 – Review a case by selecting the name to review.

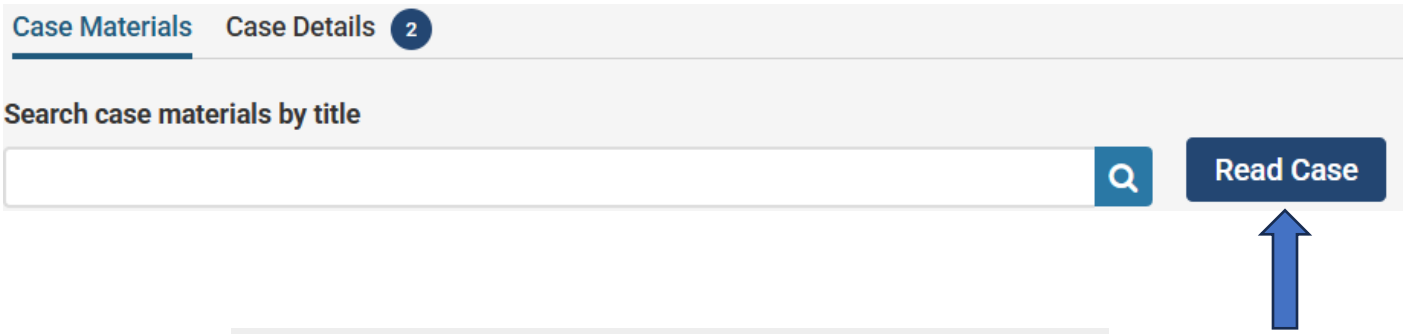
Note: Faculty may have more than one case (e.g., Annual Report and Evaluation, Promotion, Post-Tenure Review). Be sure to select the case for Faculty Annual Report and Evaluation.

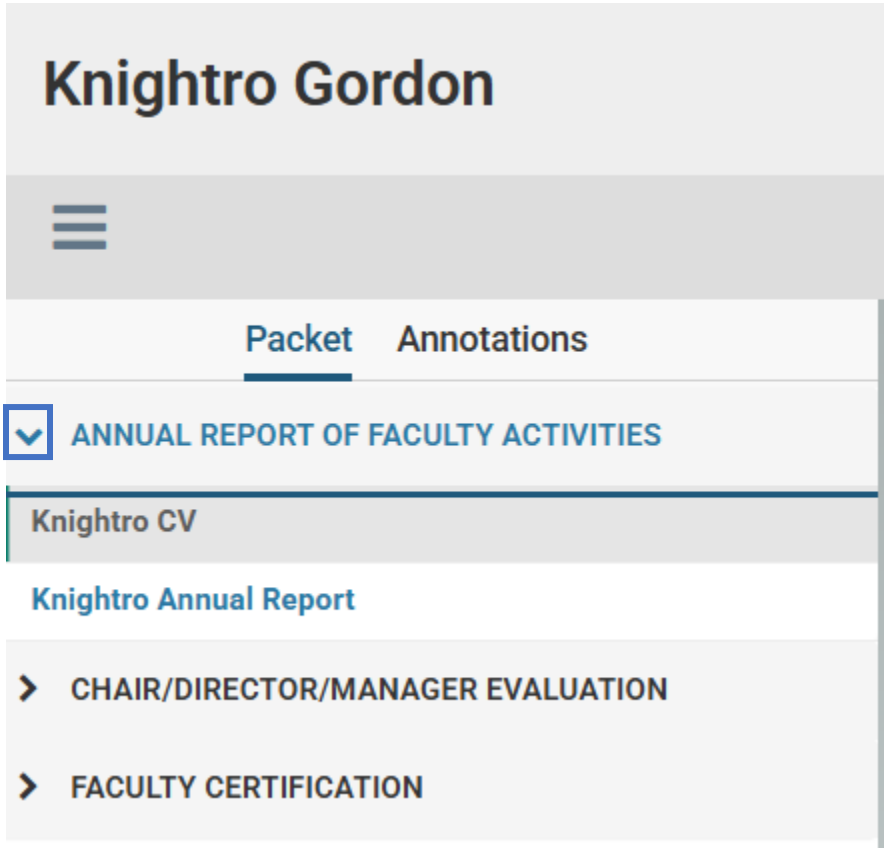


STEP 3 – ***Faculty Activity Reporting Vita***. Select "Regenerate" to pull in courses and SPOIs loaded since the faculty submitted their annual report.

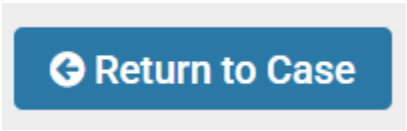


STEP 4 – To review the faculty packet, select "Read Case" and wait for Interfolio to reload. Navigate through the left reading pane to read the materials. Click the 'carrot' to expand the section.



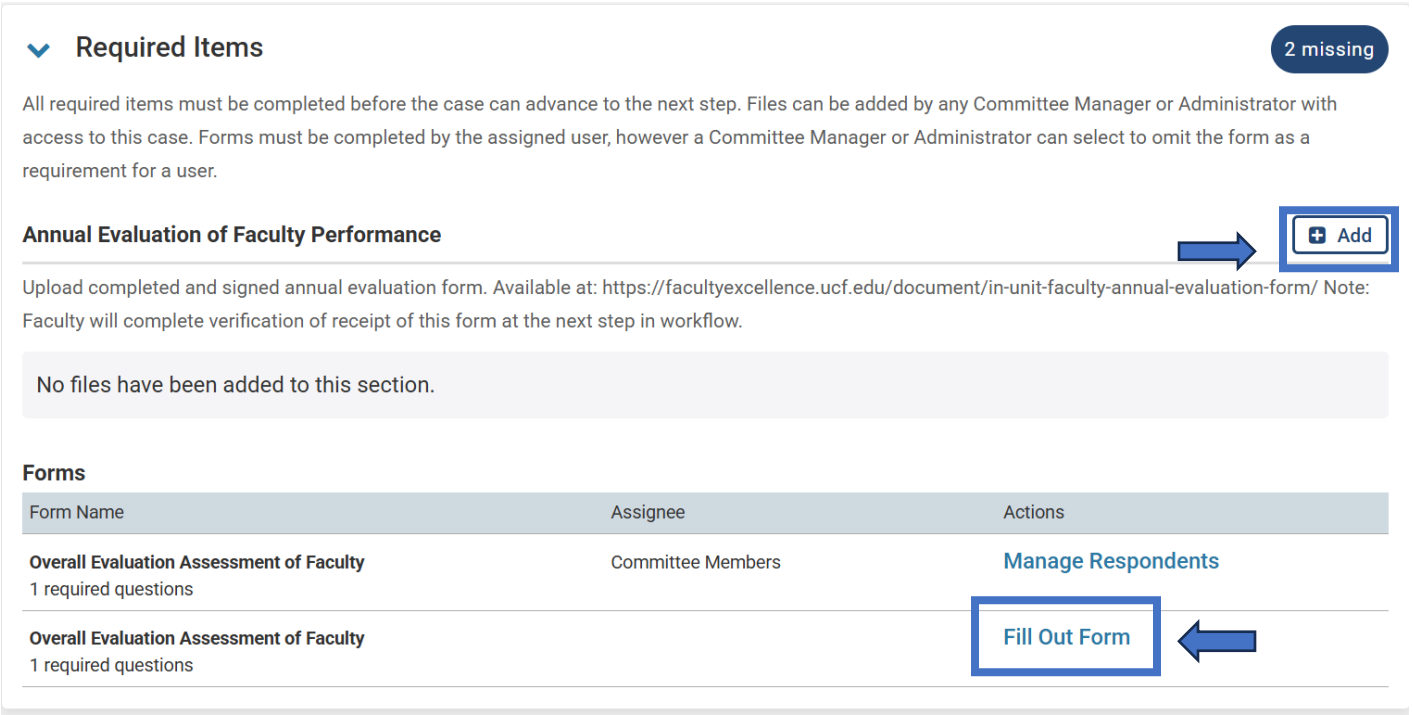


Note: When you are done reviewing the materials, use "Return to Case" to return to the previous screen.



STEP 5 – After reviewing the faculties materials, return to the main case screen and select "Case Details" tab to complete / view the required items.

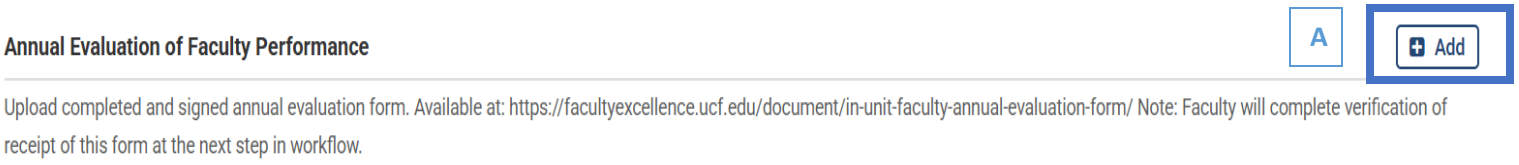
STEP 6 – After selecting "Case Details", scroll down to see the two missing items. The first item (A) will require you to fill out the form outside of Interfolio and reupload to the case.
The second item (B) is a form you complete in Interfolio by selecting "Fill Out Form" as shown below.

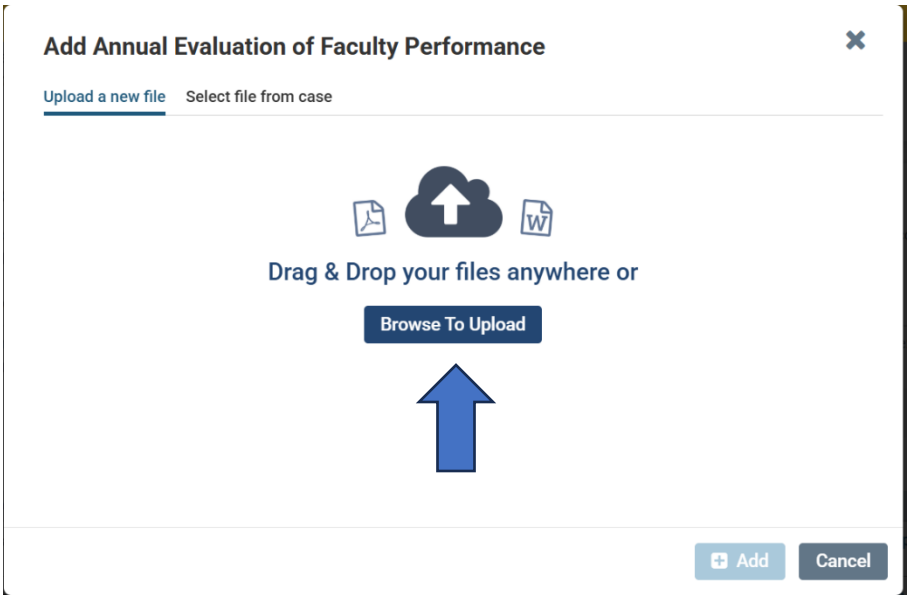


A. Complete the evaluation on the appropriate annual evaluation form:

- In-unit annual evaluation
- Non-unit annual evaluation

1. Digitally sign the form.
2. "Print to PDF" to retain the signature. (Print to PDF instructions are at end of guide)
3. Upload as demonstrated below.

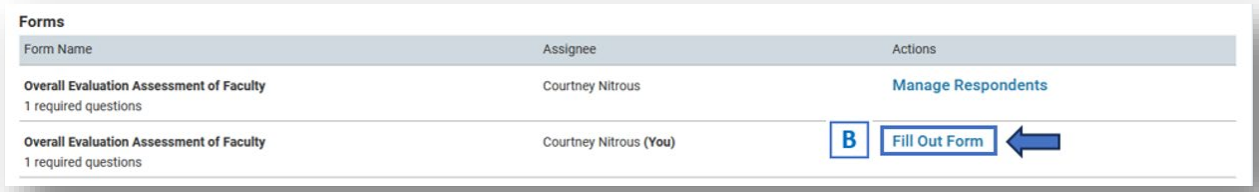




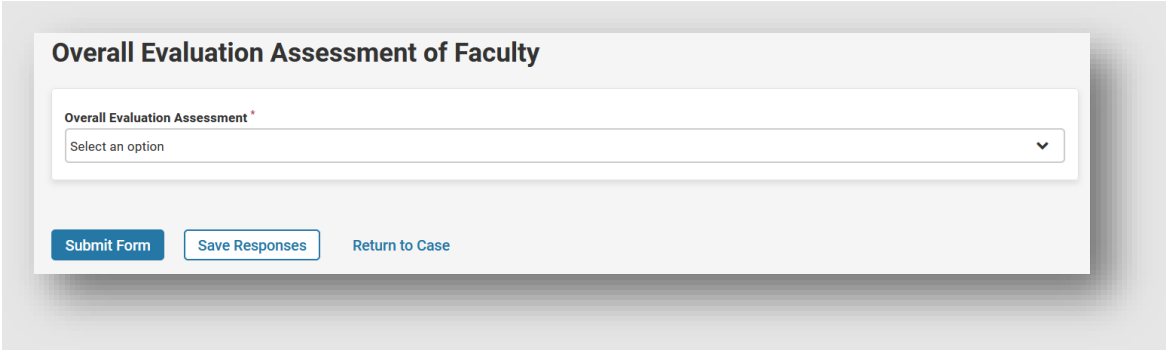
Outside Interfolio Business Process: Send the digitally signed evaluation to faculty to obtain their signature. After the faculty signs, place the complete signed form in the faculty's personnel file within the dean's office.

Note: Please make sure the faculty has a final copy of the annual evaluation, with all signatures.

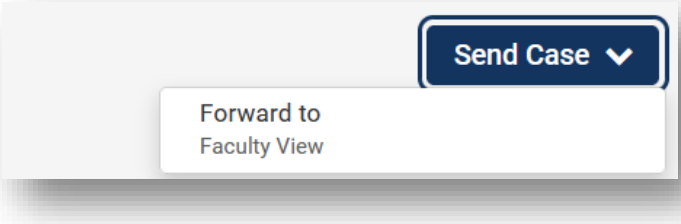
B. Complete Overall Evaluation Assessment of Faculty form.



Select the overall rating for faculty (i.e., Outstanding, Above Satisfactory, Satisfactory, Conditional, Below Satisfactory).



STEP 8 – "Send Case" "Forward to Faculty View."

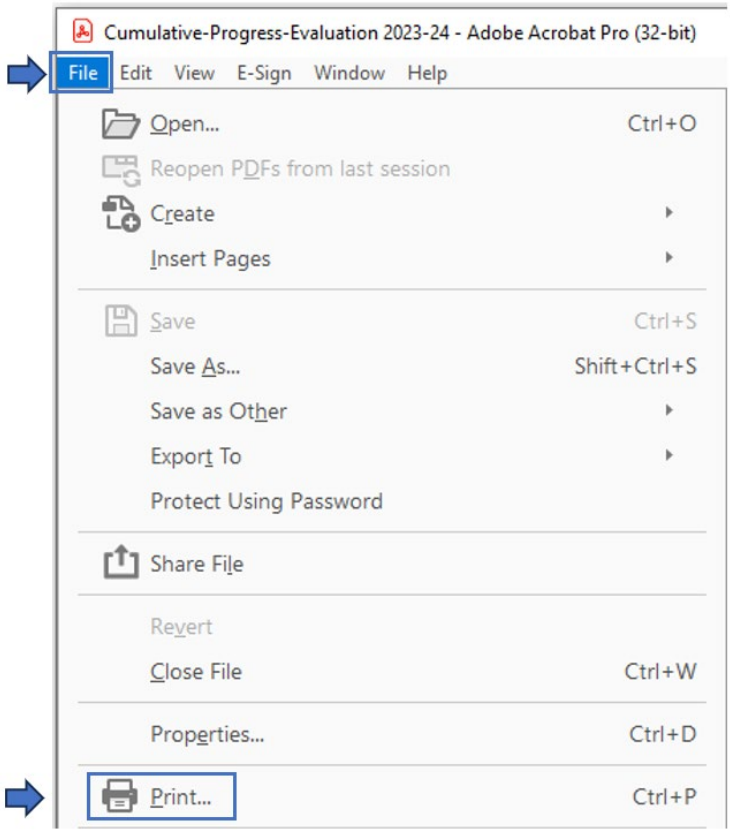


This completes the Faculty Annual Report and Evaluation process.

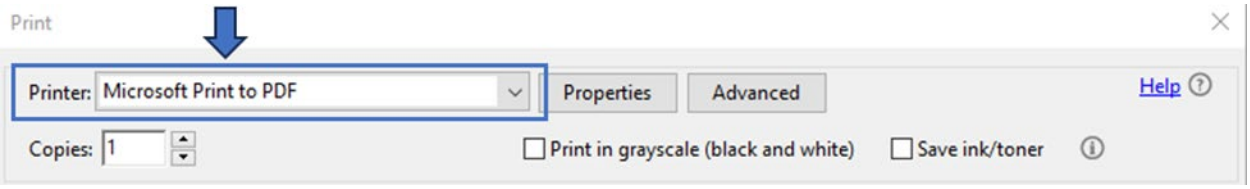
These are the steps to preserve an electronic signature on a document before uploading it.

STEP 1 - Open the PDF document that contains the electronic signature.

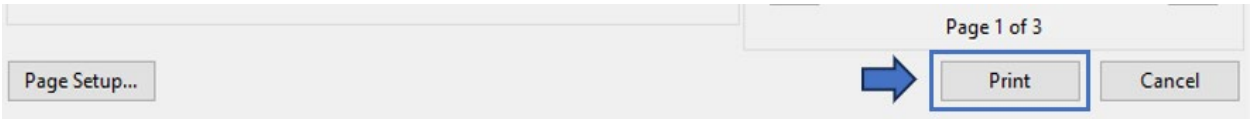
STEP 2 - Select "File" at the top left of the document you want to print, then select "print."



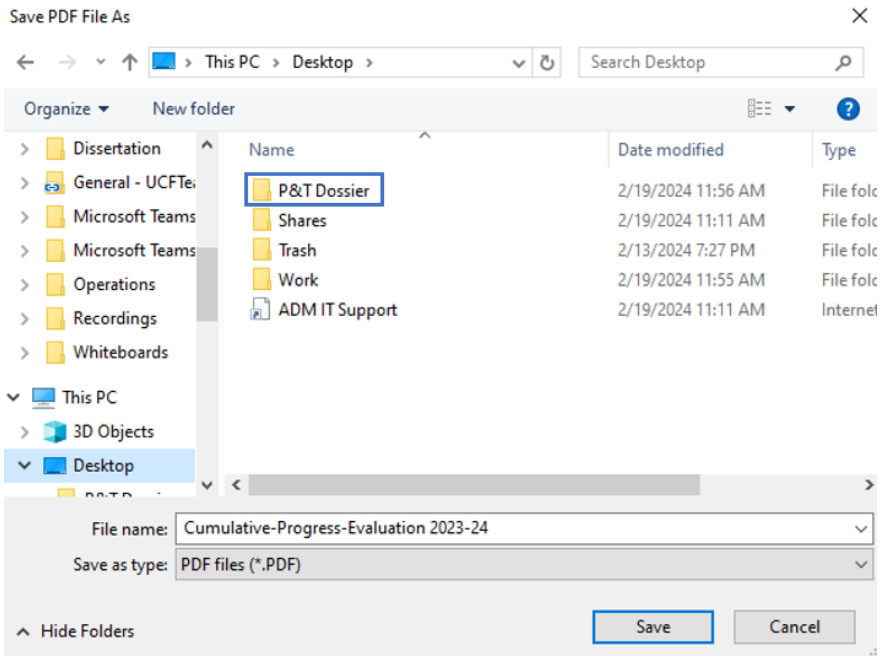
STEP 3 - Select "Microsoft Print to PDF" as the printer option.



STEP 4 - Select "Print" at the bottom of the window.



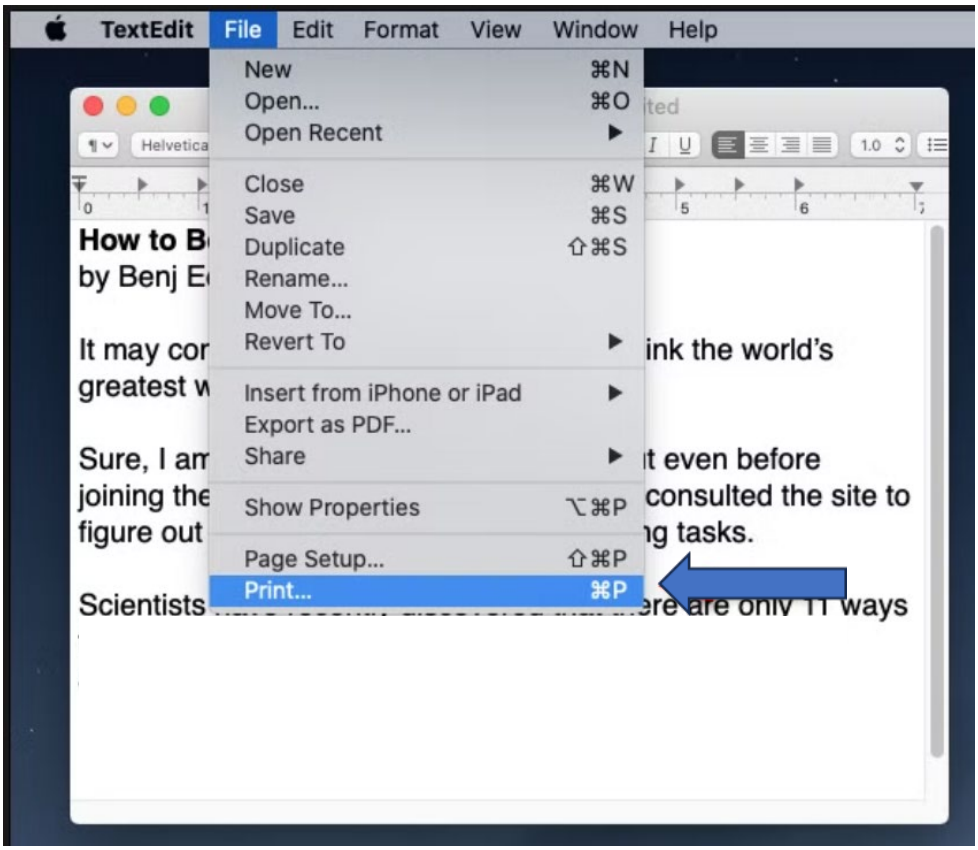
STEP 5 - In the save dialogue box that pops up, choose where to save the file and select "Save."



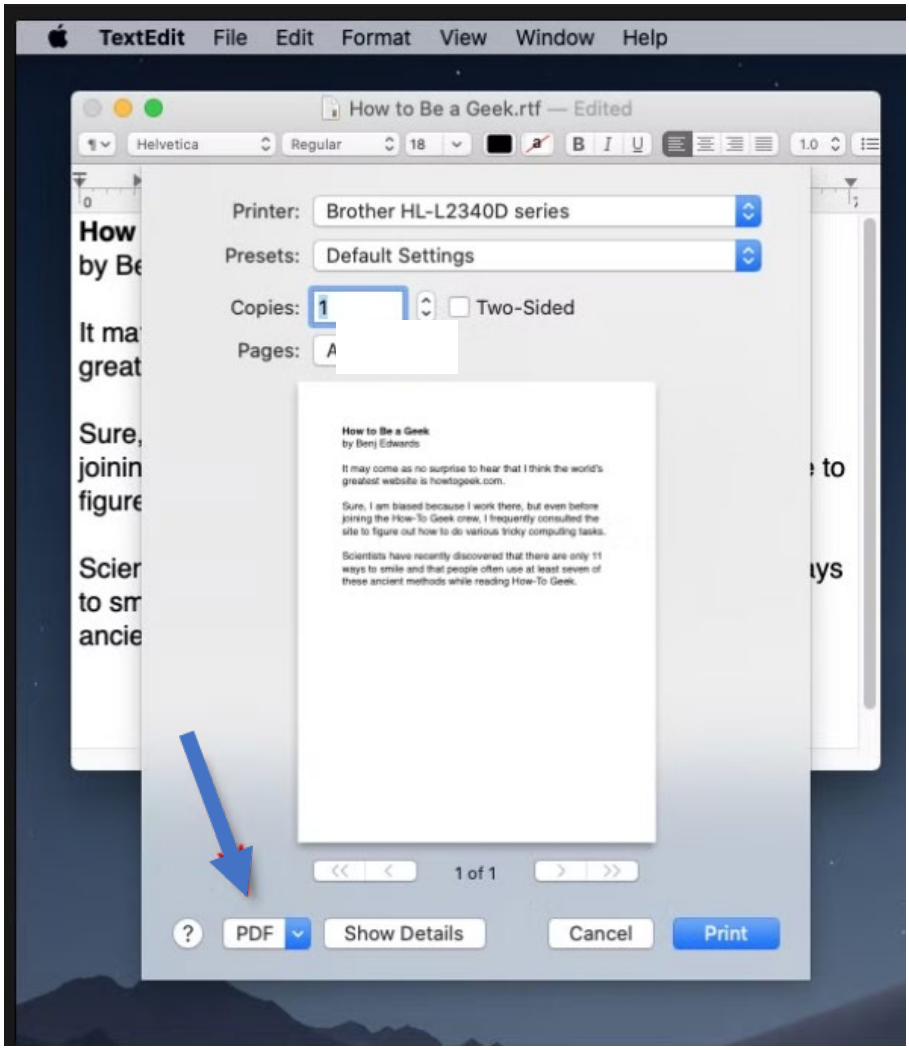
This completes the Print to PDF process for Windows OS

Print to PDF (macOS)

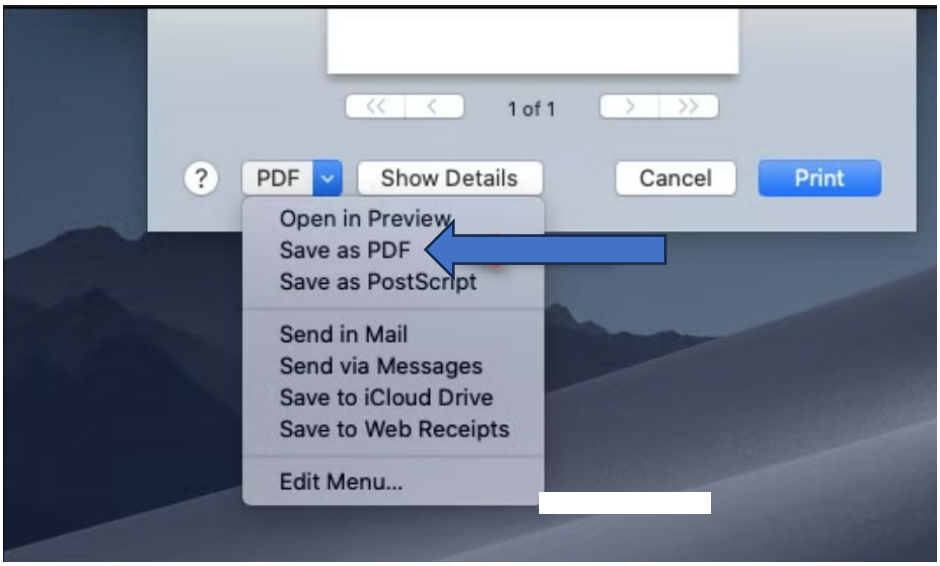
STEP 1 - Open the document you'd like to print to a PDF file. In the menu bar at the top of the screen, select File > Print.



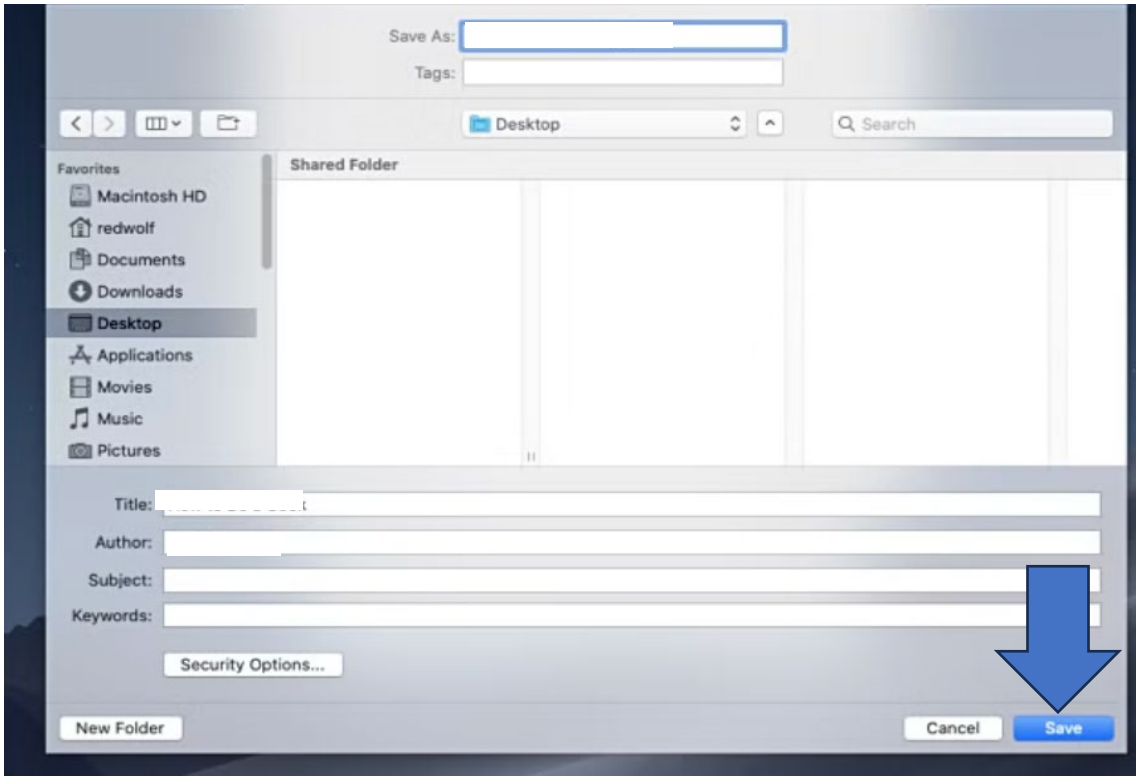
STEP 2 - A printing dialog will open. **Ignore the Print button**. Near the bottom of the Print window, you will see a small drop-down menu labeled "PDF." Click on it.



STEP 3 – In the PDF drop-down menu, select "Save as PDF."



STEP 4 – The Save window will open. Type the file name you'd like and choose the location, then "Save."



This completes the Print to PDF process for Mac OS