



# Letter Writer User's Guide

## Introduction

You are reading this guide because one of your students or advisees has asked you to write a letter of recommendation on their behalf and they have asked you to submit your letter to Interfolio. Since we know many letter writers are new to the Interfolio process, we've created this comprehensive step-by-step instruction guide to walk you through the process.

Here is a high-level view of the letter writer process.

1. **Receive a letter-writing request** from an Interfolio fileholder. This request may be in the form of an email or may be on a piece of paper.
2. **Write the letter.**
3. **Submit the letter to Interfolio**
  - a. The letter may be printed on letterhead, signed and sent to Interfolio. (We will scan the letter and upload it into the system).
  - b. The letter may be saved on electronic letterhead, signed with a digital image of the signature and uploaded into the Interfolio system.
4. The Fileholder receives a system notification from Interfolio that the letter has been submitted. The Fileholder may include that letter with application materials.

The following pages will include step-by-step instructions and further detail on that process. Please reach us at (877) 77-FOLIO or [help@interfolio.com](mailto:help@interfolio.com) for specific questions and concerns.

Thank you!

## PART I – Receiving a Letter Writing Request

Interfolio fileholders (students or alumni) initiate the letter-writing process, by creating a unique **request** for each letter they are seeking. In effect, they are reserving a space in their Interfolio account for the letter they are asking you to provide.

There are two ways for the fileholder to send you this request:

### Option 1: You may receive an Email Request

The fileholder enters your name, title, email address, and a brief personal note to you into the system. The system generates an email that is sent to your email address.

The email will resemble the email that appears on the opposite page. The two options for submitting the letter to Interfolio are listed in the email. Please see "Submitting A Letter of Recommendation to Interfolio" below for detailed instructions.

To: Michael Johnson (mjohnson@email.com)  
From: John Smith ([help@interfolio.com](mailto:help@interfolio.com))  
Sent: 10/18/07 4:17 PM  
Reply-to: John Smith (jsmith@email.com)

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Dear Prof. Johnson,

I am pursuing an opportunity that requires that I provide a letter of recommendation written about me by someone who knows me and my work. I am writing to request your assistance in that regard.

Thank You,  
John Smith

### HOW TO SUBMIT A LETTER TO INTERFOLIO

\* MAIL a printed copy of your letter with the request form to Interfolio. Click here to open and print the request form.

OR

\* UPLOAD an electronic version of your letter into the Interfolio system. Click here to log in or create an account:  
<http://www.interfolio.com>

Document ID: C18956

### ABOUT INTERFOLIO

Interfolio is an online document management service that allows fileholders to request, manage and send letters of recommendation from writers. The contents of confidential letters of recommendation will never be revealed to the fileholder.

*This message was sent through Interfolio. If you have a question, please contact Interfolio or the sender.*

- **Print out this page and hand to Letter Writer.**
- **Click the "Done" button to return to Manage Documents**

## Interfolio Document Request

Request from: Jane Demo Student Document title: Letter from Professor Smith  
Request date: 10/22/2007 Document ID: 24BAD8

### CONFIDENTIAL RIGHTS WAIVER

By creating this form, I acknowledge that under the Family Educational Rights and Privacy Act of 1974, it is my right to have access to letters of recommendation written on my behalf. However, I also understand that letters submitted in confidence may carry greater weight.

**It is my desire that this letter be written in confidence and therefore I waive all rights of access to this letter.**

*Digitally signed by Jane Demo Student on 9/11/07*

Select one of the following options to submit your letter to Interfolio:

#### Upload an Electronic Document to interfolio.com

1. Create a free Interfolio account at [www.interfolio.com](http://www.interfolio.com). (If you already have an account, please login.)
2. On the Write Recommendations page, enter the document id: **24BAD8**
3. Browse for your document and upload it.

OR

#### Mail a Paper Copy of Your Letter to Interfolio

1. Print and sign your letter or document
2. Print this form
3. Place the document and this form, without staples or paper clips, in an envelope addressed to Interfolio:

Interfolio, Inc.  
1900 L Street, NW #603  
Washington, DC 20036

**24BAD8**

#### About Interfolio

Interfolio is an online document management service that allows fileholders to request, store, and deliver letters of recommendation and other important files. The contents of confidential letters of recommendation will never be revealed to the fileholder.

For more information about Interfolio's free, secure letter writer service, please visit: <http://interfolio.com/recommendationwriters/>

*Interfolio use only:*



## Option 2: You may receive a Paper Request

Fileholders can also request a letter of recommendation by handing you a paper Interfolio Document Request form, which includes instructions on how to upload the letter. This paper request form will include a unique document ID. This document ID is a unique identifier that matches the fileholder with this specific request for a letter of recommendation.

A sample form is on the opposite page.

## **PART II – Submitting a Letter of Recommendation to Interfolio**

Interfolio accepts letters of recommendation from writers in two ways. You can upload an electronic copy of your letter into the Interfolio system or you can mail a paper copy of your letter to the Interfolio paper processing center.

### **Option 1: Upload Your Letter**

After you have received a request for a letter from a student using Interfolio, you have the option of uploading the document directly to Interfolio .

→Step 1: Prepare your letter for electronic upload:

- a. **Write** your letter using the word processing program on your computer using **electronic letterhead** if possible. (if you do not have electronic letterhead, please consult a university IT person).
- b. **Insert an electronic signature** at the bottom where you would sign the document (if you do not have an electronic signature, Interfolio can help. Please see "Your Signature instructions below)

→Step 2: Log in to an Interfolio letter writer account:

- a. If you are new to Interfolio, we ask that you set up a free writers account. If you received an email request, you can create your account by **clicking the link in the email**. Otherwise, simply go to the main letter writer page at **<http://www.interfolio.com/recommendationwriters/>** and click the orange button on the right side of the screen to register.
- b. If you have already uploaded a letter to Interfolio in the past, please do not try to register for an account. Please login at [www.interfolio.com](http://www.interfolio.com), or if you forgot your account information,

please get in touch with us (see contact information below) and we will get that to you immediately.

→Step 3: Upload your letter electronically:

Once you are logged into your account, you will have two options to upload your letter successfully.

- a. If the request was sent to you via e-mail to the address associated with your account, you will see information regarding the request on the main " Write Recommendations" screen as a "Pending Request." Follow the instructions that appear to the right of the student's name and upload the letter directly from your computer.
- b. If you received a paper Interfolio Document Request form, or have a Document ID number, please enter the 6-character Document ID in the appropriate box. Then, simply follow the instructions to upload the letter.

→Done: The fileholder will be notified that the letter you have uploaded is available to be included in deliveries.

### **Option 2: Mail Your Letter**

If you prefer this option, simply mail your letter of recommendation, along with the printed Interfolio Document Request form (SEE EXAMPLE ABOVE), to our offices at:

**Interfolio, Inc.  
Paper Processing Center  
1900 L Street, Suite 603  
Washington, DC 20036**

Upon receipt, we will scan and upload that letter within 1-3 business days. The student fileholder will receive an email notification when the document is uploaded and ready for use.

### **PART III - Using your Interfolio Writer Account.**

If you chose to create an Interfolio Writer account, you can use it to manage incoming letter writing requests, manage your previously uploaded letters, and update your signature. To start, log in and make sure the "Write Recommendations" tab is selected.

#### **View Pending Letters**

When you log in to your Interfolio account, you will be taken to the View Pending Letters page by default. You will see a list of all pending requests, meaning, those requests that you have not fulfilled.

You can fulfill those requests right from your pending letters page. Click on the Upload Letter or Mail Letter buttons that appear inline with the Fileholder name. To find out more information about the request, click on the Fileholder name to view the Request Details page.

#### **View Uploaded Letters**

One of the benefits of establishing an Interfolio account is that you may access your previously written letters.

To access your previously written letters, log in to your Interfolio account. On the Write Recommendations page, click on the link that says "View Uploaded Letters". You will see a list of all letters that you uploaded using your Interfolio account. From this page, you can download the PDF version or the original version of your document. Letters that you have mailed to Interfolio will not appear.

#### **Replacing Your Uploaded Letters**

Once your letter has been added to the Interfolio system, it is not editable. If you need to make a change to a letter you submitted to Interfolio, you will need to edit the local version of your letter that you have saved on your computer and re-submit your letter.

- *Replacing your letter **within 7 days** of upload:*

Interfolio allows writers to replace submitted letters within 7 days of their original upload. If you do this, we recommend that you notify the Fileholder. To replace a letter within 7 days of upload, navigate to your View Uploaded Letters page, locate the letter you would like to replace and click the "Replace" link. This will walk you through another document upload process. As soon as you upload the new letter, your original letter will be removed from the system.

- *Replacing your letter after **more than 7 days**:*

After 7 days of the original upload your letter, Interfolio will not allow you to replace your letters through your interface. If you need to replace a letter after the 7-day window has passed, you have two options.

1. Notify the Fileholder that you would like to replace your letter and ask the Fileholder to create a new document request for you. In doing so, you will be effectively adding a second letter to the Fileholder account so you will need to remind the Fileholder to delete the original letter so it is not used.
2. Notify Interfolio that you would like your letter deleted from the Fileholder account. Through our customer support channel, Interfolio will remove a letter from a Fileholder account; however you will still need to ask the Fileholder to create a new document request in order to provide a replacement letter. As soon as the Fileholder generates a placeholder, you can upload your new letter.

#### **Replacing Uploaded Letters Submitted By Mail**

If you realize there is an error in a letter that you submitted to Interfolio by mail, contact the Fileholder immediately. The Fileholder should know not to use that letter in any deliveries. The Fileholder is then able to create a new document request with a new document ID. You can mail a new copy of the letter with the new request form (and accompanying document ID) at any time.

## **Appendix: Preparing Your Document (Adding a signature and using electronic letterhead)**

### A. Your Signature

Many admissions offices and hiring committees prefer (and some require) the letter of recommendation to be signed. That is why we encourage you to insert a digital image of your signature into your electronic letters. If you do not already have a digital image of your signature, Interfolio can help. Please go to the "My Signature" section of your account and choose one of the following:

- How to Create A Signature

1. Mouse2Sig

The quickest way to upload your signature is through our innovative service, Mouse2Sig. You can create a copy of your signature using the mouse, and it will be instantly available to you.

2. Fax2Sig

We understand that Mouse2Sig is not for everyone, so we also offer Fax2Sig. In your "My Signature" section of your account, you will find instructions for uploading your signature using this method

- How to Insert Your Signature Into Your Document

Once you have acquired a copy of your signature, please make sure to insert the picture into your document BEFORE uploading the letter.

To insert your signature into your letter, you will need to take the saved signature file from your Interfolio account, download it and paste it into your word processing document. Navigate to the My Signature section of your account, click on the "How to insert your signature" button. The system will detect the type of computer

(Mac/PC) you are using and detect which browser you are using and provide you with customized instructions on how to insert your signature.

### B. Your Letterhead

We suggest submitting a letter of recommendation that is on university, departmental, or your company's letterhead. Interfolio does not currently store letterhead templates online for you but you should be able to acquire it through your department or company IT department. The letterhead usually comes in the form of a Word Document template onto which you can type your letter.

## **Frequently Asked Questions**

*Can I upload my letter without a signature?*

Interfolio does not require a signature however we know from our experience working with admissions offices and hiring committees that letters with a signature are preferred and occasionally required. If you have questions, you should ask the person for whom you are writing the letter if there is a signature requirement. Remember, mailing a paper copy of your letter to Interfolio is always an option.

*Can I upload my letter without electronic letterhead?*

Interfolio has the same policy with letterhead and signatures. We do not require letters be uploaded on letterhead however we know from our experience working with admissions offices and hiring committees that letters on letterhead are preferred.

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