Interfolio P&T Module

Department and College Staff Session

Faculty Affairs Team: Diane Kelly, Melanie Finnegan, Alyssa Thom, & Jenn Western.
Special Thanks!

Lisa Bonds
Naomi Breeden
Alexandria Brown
Pamela Durban
Paul Frymier
Elizabeth Greene
Tammie Jay
Chris Kilgore
Andrew Kramer
Chris Lavan

Ferlin McGaskey
Showni Medlin-Crump
Marla Roberts
Abebe Rorissa
Annamarie Russell
John Stier
David White
Brooke Wichmann
Lisa Yamagata-Lynch
Caveat 1: Variety of Local Practices that require Unification.

## Interfolio Terms

### Basic Actions
- Create Case
- Upload Files
- Complete Forms
- Send Email
- Advance/Send Back Case

### Roles
- Candidate
- Department Staff Case Facilitator (DSCF)
- Department Head (DH)
- External Evaluator
- Departmental Review Committee (DRC)
- College Staff Case Facilitator (CSCF)
- College Review Committee (CRC)
- Dean
- Faculty Affairs Reviewer (FAR)
- Provost
- Chancellor
- Board of Trustees
### Interfolio Terms

<table>
<thead>
<tr>
<th>Candidate Requirements</th>
<th>The parts of the dossier that are added by the candidate, such as research, teaching, and service statements, and department administrator(s), such as statement of responsibilities. All sections are visible to candidate and the candidate signs-off before the case advances.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Case Sections</td>
<td>This is the evaluative part of the dossier, including the external letters section and all levels of review from departmental to BOT. These sections are invisible to the candidate unless they are shared.</td>
</tr>
<tr>
<td>Case Review Steps</td>
<td>This defines the workflow and the current state of the case. There are currently 18 case review steps.</td>
</tr>
</tbody>
</table>
## Colleges Without Departments

Notes for Colleges without departments:

- All information in this presentation is still relevant. Your workflow will work the same, but you get fewer steps!
- Some terms may be different:

<table>
<thead>
<tr>
<th>Term for Colleges WITH Departments</th>
<th>Corresponding Term for Colleges WITHOUT Departments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Staff Case Facilitator</td>
<td>= College Staff Case Facilitator</td>
</tr>
<tr>
<td>College Staff Case Facilitator</td>
<td>= College Staff Case Facilitator</td>
</tr>
<tr>
<td>Departmental Review Committee</td>
<td>= College Review Committee</td>
</tr>
<tr>
<td>College Review Committee</td>
<td>= Intercollegiate Review Committee</td>
</tr>
</tbody>
</table>
Workflow Steps

Follow along with the Interfolio Workflow Quick Reference hand out.
Where to Begin?

provost.utk.edu/facultyaffairs/
Case Setup

- Review/Update Committees & Check Workflow
- Create case
  - Department Head can begin soliciting external letters
  - Attach documents for all “Provided by Administrator” sections (may do this AFTER notifying the candidate, depending on your unit’s workflow)
- Notify the candidate
  - Candidate can begin uploading documents

**Step 1 initiates after candidate submits all materials.**
Updating Committees

http://tiny.utk.edu/interfolio
Creating a Case

- Click "Create Case"

Existing Case(s)
Creating a Case

Search for candidate by first or last name.

Select “Yes”

Select your unit.
Creating a Case

Press “Confirm”
Select the correct template, you will only see templates available to your unit.
Select Type and “Save & Continue”

Select the “Type” from the dropdown. Type will be either Promotion or Tenure. If the case is for Promotion and Tenure select Tenure.

Click “Save & Continue”
Template Review

Candidate Requirements

Candidate's Packet Due

Mmm d, yyyy

Instructions To Candidate
Customize instructions to the candidate about assembling their packet and any other procedures, policies, or deadlines at your institution. You can also include links to required forms and online resources such as instructions or handbooks outlining your policies.

Packet Requirements
Create packet sections for materials you would like to receive from a candidate. Each section can contain a due date, a description, and requirements for particular materials (e.g., CV, teaching statement, syllabi).

- Cover Sheet (Provided by Faculty)
- Early Consideration, Suspension, and Extension Memos (Provided by Faculty)
- Statement of Responsibilities, Criteria Statements, and Other Documentation (Provided by Administrator)
Template Review

Packet Requirements

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- Cover Sheet (Provided by Faculty)
- Early Consideration, Suspension, and Extension Memos (Provided by Faculty)
- Statement of Responsibilities, Criteria Statements, and Other Documentation (Provided by Administrator)
- Teaching Ability and Effectiveness (Provided by Faculty)
- Teaching Ability and Effectiveness (Provided by Administrator)
- Research/Scholarship/Creative Activity (Provided by Faculty)
- Institutional, Disciplinary, and/or Professional Service (Provided by Faculty)
- Other Supporting Materials (Provided by Faculty)
- Materials not to be included without Dean's Approval
- Annual Performance and Retention Review Materials (Provided by Administrator)
- Curriculum Vitae (Provided by Faculty)
- Candidate Signature Statement (Provided by Faculty)

Click continue to advance through the steps. No changes needed!
## Template Review

### Packet Requirements

Create packet sections for materials you would like to receive from a candidate. Each section can contain a due date, a description, and requirements for particular materials (e.g., CV, teaching statement, syllabi).

- **Cover Sheet (Provided by Faculty)**
- **Early Consideration, Suspension, and Extension Memos (Provided by Faculty)**
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- **Curriculum Vitae (Provided by Faculty)**
- **Candidate Signature Statement (Provided by Faculty)**

Click “Case Summary” to jump to the end of the template review.
Click “Return to Case” to go to Case.
Creating Multiple Cases at Once Walkthrough

http://tiny.utk.edu/interfolio

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Add Administrator Documents

Add required documents. Once complete, hit “Lock” to prevent candidate from making changes to the section.
Notify Candidate

Click “Send Case” and select “Candidate”

Step 1 of the case review workflow initiates after the candidate submits all materials
Candidate and External Letter Overview

http://tiny.utk.edu/interfolio
Step 1

- Ensure all “Provided by Administrator” sections are complete
- Check candidate section to ensure all documents are uploaded, formatted correctly, etc.
- If needed, unlock candidate sections and request candidate corrections
- Consult with DH to ensure External Evaluation sections are complete
- Send case to College Staff Case Facilitator*

*Colleges without departments will skip Step 2 and send to CRC.
Reviewing Case Materials

Click "Read Case" to see a PDF view of all documents.

Scroll through case materials and use blue expand arrows to see attached documents.
Step 2

- Check candidate documents, department documents and external letters for completion and correctness
- Send case to Departmental Review Committee

*Colleges without departments skip this step*
Step 3

- DRC chair uploads review and completes required form
- Sends case to Department Staff Case Facilitator

*Colleges without departments Step 2. Replace DRC with CRC.*
Step 4

- Check DRC review is uploaded, including committee member list, and form is complete (check vote)
- Share DRC review with the candidate
- Track two-week response time
- Send case to Department Head once two-week window expires or candidate notifies of no response*

*CwoD Step 3. Replace DRC with CRC. Skip steps 5 – 7, send to ICRC.
Check Report and Form

From “Case Materials” tab, scroll down to appropriate section to review materials.
Send Report to Candidate

Share report from “Case Materials” tab.

Click the check box next to the document to be shared, then click “Share.”
Send Report to Candidate

Choose “With Candidate”
Send Report to Candidate

Enter “Subject” and “Message.” Suggested message templates can be found in “Case Details” tab.

Check “Enable” box under “File Response.” Enter “Message Reason” and set two-week “Deadline.” Be sure to select the correct section in the “Section for Response” drop down.

File will automatically be attached.
Step 5

- Department Head uploads review and completes required form
- Sends case to Department Staff Case Facilitator

*Colleges without departments skip this step*
Step 6

- Check for completion and correctness
- Share the DH’s review with the candidate and the DRC
- Track two-week response time to allow responses from both the candidate and the DRC
- If the DRC responds, share the response with the candidate and initiate a new two-week response time
- Once all responses are received (or all two-week response times have run out), send the case to the next step

*Colleges without departments skip this step*
Step 6 Flowchart

(Colleges without departments Step 7)

Two-week response time begins

Candidate:
- Allows two-week response time to run out OR
- Submits Do Not Intend to Respond form OR
- Responds

DRC:
- Allows two-week time to run out OR
- Submits Do Not Intend to Respond form OR
- Responds

Share DH’s narrative w/Candidate & DRC

Once all responses have been received and/or all two-week response times have run out, send the case to the next step

Share response w/ candidate

New two-week response time begins

Candidate:
- Responds OR
- Submits Do Not Intend to Respond form OR
- Allows two-week response time to run out

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Step 7

- Check all documents and forms that have come in since Step 2 for completion and correctness
- Send case to College Review Committee

*Colleges without departments skip this step*
Step 8

- CRC uploads review and completes required form
- Sends case to College Staff Case Facilitator

*Colleges without departments Step 4. Replace CRC with ICRC.*
Step 9

- Check CRC review is uploaded, including committee member list, and form is complete (check votes)
- Share CRC review with the candidate
- Track two-week response time
- Send case to Dean when two-week time expires or candidate notifies of no response

*Colleges without departments Step 5. Replace CRC with ICRC.*
Step 10

- Dean uploads review and completes required form
- Sends case to College Staff Case Facilitator

*Colleges without departments Step 6.*
Step 11

- Check Dean review is uploaded and form is complete
- Share Dean review with the candidate
- Track two-week response time
- Send case to Vice Provost for Faculty Affairs once two-week time expires or candidate notifies of no response

*Colleges without departments Step 7. See “Step 6 Flowchart” handout.
Steps 12 - 18

STEP 12: Vice Provost for Faculty Affairs
- Check for completion and correctness
- Send case to next step

STEP 13: Chief Academic Officer (CAO) (Provost)
- Upload narrative
- Complete form
- Send case to next step

STEP 14: Vice Provost for Faculty Affairs
- Check for completion and correctness
- Share CAO narrative w/candidate.
- Track two-week response window
- Send case to next step

STEP 15: Chancellor
- Upload narrative
- Complete form
- Send case to next step

STEP 16: Vice Provost for Faculty Affairs
- Check for completion and correctness
- Share Chancellor's narrative w/candidate.
- Send case to next step

STEP 17: Board of Trustees

STEP 18: Vice Provost for Faculty Affairs
- Send notification to candidate
- Finalize and close case
Tips to keep in mind

As your cases are moving through the Workflow Steps, you can always visit the “Case Details” tab to see “Instructions” for that step.
Tips to keep in mind

Sharing documents can only be done from the “Case Materials” tab.
Tips to keep in mind

- Two-week response window
- Tracker Templates provided: https://provost.utk.edu/tenure-promotion-unit-head-resources/
Questions?

- Interfolio quick link: http://tiny.utk.edu/interfolio
- Resources: https://provost.utk.edu/tenure-promotion-unit-head-resources/
  Click on the “Interfolio RPT Resources” dropdown
- Important Dates:
  | Roll Out       | May 2             |
  | Refresher Session | May 17           |
  | Office Hours | June 1 – August 17  
  |                | Every Wednesday 
  |                | 2:00 – 3:00 pm |
  | NTT Promotion | Roll out planned 
  |                | for fall        |

Contact Us

Melanie Finnegan
msfinnegan@utk.edu
(865) 974-6152

Alyssa Thom
athom2@utk.edu
(865) 974-7805

Jenn Western
jedwar75@utk.edu
(865) 974-9784