Interfolio Workflow Quick Reference – Colleges Without Departments

CASE CREATION: Department Staff Case Facilitator
- Create case
- Notify candidate
- Upload documents & lock administrator sections
- Dean begins external evaluation process
- Candidate begins building dossier

DOSSIER BUILDING: Candidate
- Complete Cover Sheet
- Upload documents
- Review all sections
- Complete Signature Statement
- Submit all sections

STEP 1: College Staff Case Facilitator
- Check for completion and correctness
- Send case to next step

STEP 2: College Review Committee (CRC)
- Review case
- Upload narrative
- Complete form
- Send case to next step

STEP 3: College Staff Case Facilitator
- Check for completion and correctness
- Share DRC narrative w/candidate
- Track two-week response window
- Send case to next step

STEP 4: Intercollegiate Review Committee (ICRC)
- Review case
- Upload narrative
- Complete form
- Send case to next step

STEP 5: College Staff Case Facilitator
- Check for completion and correctness
- Share ICRC narrative w/candidate
- Track two-week response window
- Send case to next step

STEP 6: Dean
- Review case
- Upload narrative
- Complete form
- Send case to next step

STEP 7: College Staff Case Facilitator
- Check for completion and correctness
- Share Dean’s narrative w/candidate
- Track two-week response window
- Send case to next step

STEP 8: Faculty Affairs Office
- Check for completion and correctness
- Send case to next step

STEP 9: Chief Academic Officer (CAO) (Provost)
- Review case
- Upload narrative
- Complete form
- Send case to next step

STEP 10: Faculty Affairs Office
- Check for completion and correctness
- Share CAO narrative w/candidate
- Track two-week response window
- Send case to next step

STEP 11: Chancellor
- Review case
- Upload narrative
- Complete form
- Send case to next step

STEP 12: Faculty Affairs Office
- Check for completion and correctness
- Share Chancellor’s narrative w/candidate
- Send case to next step

STEP 13: Board of Trustees

STEP 14: Faculty Affairs Office
- Send notification to candidate
- Finalize and close case

These 3 steps can be happening simultaneously.

Promotion Only cases: skip steps 4 & 5.

Promotion Only cases: steps 12 & 13 do not apply.