Step-by-Step Guide for College Budget Directors
Verifying and Uploading the TCRS Form

As a College Budget Director, you will be expected to verify and upload the TCRS form that the faculty members will fill out to receive retirement credit for their time on Faculty Development Leave (FDL) to the Interfolio system.

Step 1: Verifying Form Information and Collecting Signatures

You will also be expected to verify the information on the form. All information should be known by the faculty member but should be double-checked.

It is especially important to verify that the leave dates are indicated correctly. The leave dates should be as follows:

- For those taking leave for Fall semester only, leave dates are 8/1-1/31.
- For those taking leave for Spring semester only, leave dates are 2/1-7/31.
- For those taking leave for Fall AND Spring semesters, leave dates are 8/1-7-31.

The required signatures should have already been obtained when the document reaches you outside of Interfolio. Check to make sure they are all there before uploading the document to Interfolio.

Step 2: Uploading to Interfolio

You will receive an email notifying you that the faculty member’s case has reached your step. Access the case through Interfolio’s email notification by selecting “Review.” You can also log in directly to Interfolio at tiny.utk.edu/interfolio. If you need assistance logging in to Interfolio, please see this guide.

After selecting the case you would like to review or clicking “Review” from the Interfolio notification email, you will be brought to the “Case Materials” page:

From this page, you will click “Case Details,” boxed in orange above.

Scroll down to the “Required Items” section and upload the completed TCRS form (including all applicable signatures) by clicking the “Add” button:
The default option on the window that pops-up is to select from exiting documents that you have uploaded to Interfolio (“Choose Existing”):

More than likely, you will be uploading new files, so select “Add New File:”
Add then drag and drop desired files from your computer into the window or click on “Browse to Upload” to navigate to files saved on your computer. Click “Add” to complete the upload. If you are handling multiple FDL TCRS forms, be sure you select the correct TCRS form for the faculty case for which you are uploading.
Interfolio will default to the section of the faculty’s application packet where this file should be inserted: “TCRS Form.” Please do not change this.

**Step 3: Move the Case Forward to Faculty Affairs**

Once you have uploaded the form, you will advance the case forward to Faculty Affairs for review.

To send the case forward, select “Send Case,” located at the top of the page. From the dropdown, select “Forward to Faculty Affairs Review.”

If the case needs to be returned for revisions to the Dean, you can select “Backwards to Dean Review.”
Select the checkbox next to “Send a message to the reviewers gaining access.”

A generic email message will populate and require a subject (we recommend Faculty Development Leave – Faculty Last Name). If you are returning for revisions, please list any changes that need to be made here. Select “Continue” once you have added your message.

If Applicable: Uploading a Revised TCRS Form
If the faculty member requests a revision for their FDL, they will need to update their TCRS form and re-route it through their department’s or college’s administrative support specialist for signatures from the Department Head and/or Dean and yourself as the College Budget Director.

Select “Review” from the Interfolio email and select the “Case Details” tab:
Under the “Required Items” section, you will see a section titled “TCRS Form” which will show as complete. **This section should not be edited.** Instead, upload the TCRS form that reflects the revisions in the “Updated TCRS Form” section following the upload steps detailed above.