

## 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](https://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:

The University of Tennessee - Knoxville > Cases >

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Send Case ▼ Case Options ▼

Unit: Provost Office    Template: AY 23-24 FDL Application Cycle for AY 24-25 FDL Requests (Colleges with Departments)    Status: Select Status

Case Materials Case Details 1

Search case materials by title

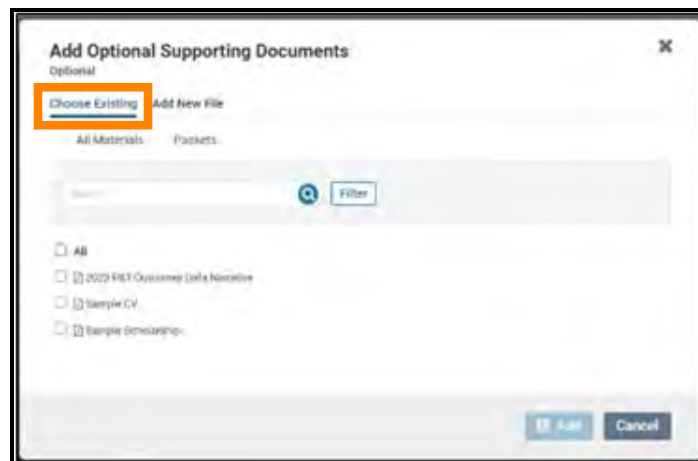
Read Case

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

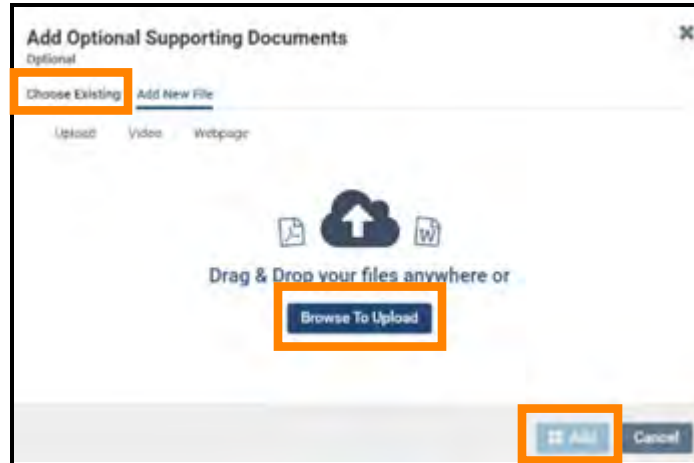
Scroll down to the “Required Items” section and upload the completed TCRS form (including all applicable signatures) by clicking the “Add” button:



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.

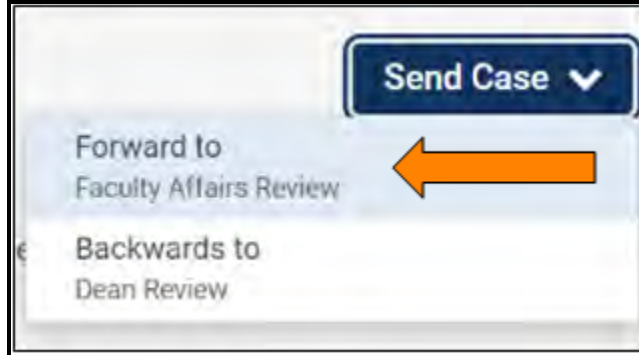
Interfolio will default to the section of the faculty’s application packet where this file should be inserted: “TCRS Form.” Please do not change this.

The screenshot shows a dialog box titled "Add TCRS Form". At the top, there are two tabs: "Upload a new file" (which is active) and "Select file from case". Below the tabs, there is a text instruction: "Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below." There are two input fields: "Name \*" with the text "Interfolio Test" and "Section \*" with a dropdown menu showing "TCRS Form". At the bottom right, there are two buttons: "Add" (highlighted with an orange box) and "Cancel".

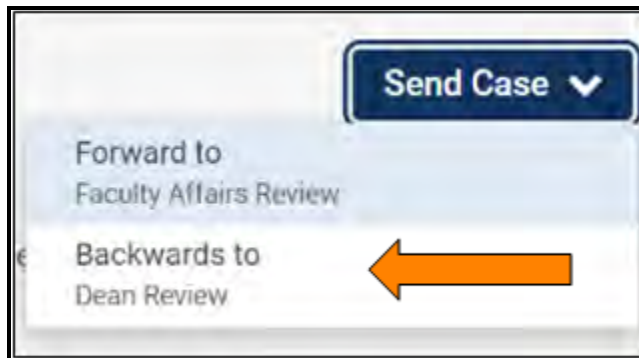
**Step 3: Move the Case Forward to Faculty Affairs**

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:

The University of Tennessee - Knoxville > Cases >

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[Send Case](#) [Case Options](#)

**Unit**  
Provost Office

**Template**  
AY 23-24 FDL Application Cycle for AY 24-25 FDL Requests (Colleges with Departments)

**Status**  
Select Status

[Case Materials](#) [Case Details](#) 1

Search case materials by title

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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.

**Required Items** 1 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

**TCRS Form** Complete

Please verify the accuracy of the form and that all signatures have been included.

Name

Interim Text

**Updated TCRS Form** Add

Please verify the updated TCRS information is accurate and complete to reflect the requested revisions. The form should be signed either physically or digitally by the faculty, department head or dean, and yourself. Once the form is complete, upload the form to the packet.

No files have been added to this section.