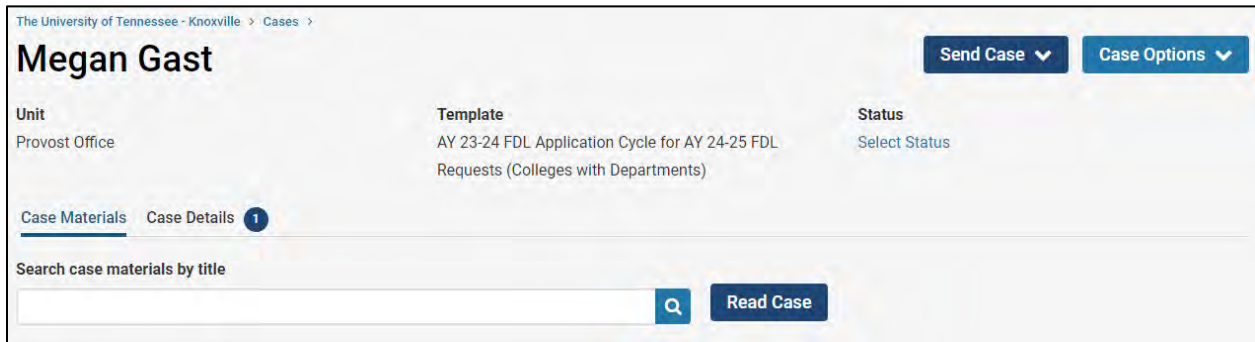## Step-by-Step Guide for Deans (Colleges with Departments) Reviewing a Candidate's FDL Application

Step 1: Review a candidate's FDL application

You will receive an email notifying you that the faculty member's case is ready for your review. 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 faculty member's case, you will be brought to the "Case Materials" tab:

Case Materials Tab: this view will allow you to review all of the candidate's materials – candidate proposal and any supporting documentation, CV, any outside support and compensation and forms. (NOTE - The TCRS form will not be uploaded until a later step and will not be available at this point.)

To review the materials, select the blue "Read Case" button shown above or drop down the section and select the document. From either option, the documents will open in a PDF format.

Step 2: Fill out the Recommendation Form

To access the recommendation form, you will need to select the "Case Details" tab.

Case Details Tab: this view will show you instructions and the required form to complete.

Select "Fill Out Form" to open the form in which you will provide your recommendation.

AY 23-24 FDL - Dean Recommendation
1 required questions   Megan Gast **(You)**   →   Fill Out Form
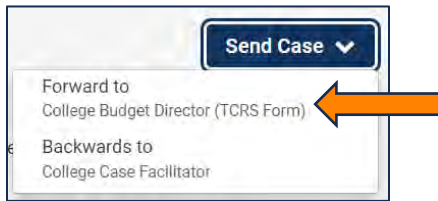
You can edit this form as many times as you like before you submit it. Just remember to click "Save Response" each time. Once you have completed the form, select "Submit Form" and then "Return to Case:"

Submit Form   Save Responses   Return to Case

Step 3: Move the Case Forward to the College Budget Director
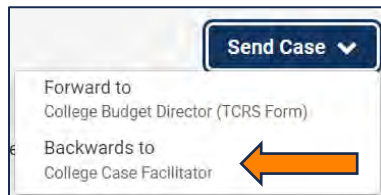
When you have completed your review of the case and completed the form, you will advance the case forward or send the case backwards if edits are needed.

At the top right of the page, select "Send Case" and "Forward to College Budget Director (TCRS Form):"

Send Case ▼
Forward to
College Budget Director (TCRS Form)   →
Backwards to
College Case Facilitator

If the case needs to be returned for revisions to the College Case Facilitator, you can select "Backwards to College Case Facilitator:"

Send Case ▼
Forward to
College Budget Director (TCRS Form)
Backwards to
College Case Facilitator   ←

From the resulting pop-up, 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 to send the case.

Send Case Forward ✖

Great job! You're sending the case forward to the next step, College Budget Director (TCRS Form). The following reviewers will lose access to the case:

College Dean/Associate Dean FA | 1 members

The following reviewers will gain access to the case:

College Budget Director | 1 members

☑ Send a message to the reviewers gaining access.

If recipients respond to this message, their response will come directly to your email inbox.

Subject *

Faculty Development Leave - Gast

Message *

Dear College Budget Director,

Please review the FDL case for Professor Gast and upload the required TCRS form. Let me know if you have any questions.

Thanks!

body p

👁 Preview   Continue   Cancel