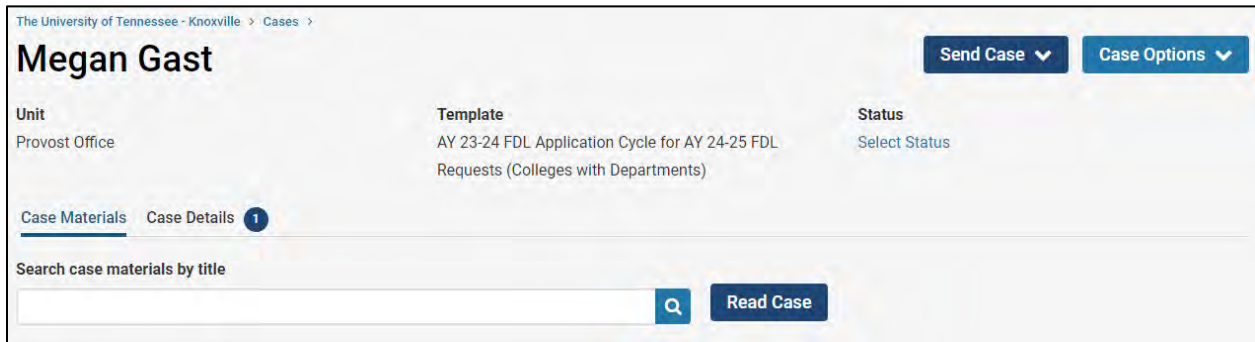


Step-by-Step Guide for Deans (Colleges with Departments) Reviewing a Candidate's FDL Application

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:



The screenshot shows the Interfolio interface for a case titled "Megan Gast". The breadcrumb trail is "The University of Tennessee - Knoxville > Cases >". The case name "Megan Gast" is prominently displayed. To the right of the name are two buttons: "Send Case" with a dropdown arrow and "Case Options" with a dropdown arrow. Below the name, there are three columns of information: "Unit" (Provost Office), "Template" (AY 23-24 FDL Application Cycle for AY 24-25 FDL Requests (Colleges with Departments)), and "Status" (Select Status). Below this information, there are two tabs: "Case Materials" (which is active and has a notification badge) and "Case Details". At the bottom, there is a search bar labeled "Search case materials by title" with a magnifying glass icon and a "Read Case" button.

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.

Candidate Packet
 Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

- > Start Here: Click the "Packet" tab above and complete Instructions and Guidelines Section Unlocked Lock
- > Candidate Proposal Unlocked Lock
- > Candidate Proposal Supporting Documentation (optional) Unlocked Lock
- > Candidate CV Unlocked Lock
- > Outside Support and Compensation (if applicable) Unlocked Lock
- > Tennessee Consolidated Retirement System (TCRS) Form Unlocked Lock
- > Terms of Leave Agreement Unlocked Lock

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.

Case Materials **Case Details** 1

Reviewing as
 College Dean/Associate Dean FA

Instructions

The dean should affirm the importance and significance of the proposed work and how it will assist the faculty in advancing their career and benefit the university. The dean will determine if any further recommendations are appropriate prior to forwarding the application to the provost.

Required Items 1 missing

All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Forms

Form Name	Assignee	Actions
AY 23-24 FDL - Dean Recommendation 1 required questions	Committee Managers	Manage Respondents
AY 23-24 FDL - Dean Recommendation 1 required questions	Megan Gast (You)	Fill Out Form

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
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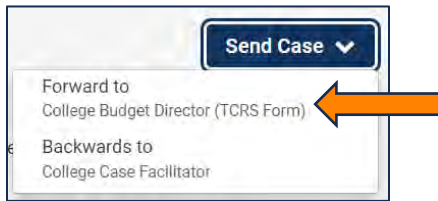
You can edit this form as many times as you like before you submit it. Just remember to click “Save Response” each time. Once you have completed the form, select “Submit Form” and then “Return to Case:”

Submit Form	Save Responses	Return to Case
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Step 3: Move the Case Forward to the College Budget Director

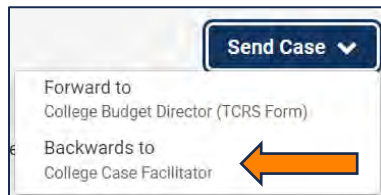
When you have completed your review of the case and completed the form, you will advance the case forward or send the case backwards if edits are needed.

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



The screenshot shows a dropdown menu titled "Send Case" with a downward arrow. Below the title, there are two sections: "Forward to" and "Backwards to". Under "Forward to", the option "College Budget Director (TCRS Form)" is selected, indicated by an orange arrow pointing to it. Under "Backwards to", the option "College Case Facilitator" is listed.

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



The screenshot shows the same "Send Case" dropdown menu. In this instance, the option "College Case Facilitator" under the "Backwards to" section is selected, indicated by an orange arrow pointing to it.

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