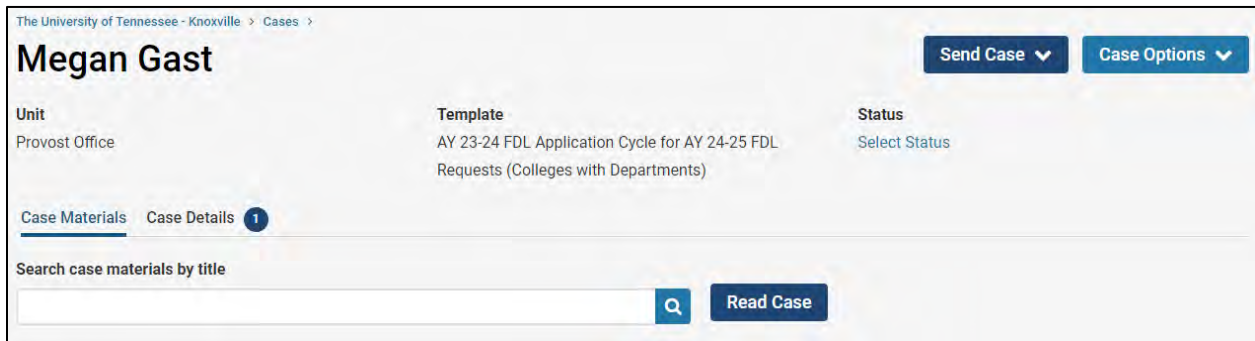# Interfolio Step-by-Step Guide for Department Heads
Reviewing a Candidate's FDL Application

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.

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`   ❷ Lock

> Candidate Proposal `Unlocked`   ❷ Lock

> Candidate Proposal Supporting Documentation (optional) `Unlocked`   ❷ Lock

> Candidate CV `Unlocked`   ❷ Lock

> Outside Support and Compensation (if applicable) `Unlocked`   ❷ Lock

> Tennessee Consolidated Retirement System (TCRS) Form `Unlocked`   ❷ Lock

> Terms of Leave Agreement `Unlocked`   ❷ 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
Department Head

∨   Instructions

The department head should assess the significance of the project, benefits for the faculty's advancement and scholarship, effects of the leave on academic programs, indicate how the faculty member's responsibilities will be met, and sign his/her statement of support. The head's recommendation and committee recommendation are then forwarded to the dean.

∨   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 - Dept Head Recommendation 5 required questions	Committee Managers	**Manage Respondents**
AY 23-24 FDL - Dept Head Recommendation 5 required questions	Jennifer Western **(You)**	**Fill Out Form**

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

AY 23-24 FDL - Dept Head Recommendation   Jennifer Western (You)   Fill Out Form
5 required questions

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 Case Facilitator

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 Case Facilitator:"

Send Case ⌄

Forward to
College Case Facilitator

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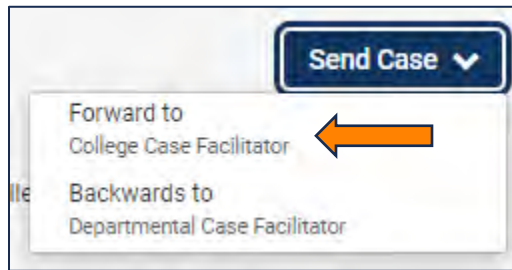
If the case needs to be returned for revisions to the Departmental Case Facilitator, you can select "Backwards to Departmental Case Facilitator:"

Send Case ⌄

Forward to
College Case Facilitator

Backwards to
Departmental Case Facilitator
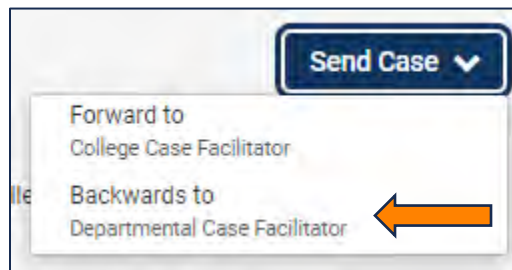
From the resulting pop-up, select the checkbox next to "Send a message to the reviewers gaining access."

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 Case Facilitator. The following reviewers will lose access to the case:

Department Head | 1 members

The following reviewers will gain access to the case:

College Case Facilitator | 0 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 - Western

Message *

Dear Case Facilitator -

Please review the FDL case for Professor Western. Let me know if you have any questions.

Thanks!

body p

👁 Preview   Continue   Cancel