Interfolio Step-by-Step Guide for Case Facilitators
FDL Case Creation for Colleges with Departments

Step 1: Create the Case

Access Interfolio by logging in at tiny.utk.edu/interfolio. If you need assistance logging in to Interfolio, please see this guide.

From the menu on the left, select “Cases” under “Review, Promotion & Tenure:”

Select “Create Case” at the top right of the page:

If you have multiple people going on leave, you may use the option to “Create Multiple Cases” under the drop-down menu.

In the resulting pop-up box, search the faculty member’s name:
Select “yes” as the candidate will be involved in the case:

Will the candidate be involved in this evaluation? *
This setting cannot be changed after this step. Learn more about candidate involvement.

- Yes, the candidate will be involved during the case.
- No

Use the dropdown menu to locate your unit’s name and select “Confirm” to confirm the selection:

Select the appropriate template for your area by clicking on the hyperlinked name:

Case Information
The Case Information page will not require any changes. You may click “Save & Continue:”
Candidate Requirements

In the Candidate Requirements section candidates will receive specific instructions on the requirements of their packet.

You can view an example candidate packet here.

Scroll to the bottom of the page and select “Continue” as no changes will need to be made.

Internal Case Section

The Internal Case Section is where the documents and forms for the candidate packet will be held. Nothing in this section should be changed. Scroll down to the bottom of the page and select “Continue.”
Step 2: Add Users to the Case Review Steps

You will be required to edit this section and add the required user at each workflow step. This will determine who receives the case at each step. The description of who should be added follows:

<table>
<thead>
<tr>
<th>Step Number</th>
<th>User</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Departmental Case Facilitator</td>
<td>This person will be responsible for filling out the Faculty Information form using data from IRIS at the department level and will check the application for completeness.</td>
</tr>
<tr>
<td>2</td>
<td>Department Head</td>
<td>The Department Head review of FDL application.</td>
</tr>
<tr>
<td>3</td>
<td>College Case Facilitator</td>
<td>This person will review the case at the college level prior to the Dean and will check the application for completeness.</td>
</tr>
<tr>
<td>4</td>
<td>Dean or Dean Proxy</td>
<td>The Dean review of FDL application.</td>
</tr>
<tr>
<td>5</td>
<td>College Budget Director</td>
<td>This person will be responsible for verifying the TCRS form information is correct and signing the form. They will also upload the correct, final version of the form.</td>
</tr>
<tr>
<td>6</td>
<td>Faculty Affairs</td>
<td>This is the Faculty Affairs staff and will already be designated for workflow.</td>
</tr>
<tr>
<td>7</td>
<td>Faculty Member taking FDL</td>
<td>Complete Faculty FDL report.</td>
</tr>
<tr>
<td>8</td>
<td>Department Head</td>
<td>The Department Head review of FDL report.</td>
</tr>
<tr>
<td>9</td>
<td>Dean or Dean Proxy</td>
<td>The College review of FDL report.</td>
</tr>
</tbody>
</table>

At each Case Review Step, select “Edit” on the right:
Select “Add Members:”

Search for the person that should be added at this workflow step:

Select “Add” to add the person to the committee and close the box:

**IMPORTANT** – For each of the nine case review steps listed above (except for the Faculty Affairs Review step, which is already completed), you will need to select the “star” next to the individual who will complete the required step, even if there is only one person at this step. If no one is starred, this step cannot be completed in the workflow.
Return to Case Review Steps:

Repeat for steps 2, 3, 4, 5, 7, 8 & 9. The Faculty Affairs Review steps are already completed. The select “Continue.”

Once you have completed building the workflow, you will see the Case Summary. Verify that each Case Review Step has a member by selecting the drop down and reviewing the information. If the Case Review Step has a person added to the committee, there will be a “(1)” next to the committee name:

If “(1)” is not indicated, that means the committee is missing a person. You will need to go back into the Case Review Steps and add the appropriate person using the steps above.

Once you have verified all information is correct, select “Return to the Case” at the top right of the page:

Step 3: Notify the Faculty Member

Finally, once all of the steps have been completed and checked, send the case to the faculty.

Select “Send Case” and “Notify Candidate:”
IMPORTANT – if you do not notify the candidate, they will not be able to upload materials or receive any shared documents.

Select “Include a personal message with the email” as this will trigger an email notification to the faculty their FDL case is ready. Once you have added your message, select “Send:”

Step 4: Move Case Forward to Departmental Case Facilitator

Once the faculty has been notified, send the case forward to the Departmental Case Facilitator so that they can assist the faculty if needed and complete the required form at that step.
Select “Send Case” and “Forward to Departmental Case Facilitator.”

The email will generate a default email message. You will need to add a subject line. (We recommend Faculty Development Leave – Faculty Last Name). Select “Continue” to send the email:
The case creation is now complete.