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:

The Case Information page will not require any changes. You may click “Save & Continue”
In the Candidate Packet Section candidates will receive specific instructions on the requirements of their packet.

You can view an example candidate packet here.

Select “Continue” as no changes will need to be made.

The Internal Case Section is where the documents and forms for the candidate packet will be held. Nothing in this section should be changed. Select “continue.”

**Step 2: Add Users to the Case Review Steps**

You will be required to edit this section and upload 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:

1. Departmental Case Facilitator – this person will be responsible for filling out the Faculty Information form using data from IRIS at the department level and should verify the information is correct.
2. Department Head Review – the department head
3. College Case Facilitator – this person will review the case at the college level prior to the Dean and should verify all information is correct.
4. Dean Review – the Dean or Dean Proxy
5. College Budget Director – 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.
6. Faculty Affairs Review – this is the Faculty Affairs staff and will already be designated for workflow
7. Faculty FDL Report – the faculty member taking FDL
8. Department Head FDL Report Review – the department head
9. College FDL Report Review – the Dean or Dean Proxy

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** – you will need to select the “star” next to the individual name responsible for completing the required step. If this is not selected, the required step will not be completed, and the case will be returned to you for corrections.
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 adding 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.

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.

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.