Step-by-Step Guide for Case Facilitators FDL Case Creation for Colleges without Departments

Step 1: Create the Case

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

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

Re	view, Promotion and Tenure
1	Cases
1	Templates
4	Administration
1	Reports
	Users & Groups

Select "Create Case" at the top right of the page:



You will select the candidate(s) for whom you are creating the case on the next page.

Choose "Select Candidates" to search for candidates:



Enter the desired candidate's name in the "Search" box, or scroll to select the desired candidate:

Sear	ch Q		
-10 0	f 2667 Results	Show 10 -	•
	Name 🛧	Unit	Î
	Douglas Aaron daaron@tennessee.edu	Mechanical Aerospace & Biomedical Engr	
	Dwight Aarons daarons@tennessee.edu	Law	
	Dean Aaser daaser1@tennessee.edu	Retail, Hospitality, and Tourism Mgmt	
	Florence Abad-Turner fabadtur@tennessee.edu	World Languages & Cultures	
	Jonathan Abbott jabbot18@tennessee.edu	The University of Tennessee - Knoxville	
Π	Emam Abdel-Fatah	Mechanical Aerospace & Biomedical Enor	
		Go to Page 1 2 3 265 266 267	>

Select the checkbox located next to the desired candidate's name and then select "Add Candidates:"

gast		×	Q				
1-1 of	1 Results				Show	10	
	Name 🛧			Unit			
	Megan Gast mgast3@tennessee.edu			The University of Tennessee - Knoxville			

Note that you can create cases for multiple candidates at a time by selecting and adding multiple candidates in this section.

Select "Continue" to move forward:



Under "Select Case Settings" you will be asked to indicate the unit for the case. From the dropdown, locate your unit's name and select it.

Unit for Case(s) *	
Cases can only be created in one unit.	
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You can also select a case type, which acts as a filter for the templates that are shown. If you choose to use this feature, you will select "Sabbatical" from the dropdown. Otherwise, you can skip this box and continue down to template selection.

Select the appropriate **template** for your area by clicking the selection circle next to the desired template:

AY 23-24 FDL Application Cycle for AY 24-25 FDL Requests (Colleges without Departments) The University of Tennessee - Knoxville Sabb	
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Select "Continue" to move onto the next step.



From the "Review & Settings" page, scroll down to the "Settings" section. Select "yes" as the candidate will be involved in the case:



For the next question, it is up to you whether you select "yes" if you prefer to notify the candidate before completing the case review steps from Step 2 to allow them to start compiling their packet materials or select "no" and notify the candidate of the case's creation after the completion of Step 2.

If you select "no", you will then select "Create 1 Case" to move forward.

Would you like to notify the candidates now? *	
An automatic notification will be sent to the candidate after the case is created with instructions for uploading and submitting materials onlin	ie.
○ Yes	
No No	

Select "Create 1 Case" to create the case:



If you select "yes," you will be asked to include a subject line (we recommend "Faculty Development Leave – Faculty's Last Name") and have an option to include a message that will accompany the notification of the case's creation.

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) No																
bject *																
Faculty Development	Lea															
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12pt ~ B	I × ²	F T	=	38		E	8	5	<u>I</u> ×	Ω	Ų	M	ß	$\langle \rangle$	0	*
Dear Faculty,																
	ment Lea	ve Reque	st case i	s now r	eady.	Please	e revi	ew th	ne ins	struct	ions	and	comp	olete	the	
Your Faculty Develop	- know if y	ou have	any que	stions.												
Your Faculty Develop requirements. Let me																
Your Faculty Develop requirements. Let me Thanks!																
Your Faculty Develop requirements. Let me Thanks!																
Your Faculty Develop requirements. Let me Thanks!																

Once you have completed the subject line and the message, select "Create 1 Case" to continue:

CREATE 1 CASE

Step 2: Add Users to the Case Review Steps

Once the case has been created, you will be brought to the "Case Materials" tab of the case:

Megan Gast		Send Case 🗸 Case Options 🗸
Unit	Template	Status
Provost Office	AY 23-24 FDL Application Cycle for AY 24-25 FDL	Select Status
	Requests (Colleges without Departments)	
Case Materials Case Details		
Search case materials by title		
	Q Read Case	

To access the case review steps, select "Case Options" and "Edit Case" from the resulting dropdown:

5	Send Case 🗸	Case Options 🗸
	Edit Case	-
	Email Candidate	
at	Add Internal Sec	tion
	View Activity Log	1
	Close Case	
	Delete Case	

Select "Case Review Steps" from the "Creating a Case" box:



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:

Step Number	User	Role
1	College Case Facilitator	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.
2	Dean or Dean Proxy	The Dean review of FDL application.
3	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.
4	Faculty Affairs	This is the Faculty Affairs staff and will already be designated for workflow.
5	Faculty Member taking FDL	Complete Faculty FDL report.
6	Dean or Dean Proxy	The College review of FDL report.

At each Case Review Step, select "Edit" on the right:

1 (College Case Facilitator Academic Level: University of Tennessee, Knox Campus Level Units Colleges Departments	Edit Delet
V	College Case Facilitator (0)	
	Includes Instructions ONO Required Documents 1 Required Form	

Select "Add Members:"

Ad Hoc Comm	ittee (0)	
Manage Members	Instructions Required Documents Required Forms Settings	
No Members		
Add Members		

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

Add Members	×
CL. Bearch waers	Sort By Name 🗸 👗 New

Select "Add" to add the person to the committee and close the box:

Add Membe	rs		,
G Gast			Sort By Name 🗸 💧 New
First Name	Last Name	Email	
Megan	Gast	mgast3@tennessee.edu	+ Add

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.

 College Case Fac Ad Hoc Committee (1) 	litator		
Manage Members Instruc	ctions Required Documents	Required Forms Settings	
🖀 1 Member			
MG Megan Gast mgast3@tennessee.edu	I	* *	
Add Members			

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:

Case Review Steps Edit 1. College Case Facilitator College Case Facilitator (1) Includes Instructions, No Required Documents

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 (if not done during Step 1)

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:"

The candidate will receive an email with instructions for uploading and submitting mate	rials online through Interfolio
Subject *	
Faculty Development Leave Request	
Message *	
$[\widehat{\mathbf{a}} \ \mathbf{B} \ I \ I_{\mathbf{x}} := := := := := := : \Omega$	
Dear Professor Western,	
Your faculty development leave request case is now ready. Please review the instructions a	nd complete the requirements. Let me know
if you have any questions.	
Thanks!	
body p	

Step 4: Move Case Forward to College Case Facilitator

Once the faculty has been notified, send the case forward to the College 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 College 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:

P

Great job! Yo	u're sending the case forward to the next step, College Case Facilitator. The following reviewers will	
lose access t	to the case:	
Case is Being	Created 0 members	
The following	g reviewers will gain access to the case:	
College Case	Facilitator 0 members	
Send a m	nessage to the reviewers gaining access.	
If recipier	ts respond to this message, their response will come directly to your email inbox.	
Subject *		
Faculty Dev	elopment Leave - Western	
Message *		
	$I I_{x} \mid := := \cdots = {\mathfrak{m}} = {\mathfrak{m}} \cap {\mathfrak{m}} {\mathfrak{m}} \Omega$	
Dear Case F	Facilitator -	
The FDL rec questions.	uest for Professor Western is ready to be reviewed. Please complete the required form. Let me know if you have any	
Thanks!		
body p		

The case creation is now complete.