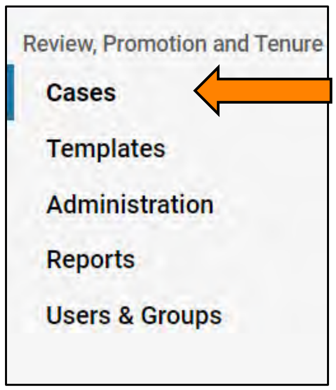
Step-by-Step Guide for Case Facilitators
FDL Case Creation for Colleges without Departments

Step 1: Create the Case

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

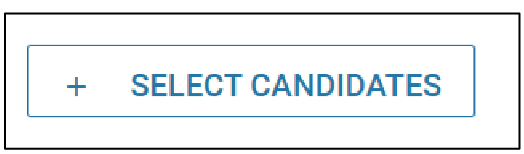
From the menu on the left, select "Cases" under "Review, Promotion & Tenure:"



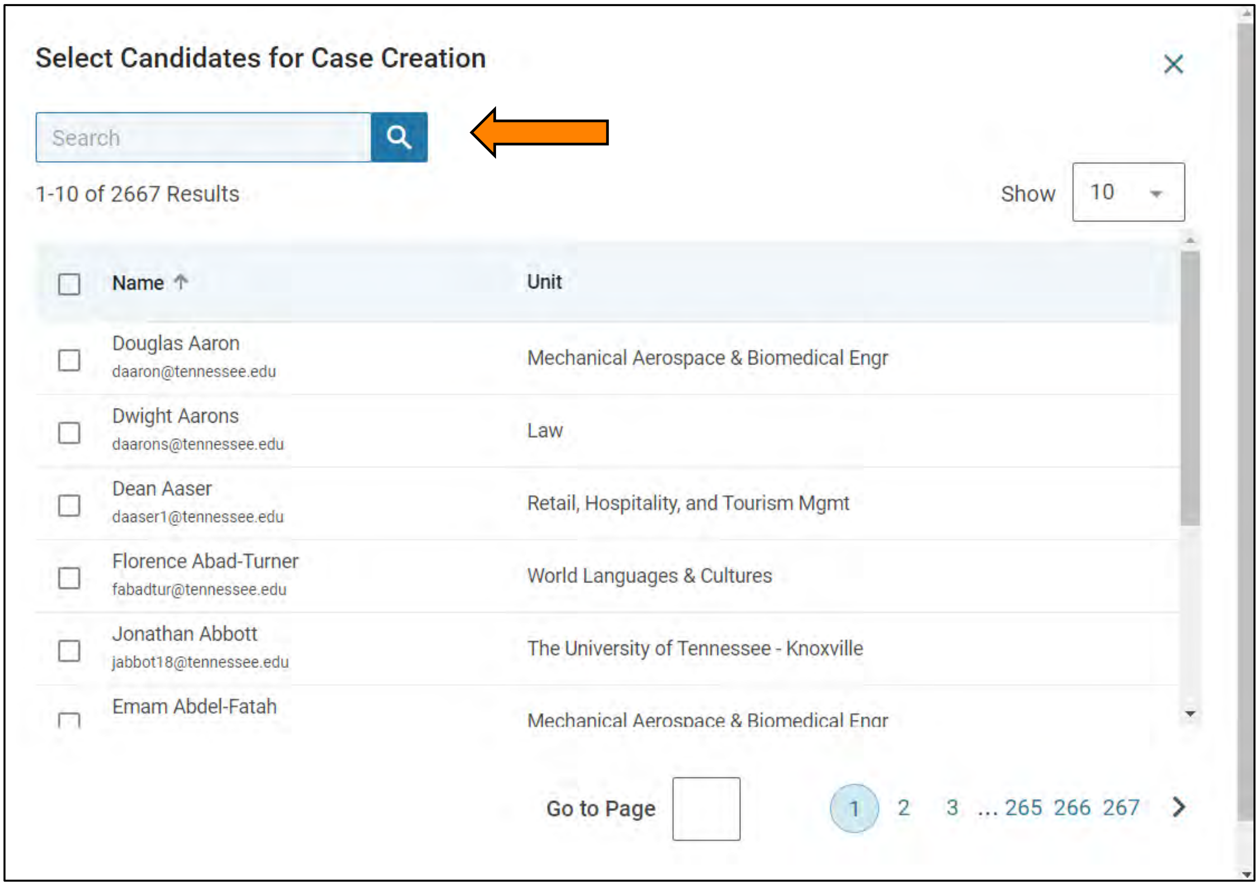
Select "Create Case" at the top right of the page:

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

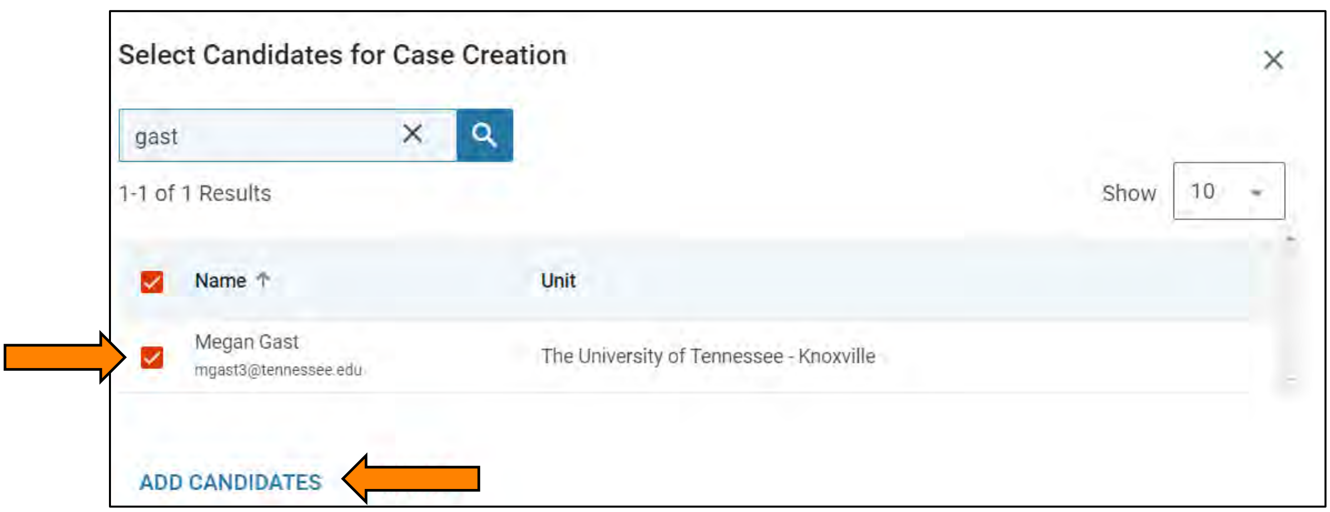
Choose "Select Candidates" to search for candidates:



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



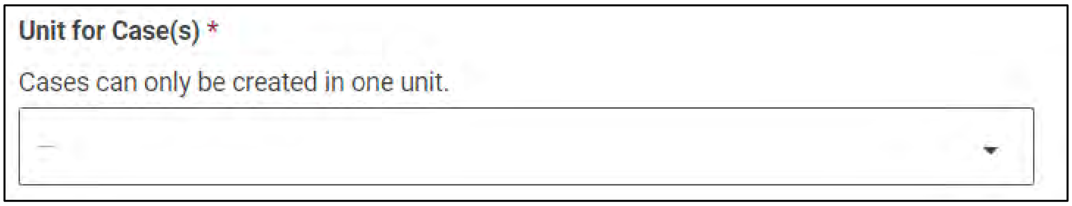
Select the checkbox located next to the desired candidate's name and then select "Add Candidates:"



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:

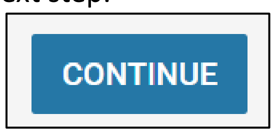
Under “Select Case Settings” you will be asked to indicate the unit for the case. From the dropdown, locate your unit’s name and select it.



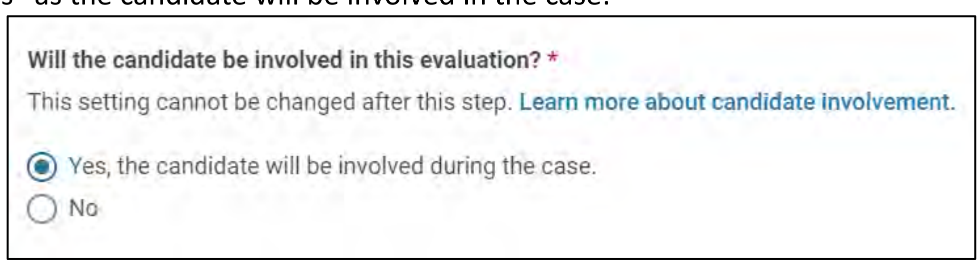
You can also select a case type, which acts as a filter for the templates that are shown. If you choose to use this feature, you will select “Sabbatical” from the dropdown. Otherwise, you can skip this box and continue down to template selection.

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

Select “Continue” to move onto the next step.

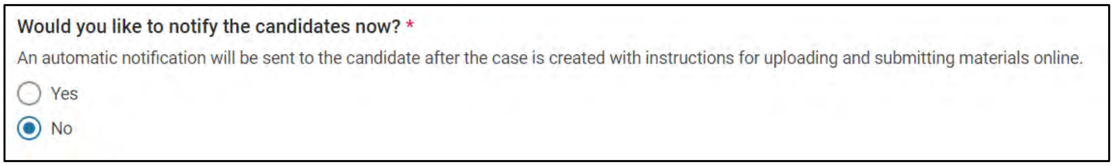


From the “Review & Settings” page, scroll down to the “Settings” section.
Select “yes” as the candidate will be involved in the case:

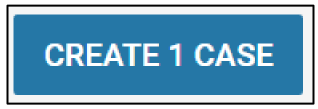


For the next question, it is up to you whether you select “yes” if you prefer to notify the candidate before completing the case review steps from Step 2 to allow them to start compiling their packet materials or select “no” and notify the candidate of the case’s creation after the completion of Step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

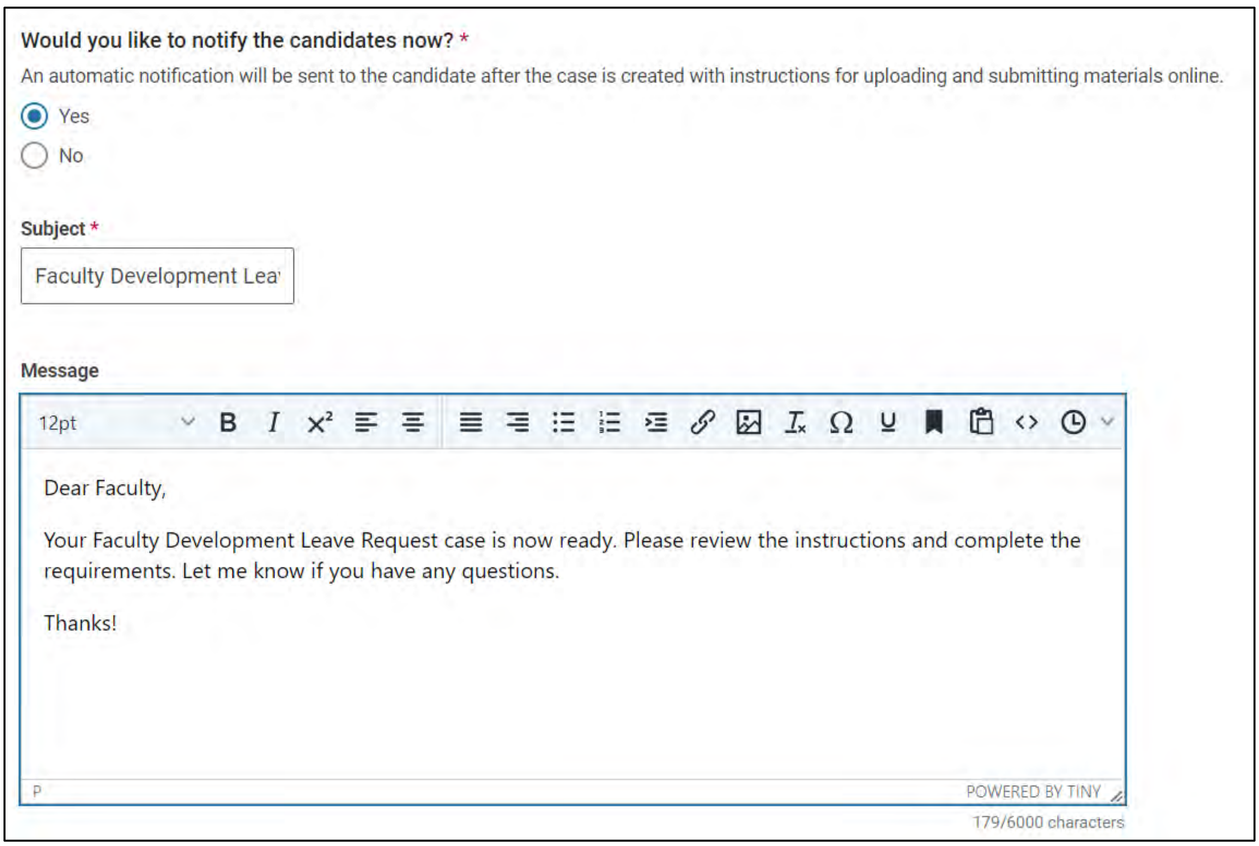
If you select “no”, you will then select “Create 1 Case” to move forward.



Select “Create 1 Case” to create the case:



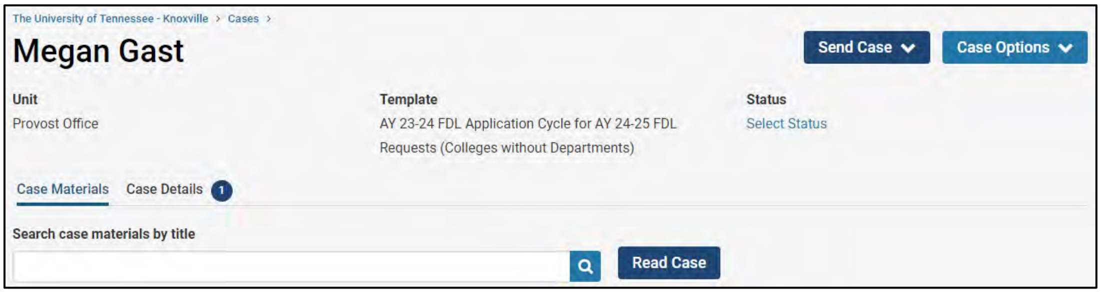
If you select “yes,” you will be asked to include a subject line (we recommend “Faculty Development Leave – Faculty’s Last Name”) and have an option to include a message that will accompany the notification of the case’s creation.



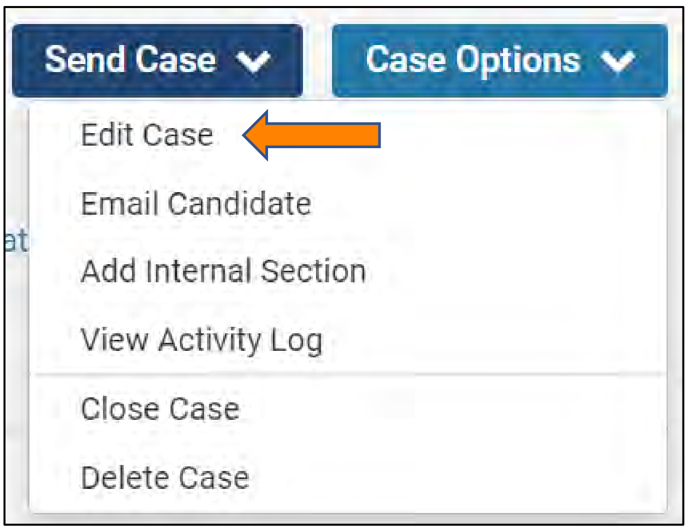
Once you have completed the subject line and the message, select “Create 1 Case” to continue:

Step 2: Add Users to the Case Review Steps

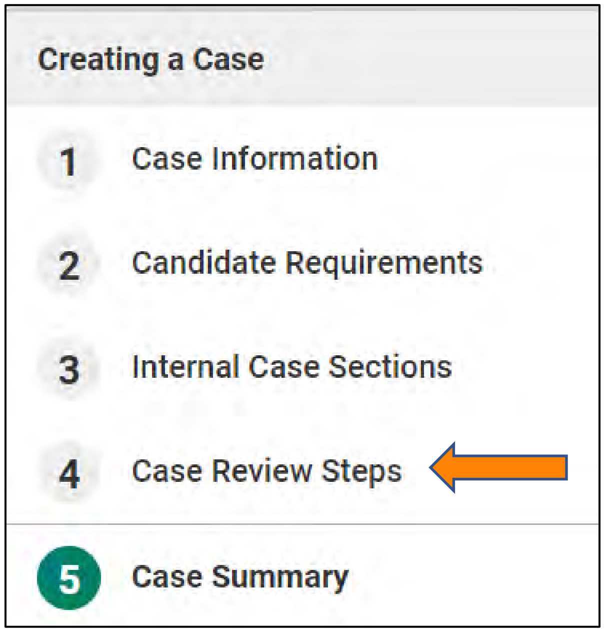
Once the case has been created, you will be brought to the “Case Materials” tab of the case:



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



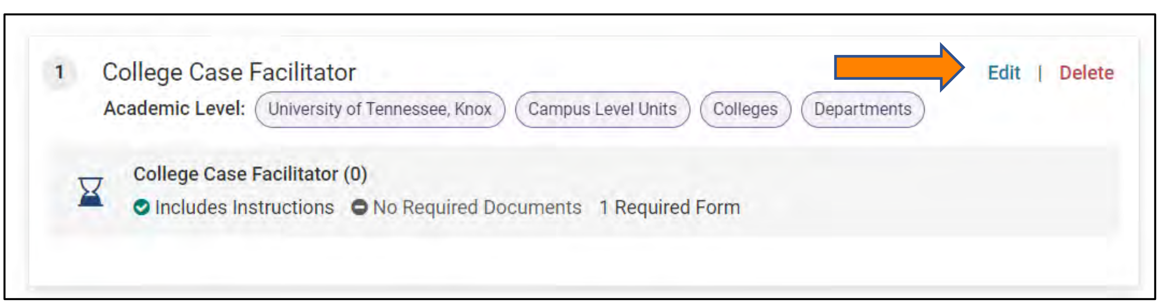
Select “Case Review Steps” from the “Creating a Case” box:



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:

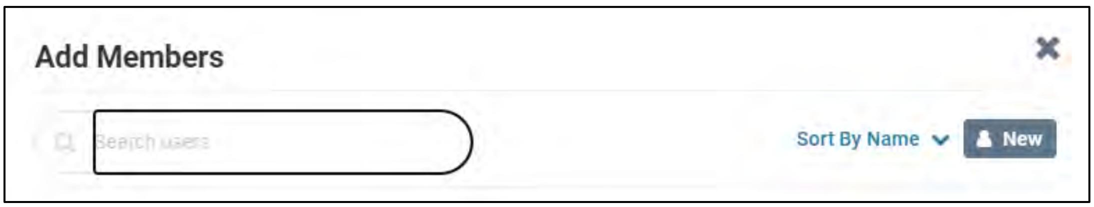
Step Number	User	Role
1	College Case Facilitator	This person will be responsible for filling out the Faculty Information form using data from IRIS at the department level and will check the application for completeness.
2	Dean or Dean Proxy	The Dean review of FDL application.
3	College Budget Director	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:

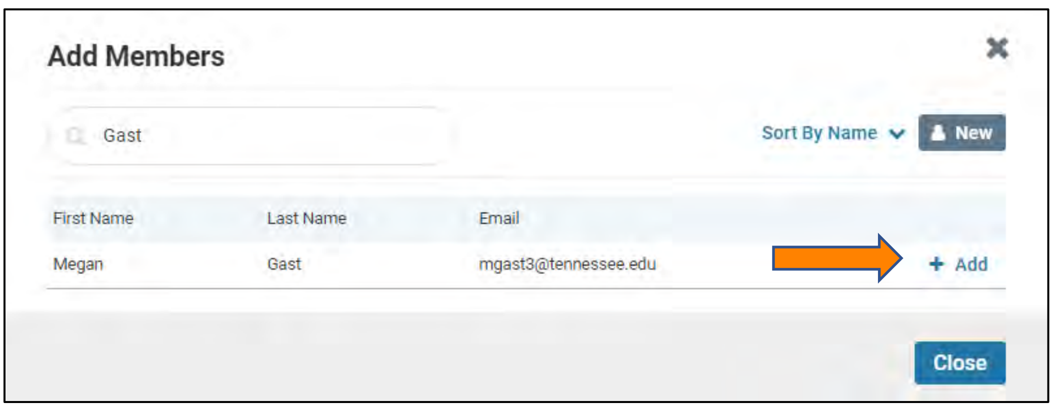


Select "Add Members:"

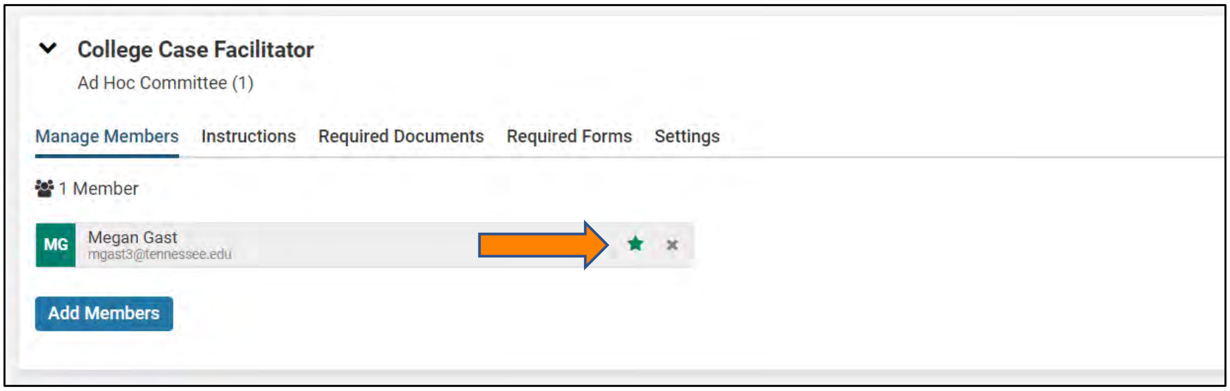
Search for the person that should be added at this workflow step:



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.



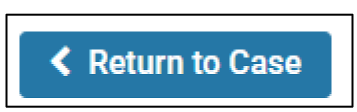
Return to Case Review Steps:

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.

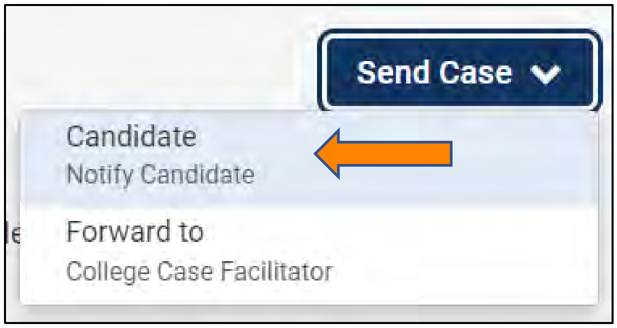
Once you have verified all information is correct, select "Return to the Case" at the top right of the page:



Step 3: Notify the Faculty Member (if not done during Step 1)

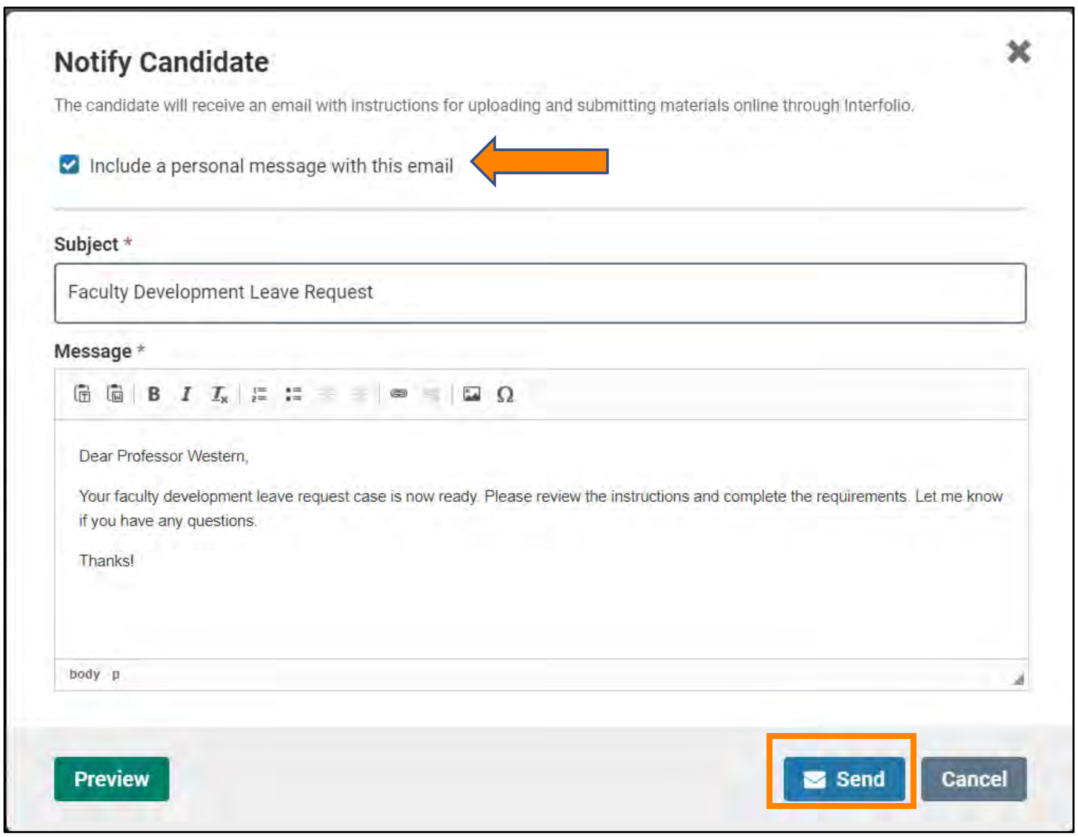
Finally, once all of the steps have been completed and checked, send the case to the faculty.

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:"

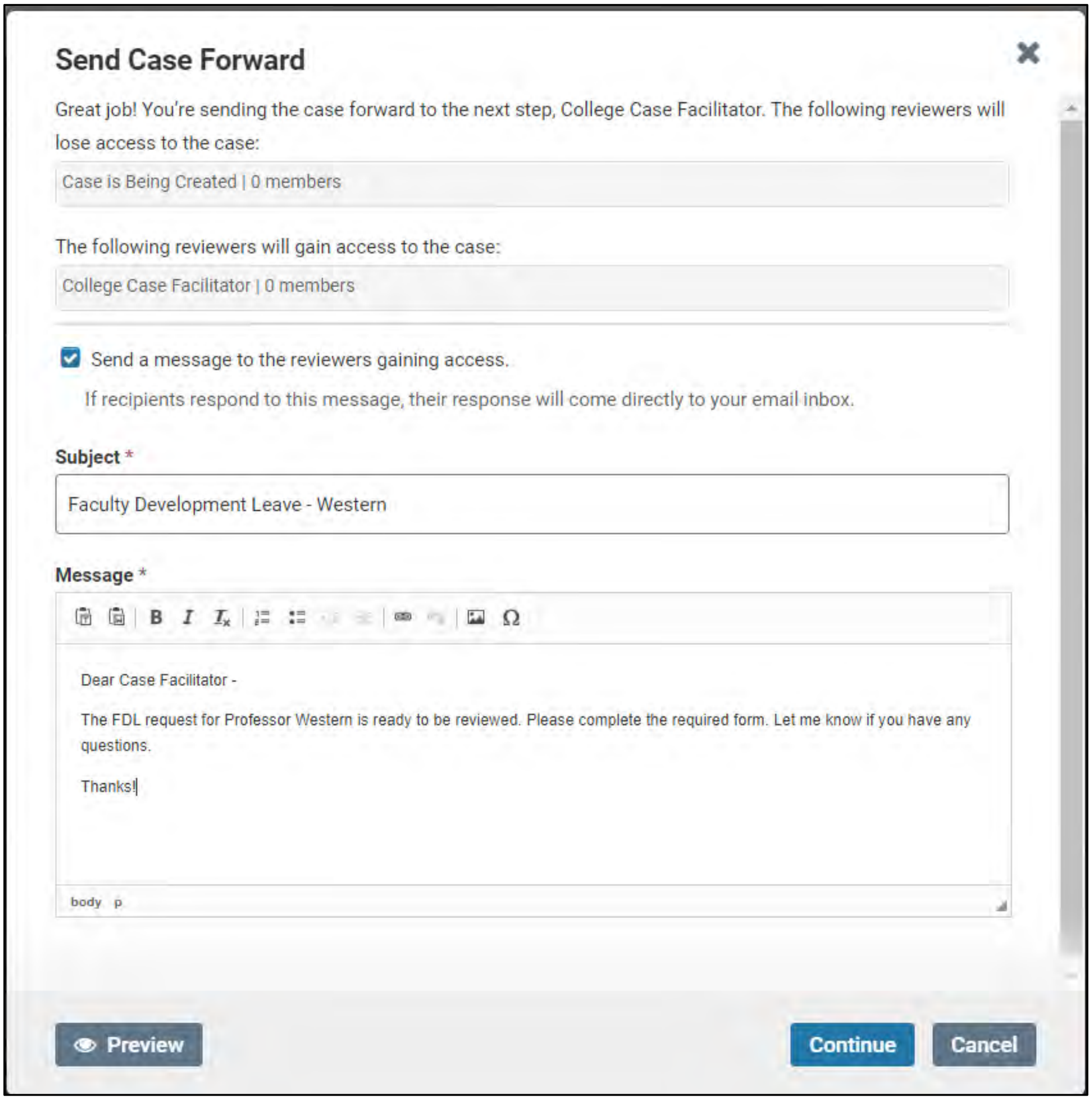


Step 4: Move Case Forward to College Case Facilitator

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:



The case creation is now complete.