# Interfolio Step-by-Step Guide for Deans (Colleges with Departments) Reviewing and Acknowledging the Candidate's Post-FDL Report

Each faculty member has digitally signed an acknowledgement that they will turn in an FDL report *within* **30** *days of returning from their leave*. The Department Head will review and approve the report before moving it along to you for your review.

When the Department Head approves the faculty member's FDL report, they will move it forward for your review. You can access the report by clicking on "Review" in the email you will receive letting you know the report is ready for your review. You can also log directly in to Interfolio at <u>tiny.utk.edu/interfolio</u>. If you need assistance logging in to Interfolio, please see <u>this guide</u>.

### Step 1a: Review the Report via "Internal Sections"

By clicking the link in the email or by selecting the faculty member's name from your home page, you will be brought to the "Case Materials" tab:

The University of Tennessee - Knoxville > Cases > Megan Gast		Send Case 🗸 Case Options 🗸
Unit Provost Office	Template AY 23-24 FDL Application Cycle for AY 24-25 FDL Requests (Colleges with Departments)	Status Select Status
Case Materials Case Details	Requests (Colleges with Departments)	
Search case materials by title	Q Read Case	

From the "Case Materials" tab, you will scroll down to "Internal Sections," located beneath the Candidate Packet materials. To view the report, expand the "Faculty End of Leave Report" section:

received sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections 2 shared with the candidate by an administrator or committee manager.	
You are asked to submit required items as part of this case. View	
> TCRS Form	Edit Add File
> Departmental Recommendation	Edit Add File
College Recommendation	Edit Add File
> Faculty Affairs	Edit Add File
Faculty End of Leave Report	Edit Add File

From the expanded "Faculty End of Leave Report" section, click on "AY 23-24 FDL – Report" to view the report.

Faculty End of Leave Report		Edit Add File
Materials		
No files have been added to this section.		
Committee Forms		
Title	Details	Actions
AY 23-24 FDL - Report   Step 7: Faculty	Last Response Submitted Jun 23, 2023	Edit

You will need to scroll to the second page of the document to read the report.

Page 1:





Megan Gast				0	Return to Ce 🔍
=			📥 Download	Sealart	Search
Packet Annotations     START HERE: CLICK THE PACKET TAB ABOVE AND     COMPLETE INSTRUCTIONS AND GUIDELINES SECTION     CANDIDATE PROPOSAL     CANDIDATE PROPOSAL SUPPORTING DOCUMENTATION     (OPTIONAL)     CANDIDATE CV     OUTSIDE SUPPORT AND COMPENSATION (IF     APPLICABLE)     TENNESSEE CONSOLIDATED RETIREMENT SYSTEM     (TCRS) FORM     TERMS OF LEAVE AGREEMENT     TCRS FORM     DEPARTMENTAL RECOMMENDATION		Member Macaum Activities and Accompliatments (60-760 words) Activities and accompliatments Activities and accompliatments Activities and Activities and accompliate Activities and Activities and Activit			
FACULTY AFFAIRS     FACULTY END OF LEAVE REPORT	X Q Q	Previous Material < 2 / 2 🔉 Next Material			

## Step 1b: Review the Report via "Read Case"

You can also access the report through clicking on the "Read Case" button:

The University of Tennessee - Knoxville > Cases > Megan Gast		Send Case 🗸	Case Options 🗸
Unit Provost Office	Template AY 23-24 FDL Application Cycle for AY 24-25 FDL Requests (Colleges with Departments)	Status Select Status	
Case Materials Case Details 1			
Search case materials by title	Q Read Case		

A similar window as above will open; however, it will default to the first page of the Candidate Packet, rather than only displaying the desired section.

From the opening page, you will need to scroll down to the Packet section labeled "Faculty End of Leave Report:"

07/06/2023



Click on "Faculty End of Leave Report" to expand the section and then click on "AY 23-24 FDL – Report | Faculty FDL Report" to view the report.

### Step 2: Acknowledging the Report

Once you have reviewed the report, you will select "Return to Case" from the top right-hand corner:

Megan Gast		⇒ ∎	G Return to Case
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You will be brought back to the "Case Materials" tab:



Select "Case Details" to be brought to the page where you can access the form.

eviewing as		
epartment Head FDL Report		
<ul> <li>Instructions</li> </ul>		
Please review the faculty FDL report and advance to the next ste please return to the faculty member for changes.	ep as acknowledgement that you have receiv	red and reviewed the report. If you feel the report needs editing
(C) Production		1 missir
V Required items		
<ul> <li>Required items</li> <li>All required items must be completed before the case can advance to the omit the form as a requirement for a user.</li> </ul>	e next step. Forms must be completed by the assig	ned user, however a Committee Manager or Administrator can select t
Required items All required items must be completed before the case can advance to the omit the form as a requirement for a user. Forms	next step. Forms must be completed by the assig	ned user, however a Committee Manager or Administrator can select t
<ul> <li>Required items</li> <li>All required items must be completed before the case can advance to the omit the form as a requirement for a user.</li> <li>Forms</li> <li>Form Name</li> </ul>	next step. Forms must be completed by the assignee	ned user, however a Committee Manager or Administrator can select t Actions
Required items     All required items must be completed before the case can advance to the     omit the form as a requirement for a user.     Forms     Form Name     AY 23-24 Department Head and/or Dean Approval of FDL Report     1 required questions	next step. Forms must be completed by the assignee Assignee Committee Managers	ned user, however a Committee Manager or Administrator can select t Actions Manage Respondents

Click on "Fill Out Form" to launch the form.

You will be asked whether you approve the report.

- If you approve the report, you can use the "Additional Explanation" box for any comments you may have.
- If you do not approve the report, indicate why in the "Additional Explanation" box.

You can edit this form as many times as you like before you submit it. Just remember to click "Save Responses" each time.

To submit the form, select "Submit Form" and "Yes" on the resulting pop-up to return to case.



### Step 3: Send the Case Forward or Backward

If you approve the report, you will move the case forward to VPFA's review.

Select "Send Case" on the top right side of the screen and then select "Forward to VPFA Final Review:"

	Send Case 🗸
Forward to /PFA Final Review	
Backwards to Department Head FDL	Report Review

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 Report – Faculty Last Name). Include your message and select "Continue" to send the case.

Great job	You're sending the case forward to the next step, VPFA Final Review. The following reviewers will los
access to	b the case:
College I	DL Report Review   1 members
The follo	wing reviewers will gain access to the case:
VPFA Co	mmittee   2 members
Senc	a message to the reviewers gaining access.
If reci	pients respond to this message, their response will come directly to your email inbox.
Subject *	
Faculty	Development Leave Report - Gast
Message	*
8 8	$ \mathbf{B} \ \mathbf{I} \ \mathbf{I}_{\mathbf{x}} \   \ \mathbf{I}_{\mathbf{x}} \   \ \mathbf{I}_{\mathbf{x}} \ = \ \mathbf{I}_{\mathbf{x}} \   \ \mathbf{I}_{\mathbf{x}} \ = \ \mathbf{I}_{\mathbf{x}} \   \ \mathbf{I}_{\mathbf{x}} \$
Dear Fa	aculty Affairs,
The FD	L report for Professor Gast is ready to be reviewed. Let me know if you have any questions.
Thanks	(
body p	

**If you do not approve the report**, you can send the report back to the faculty member via the Department Head to ask for revisions.

Select "Send Case" on the top right side of the screen and then select "Backward to Faculty FDL Report:"



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 Report – Faculty Last Name). Please list any changes that need to be made here. Select "Continue" once you have added your message to send the case.

end Case Dackward	×
ou're sending the case backward to the previous step, Department Head FDL Report Review. The foll vviewers will lose access to this case:	owing
College FDL Report Review   1 members	
he following reviewers will gain access to the case:	
Department Head FDL Report   1 members	
Send a message to the reviewers gaining access.	
If recipients respond to this message, their response will come directly to your email inbox.	
ubject *	
Faculty Development Leave Report - Gast	
lessage * Β Β Ι Ι <sub>χ</sub>   2= == -=   == -,   Ξ Ω	
Dear Department Head	
I request the following revisions from Professor Gast by (Due Date).	
List of revisions.	
List of revisions. Let me know if you have any questions.	
List of revisions. Let me know if you have any questions. Thanks!	

Once the faculty member completes the revisions to your satisfaction, you will select "Edit Submission" to change your answer on the form to reflect your approval.

<ul> <li>Required items</li> </ul>		
All required items must be completed before the case can advance to the omit the form as a requirement for a user.	e next step. Forms must be completed by the assig	gned user, however a Committee Manager or Administrator can select to
Form Name	Accimpa	Actions
AY 23-24 Department Head and/or Dean Approval of FDL Report 1 required questions	Committee Managers	Manage Respondents

After submitting the revised form, move the case forward to VPFA's review using the steps detailed above in the "If you approve the report" subsection above.