Interfolio Step-by-Step Guide for Deans (Colleges without Departments) Reviewing and Acknowledging a 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*.

When the faculty member completes their 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 without Departments)	Status Select Status	
Case Materials Case Details			
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:

Internal Sections	
These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Plea be shared with the candidate by an administrator or committee manager.	ase note that some materials added to internal sections can
be shared with the candidate by an automistration of 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
 For the Million 	
> 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 Affairs		Edit Add File
Faculty End of Leave Report		Edit Add File
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:

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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 COLLEGE RECOMMENDATION		AY 23-24 FDL - Report Gardiate Name Nage Gard Responses from Bot P frage Control Responses Submitted Name Markit (Brannesson indu	Role Details Maniagar Submitted Jun 23, 2023 ef 3.36 PM			
> FACULTY AFFAIRS						_
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Page 2:

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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 TGRS FORM DEPARTMENTAL RECOMMENDATION COLLEGE RECOMMENDATION FACULTY AFFAIRS		Member Maga Gast Account of Major Activities and Accompliabments (505-700 words) Activities and accompliabments Account of Experience (205-000 words) Account of Experience (205-000 words) Falture priors			
✓ FACULTY END OF LEAVE REPORT	XQQ	Previous Material X 2 / 2 > Next Material			

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

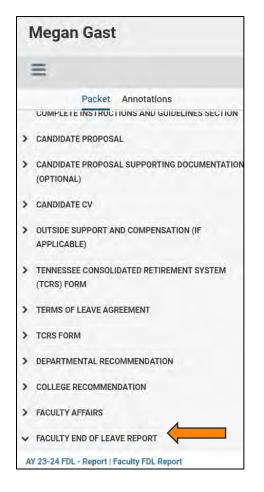
You can also access the report through clicking on the "Read Case" button

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 without 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



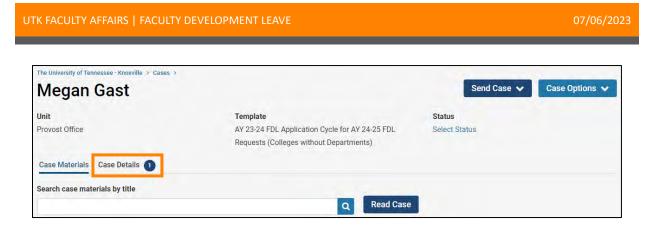
Click on "Faculty End of Leave Report" to expand the section and then click on "AY 23-24 FDL – Report | Faculty FDL Report" to view the report.

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 C	ase
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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		
ollege FDL Report Review		
 Instructions 		
Please review the faculty FDL report and advance to the next step please return to the faculty member for changes.	p as acknowledgement that you have recei	ved and reviewed the report. If you feel the report needs editin
Required Items		1 missir
All required items must be completed before the case can advance to the onit the form as a requirement for a user.	next step. Forms must be completed by the assig	gned user, however a Committee Manager or Administrator can select t
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	next step. Forms must be completed by the assignes	gned user, however a Committee Manager or Administrator can select t Actions
All required items must be completed before the case can advance to the omit the form as a requirement for a user. Forms		

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 Faculty Affairs review.

Select "Send Case" on the top right side of the screen and then select "Forward to VPFA Final 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	I're sending the case forward to the next step, VPFA Final Review. The following reviewers will lose	
access to the		
College FDL F	teport Review 1 members	
The following	reviewers will gain access to the case:	
VPFA Commit	ttee 2 members	
🔽 Send a m	essage to the reviewers gaining access.	
If recipien	ts respond to this message, their response will come directly to your email inbox,	
Subject *		
Faculty Deve	elopment Leave Report - Gast	
Message *		
@ @ B	I $I_{\rm x}$; ;; ;; ; = $ = = = \Omega$	
Dear Faculty	Affairs,	
The FDL rep	ort for Professor Gast is ready to be reviewed. Let me know if you have any questions.	
Thanksl		
body p		4

If you do not approve the report, you can send the report back to the faculty member 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). If you are returning for revisions, please list any changes that need to be made here. Select "Continue" once you have added your message to send the case.

You're sending the case backward to the	previous step, Faculty FDL Report. The following reviewers will lose	
access to this case:		
College FDL Report Review 1 members		
The following reviewers will gain access	to the case:	
Faculty 1 members		
Send a message to the reviewers ga	ining access.	
If recipients respond to this message	e, their response will come directly to your email inbox.	
Subject *		_
Faculty Development Leave Report - Ga	ast	
Message *		
B I I _x 2 := − −		
Dear Faculty,		
Please make the following revisions and re-su	bmit the report by (Due Date).	
List of revisions here.		
Let me know if you have any questions.		
Thanksl		
body p		à

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.

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
Forms		
Form Name	Assignee	Actions
AY 23-24 Department Head and/or Dean Approval of FDL Report	Committee Managers	Manage Respondents
1 required questions		

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