

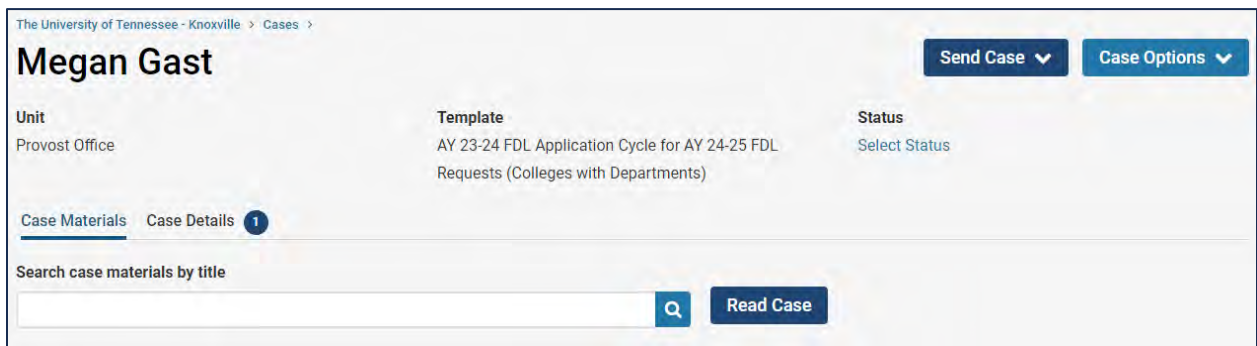
Interfolio Step-by-Step Guide for Department Heads Reviewing and Acknowledging a Candidate’s Post-FDL Report

Each faculty member has digitally signed an acknowledgement that they will turn in an FDL report *within 30 days of returning from their leave*.

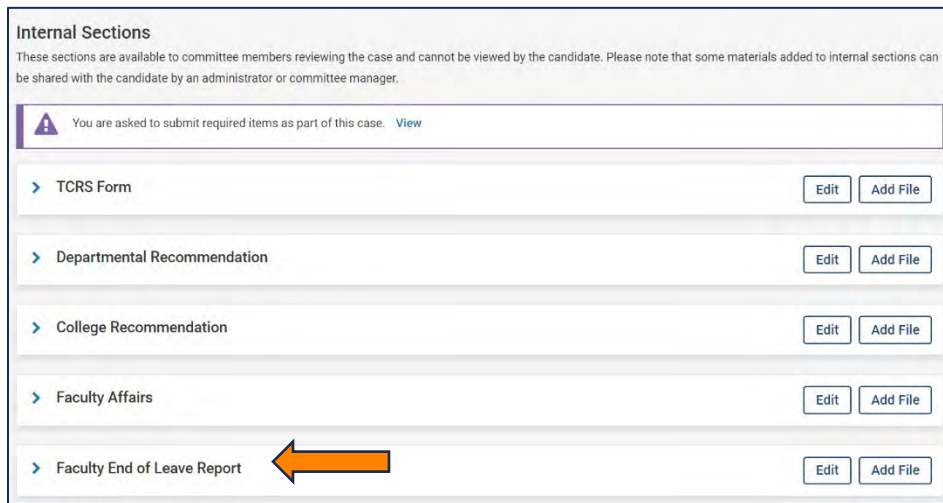
When the faculty member completes their FDL report, they will move it forward for your review. You can access the report by clicking on “Review” in the email you will receive letting you know the report is ready for your review. You can also log directly in to Interfolio at tiny.utk.edu/interfolio. If you need assistance logging in to Interfolio, please see [this guide](#).

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:



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:

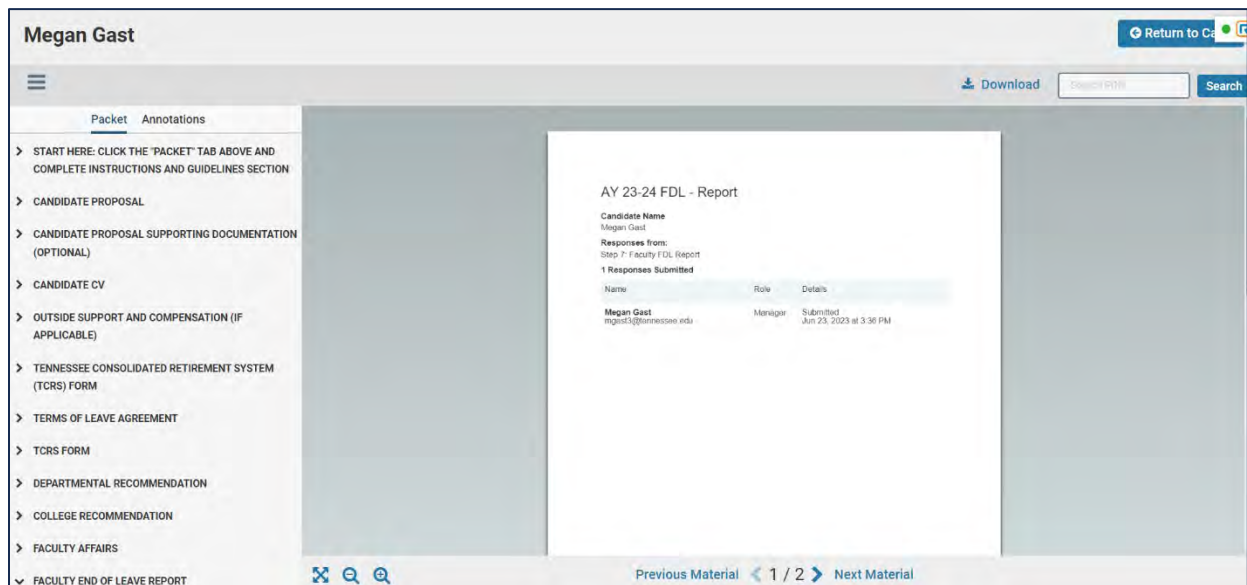


From the expanded “Faculty End of Leave Report” section, click on “AY 23-24 FDL – Report” to view the report.

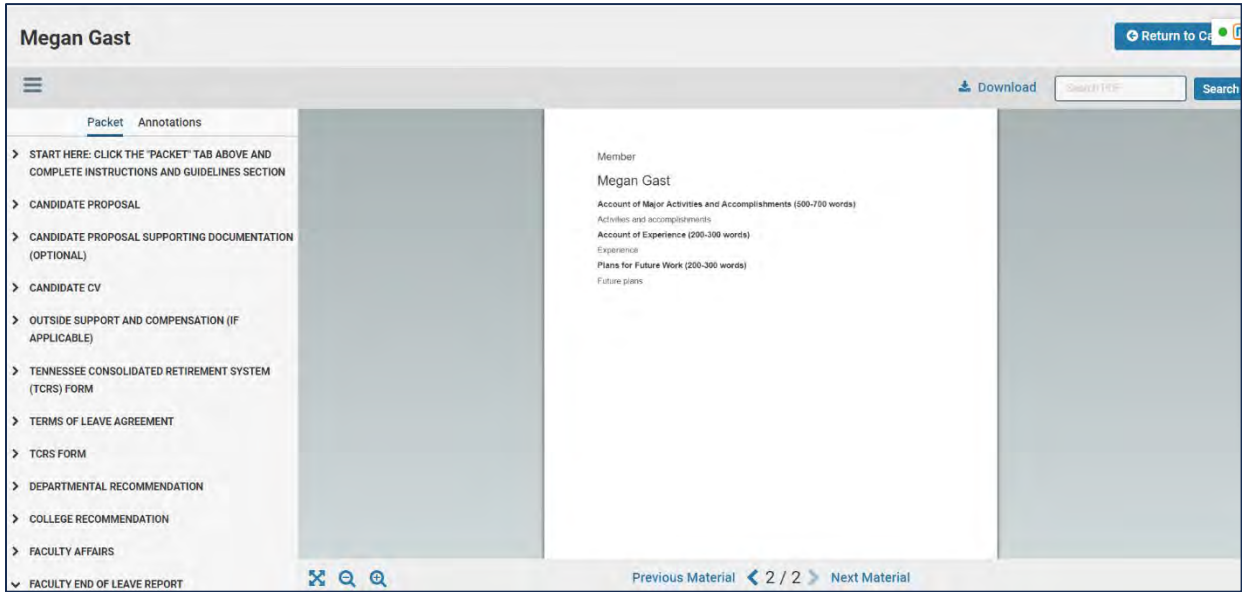


You will need to scroll to the second page of the document to read the report.

Page 1:

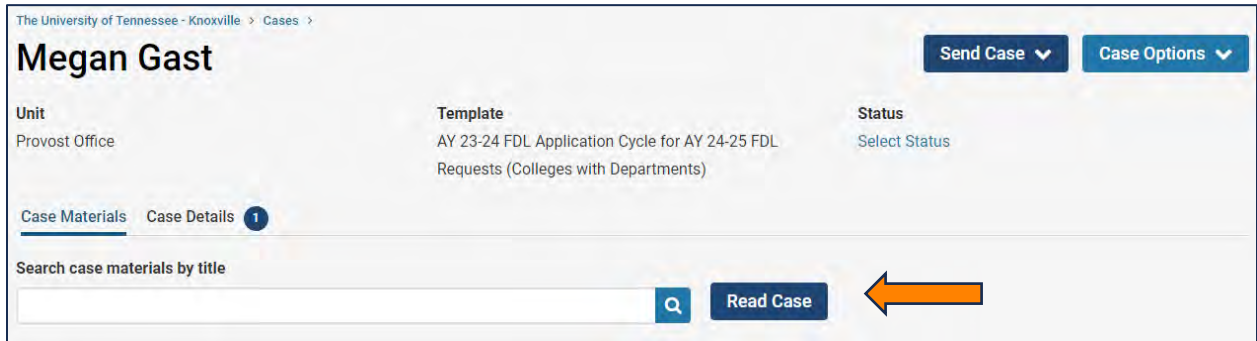


Page 2:



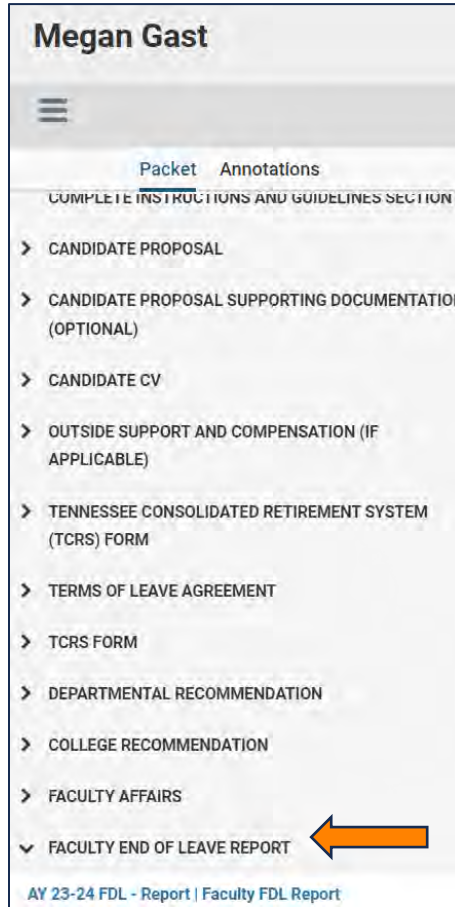
Step 1b: Review the Report via “Read Case”

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



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.

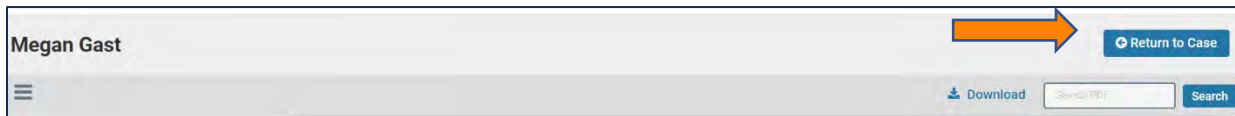
From the opening page, you will need to scroll down to the Packet section labeled “Faculty End of Leave Report:”



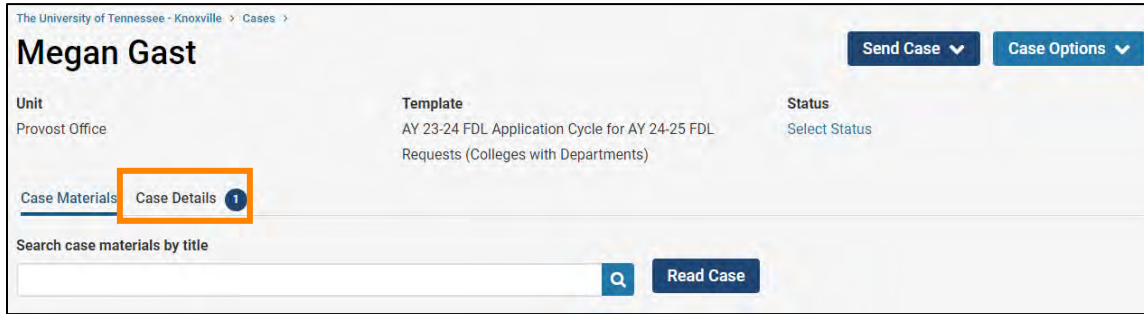
Click on “Faculty End of Leave Report” to expand the section and then click on “AY 23-24 FDL – Report | Faculty FDL Report” to view the report.

Step 2: Acknowledging the Report

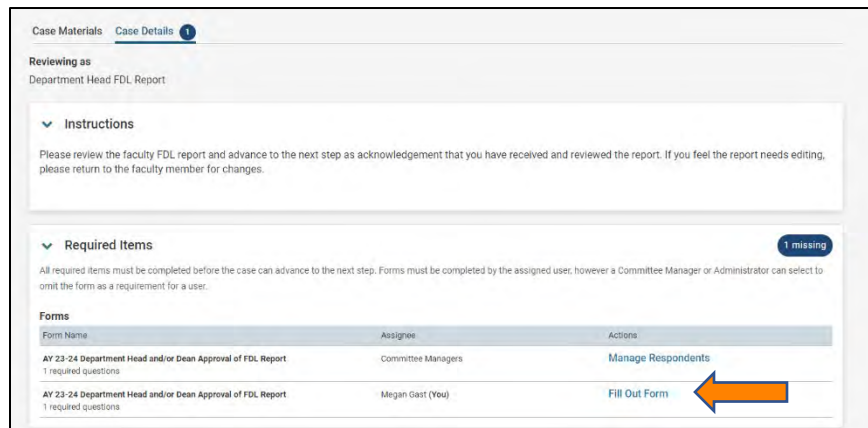
Once you have reviewed the report, you will select “Return to Case” from the top right-hand corner:



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.



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.

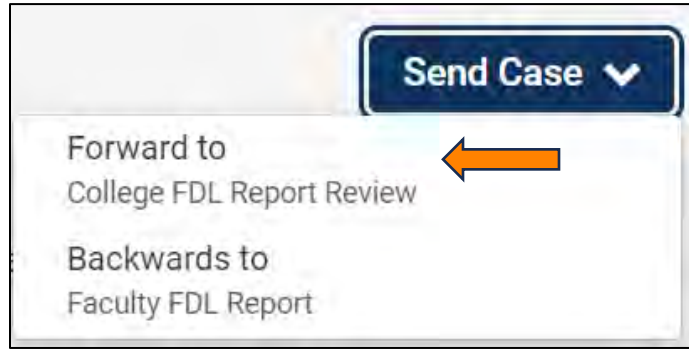
To submit the form, select “Submit Form” and “Yes” on the resulting pop-up to return to case.



Step 3: Send the Case Forward or Backward

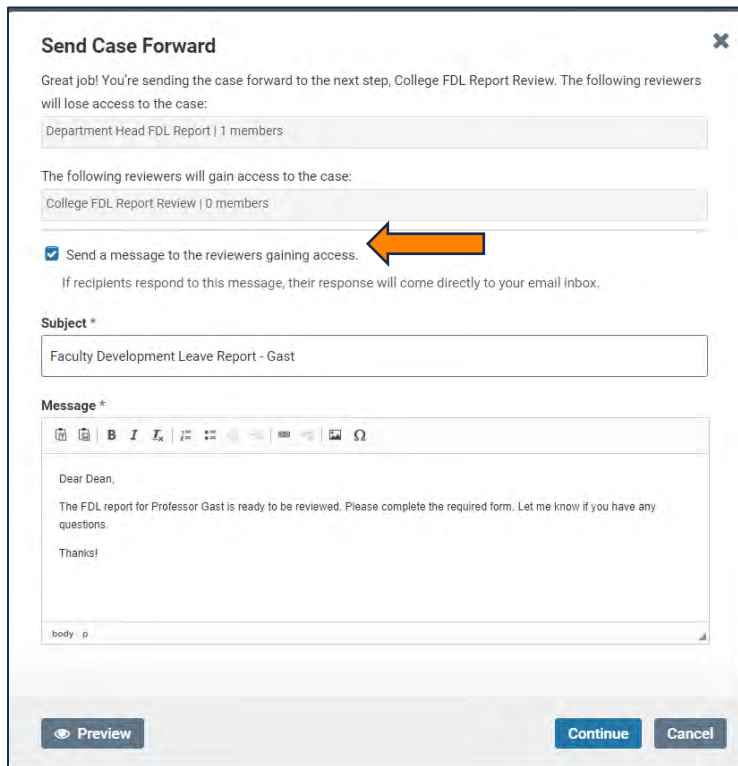
If you approve the report, you will move the case forward to the College’s review.

Select “Send Case” on the top right side of the screen and then select “Forward to College FDL Report Review:”



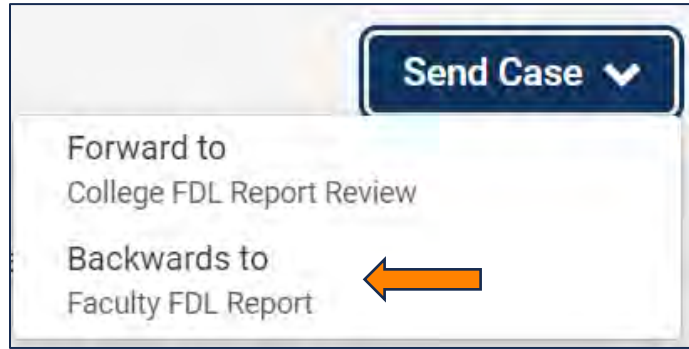
Select the checkbox next to “Send a message to the reviewers gaining access.”

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.



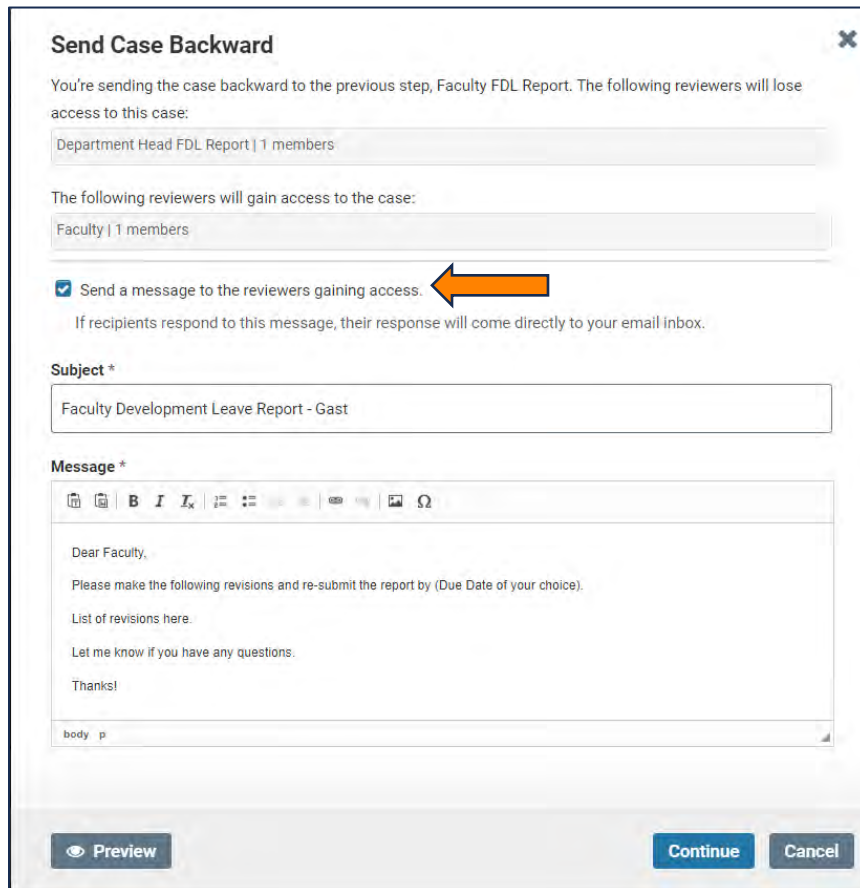
If you do not approve the report, you can send the report back to the faculty member via the Department Head to ask for revisions.

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.



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.

▼ **Required Items**
 All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Forms		
Form Name	Assignee	Actions
AY 23-24 Department Head and/or Dean Approval of FDL Report 1 required questions	Committee Managers	Manage Respondents
AY 23-24 Department Head and/or Dean Approval of FDL Report 1 required questions	Megan Gast (You)	Edit Submission 

After submitting the revised form, move the case forward to the College review using the steps detailed above in the “If you approve the report” subsection above.

If the College requests revisions

If the College would like to request revisions from the faculty member, they will move the case backward to you with the request that you move the case back to the faculty member to ask for revisions.

Follow the same procedure as you would if you were asking for revisions by moving the case backwards, sending the personalized email with what revisions are required, and the due date by which the revisions should be completed.

Once the faculty member completes their revisions and moves it forward to you, you will move the case forward again to the College FDL Report Review step.

Once the revisions are accepted by the College, the case will be moved forward to VPFA for the final review.