## Interfolio Step-by-Step Guide for Faculty
## Completing the FDL Candidate Packet

Once you have received approval from your department head to apply for Faculty Development Leave, a case will be created for you in Interfolio by an administrative support specialist in your department or college when the application period opens in the fall semester.

You will receive an email notification when you case has been created. To access your case, following the link in the email. You can also log in directly to Interfolio at http://tiny.utk.edu/interfolio. If you need assistance logging in to Interfolio, please see this guide.

When you log in, you will see the following default view ("Overview"). This view provides a dashboard of items you need to provide and visual indicators of your progress. **The visuals are not always helpful since they will show optional items as being complete**.



The "Packet" view (see "Packet" tab next to "Overview" tab) provides more information about what is needed in each section and allows you to upload files and complete required forms. We recommend you work in the "Packet" view. You will need to change to this view each time you log in since "Overview" is the default view. Clicking on "Edit" will also take you to the "Packet" view:

The "Preview Packet" button will compile all the files you upload and forms you complete into a single document and launch a PDF-type viewer. From this viewer, you can download a copy of your packet. This viewer is only helpful once you have completed sections of the packet. Clicking "View Instructions" will display brief instructions; the more comprehensive instructions are presented as the first step in the application.

**Step 1: Review Instructions and Guidelines Section**

Your first step is to review the instructions and guidelines section, which is the first section of the packet ("Start Here: Click the "Packet" tab above and complete Instructions and Guidelines Section"):

These instructions are only visible from the "Packet" view. These instructions provide information about completing and submitting your packet. They also explain the Interfolio interface features you will need to use to build and submit your case.

You will be asked to complete an acknowledgement form found at the bottom of the section after you've reviewed the instructions. Click on "Fill Out Form:"
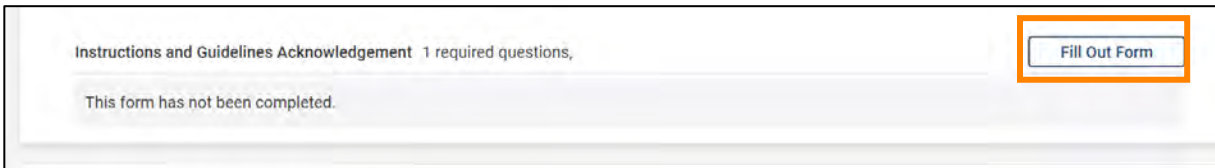


Complete the acknowledgement form that opens. Be sure to click "Save Response" at the bottom of the form. Once you have saved your response to this form, select "Return to Packet" to continue working on your application:
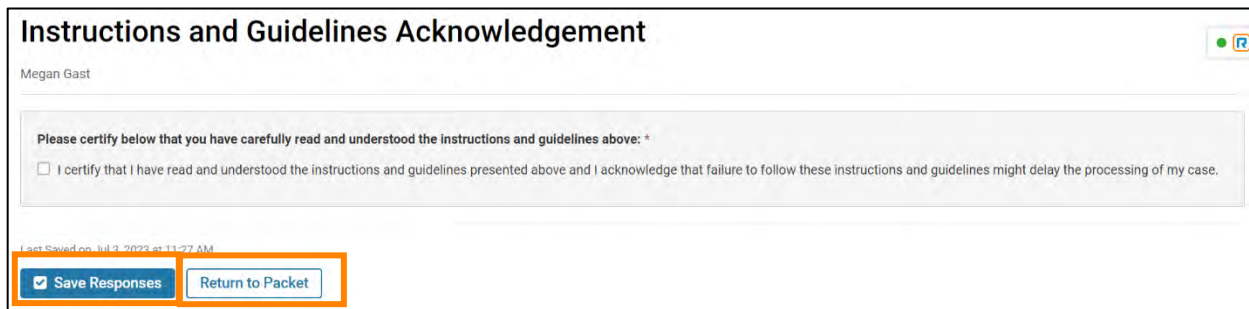


**Step 2: Candidate Proposal**

The main part of your application is the candidate proposal. Please open and review this form before starting your proposal since it identifies the different pieces of information you will need to provide.
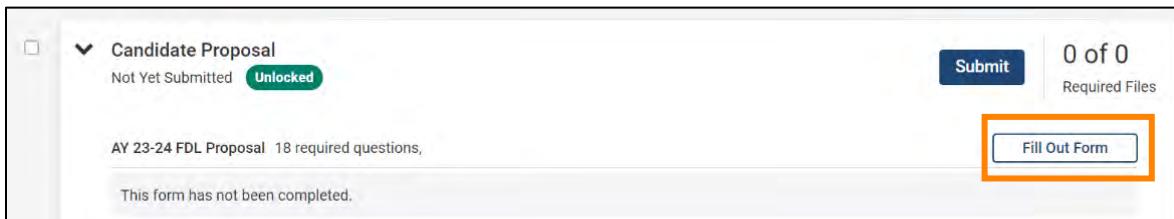


In addition to gathering basic information such as your name and college, you will also be asked to provide:
- Background, Motivation, Purpose, and Goals (500-700 words)
- Significance of the Work (200-300 words)
- Description of the Activities, Methodology, or Approach (200-300 words)

- Anticipated Results or Outcomes (200-300 words)
- Description of the Impact of the Work on the Research and/or Teaching Mission of the Department and/or College (200-300 words)

The word lengths represent <u>minimums</u>.  You are welcome to provide lengthier responses (up to 8,000 characters) and will also be given the opportunity to upload other supporting materials later in a different section such as images or figures.  **You can edit this form as many times as you like before you submit it.  Just remember to click "Save Response" each time.**



If you have any additional supporting documents to add to your proposal form, you can upload these in the "Candidate Proposal Supporting Documentation (optional)" section:



To upload supporting documents, select "Add." The default option on the window that pops-up is to select from exiting documents that you have uploaded to Interfolio ("Choose Existing"):
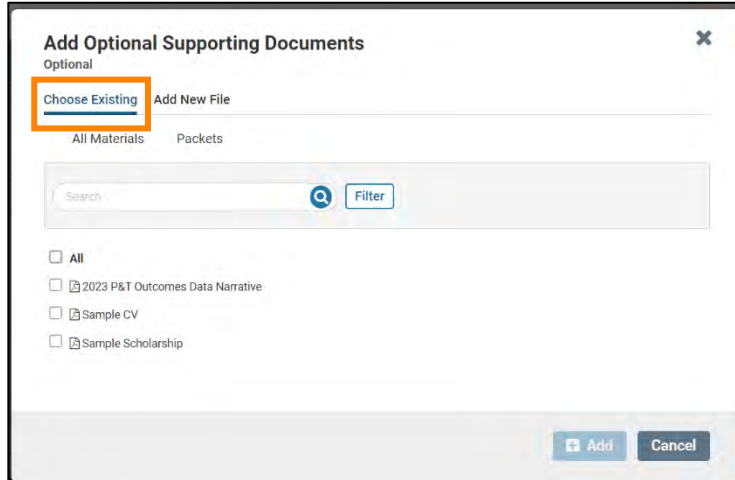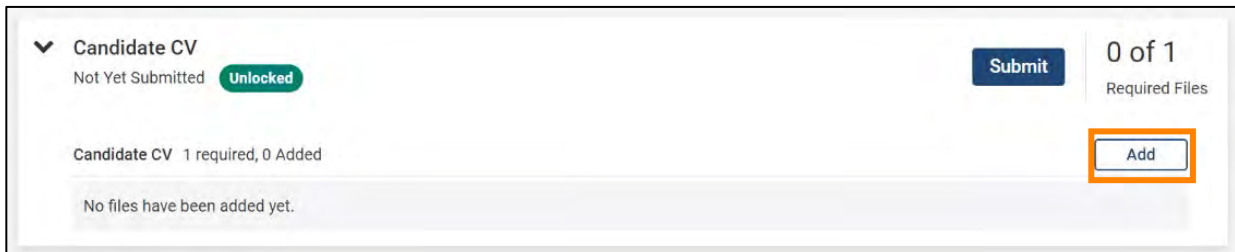
More than likely, you will be uploading new files, so select "Add New File:"
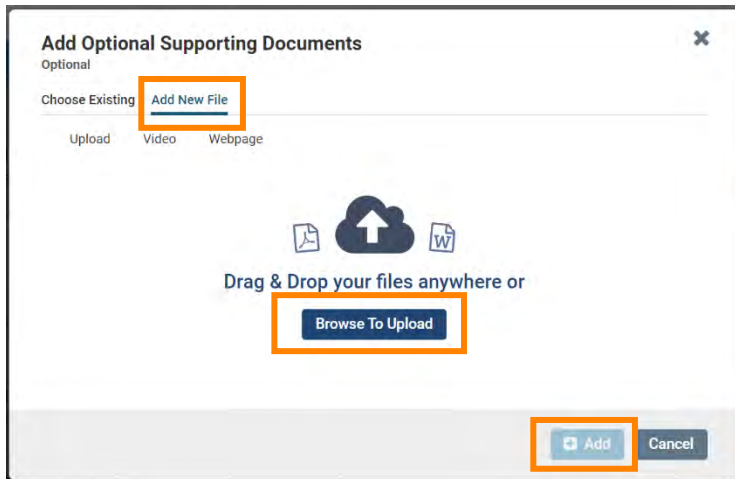


Add then drag and drop desired files from your computer into the window or click on "Browse to Upload" to navigate to files saved on your computer. Click "Add" to complete the upload.

**Step 3: Add Your CV**

Add your CV by selecting "Add" and repeating the steps described above:

**Step 4: Upload Outside Compensation and Support Letters (if applicable)**

This section is marked as optional in Interfolio, but it is **REQUIRED** if it is applicable to your leave request.



**Step 5: Tennessee Consolidated Retirement System (TCRS) Form**

You will need to follow the link provided to the TCRS form, download it, complete it, and then give it to the administrative specialist managing your case. This form will be routed outside of Interfolio for approval and your college budget director will upload it at a later step for you. Here is the link to the form: TCRS Form website.

Because this form is required before your application can be reviewed, you will be asked to complete an acknowledgement when you have completed your part.



**Step 6: Terms of Leave Agreement**

You will be asked to acknowledge that you have read, understood, and agree to the terms of the leave:



**Step 7: Submit your Application**

The last step is for you to submit your application. You will notice each section has its own "Submit" button:



You can submit your sections piecemeal as you work (they will go to the administrative specialist managing your case) or you can wait and submit all sections at once when you are finished with your application. **Please check with your administrative specialist to find out their preferences.** Once you submit a section, the administrative specialist will need to send it back to you if you need to make changes later.

**Next Steps**
- Once the administrative specialist has verified that your application is complete, your application will be routed through the review process. Office of the Provost will notify you of the final outcome.

- If your leave is granted, you will have 30 days from the date your return to submit a report describing your activities.  You will do this via Interfolio and find a separate guide to navigate you through these steps via Interfolio.
- If your plans change after your leave has been granted and you need to postpone your leave, you will find a separate guide to help you do this via Interfolio.