## Step-by-Step Guide for Faculty Candidates
Promotion and Tenure Case Preparation in Interfolio

If your name has been submitted to Faculty Affairs by your college as someone who will be considered for promotion and/or tenure in the upcoming academic year, a case will be created for you in Interfolio in the spring semester <u>before</u> the academic year in which your case will be reviewed. You will receive an email notification when your case has been created. You can access your case in three ways:
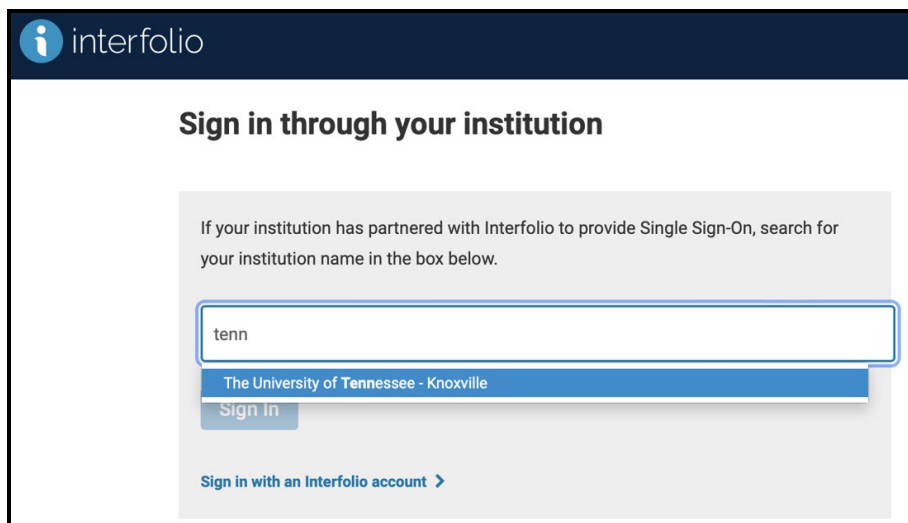
(1) Via the email you received when you case was initiated in the system (warning: the link is only active for 30 days):
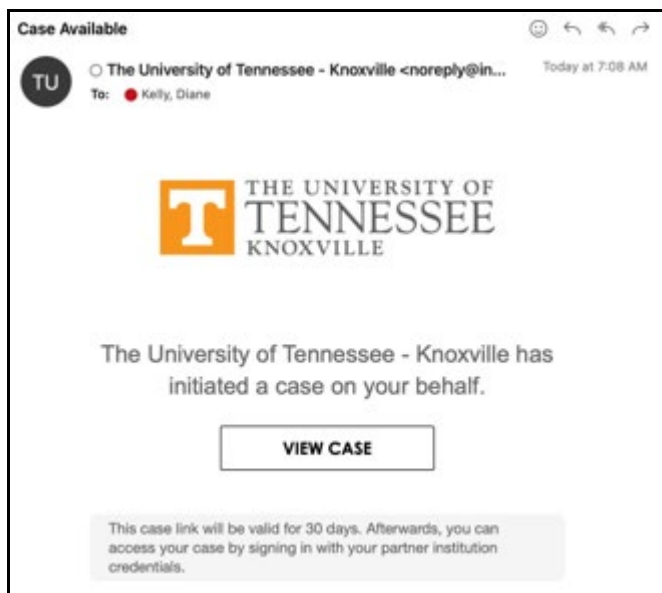
(2) By visiting http://tiny.utk.edu/interfolio which will take you to the standard UTK central authentication service.

(3) By visiting http://interfolio.com and signing into our institutional account:

Click "Sign in with Partner Institution" and then search for and select the University of Tennessee – Knoxville:

Depending on when you last authenticated, you may or may not need to complete the UTK central authentication process.

If you followed the email link, you will be taken directly to your packet. Otherwise, once you are logged in you can find and open your dossier/case packet by selecting "Your Packets" in the menu on the left of the page.
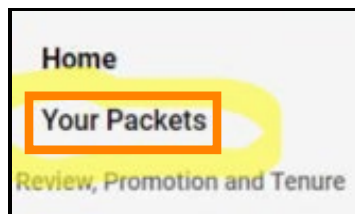

In Your Packets, select the packet that corresponds to your promotion and tenure case:

Reviewing and Building your Case

You will see the screen below when you open your case. There are three major ways to view your case:

(1)   The default screen when you first log in ("Overview") provides a dashboard of the 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.

(2)   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. 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.

(3)   The "Preview Packet" button will compile all the files you upload into a single document and launch a PDF-type viewer. From this viewer, you can download a copy of your packet (see page 6 below for an image of this view).
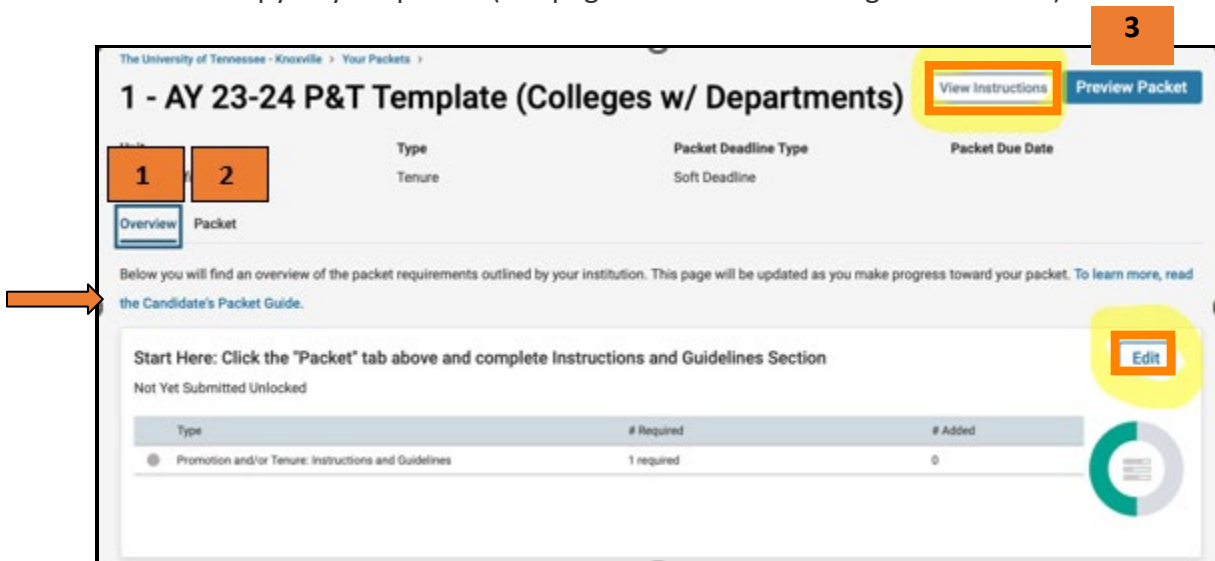
The "View Instructions" button has some brief instructions; the most extensive set of instructions are provided in the first section of your packet: "Start Here: Click the "Packet" tab above and complete the Instructions and Guidelines Section."

When you click on the "Packet" tab or the "Edit" button, you will see the following screen:

Please carefully review these instructions as they provide information about completing and submitting your dossier. They also explain the main 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:"

And then complete the acknowledgement. Be sure to click "Save Response" at the bottom of the form:

After you've done this, you should speak with your department head and administrative support staff to learn about internal workflows, expectations, and deadlines, including for materials that will be shared with external reviewers.
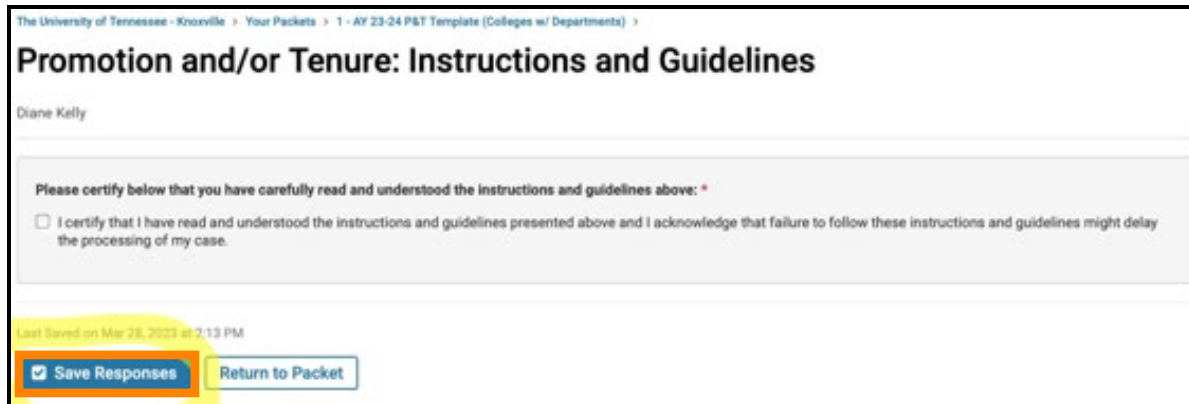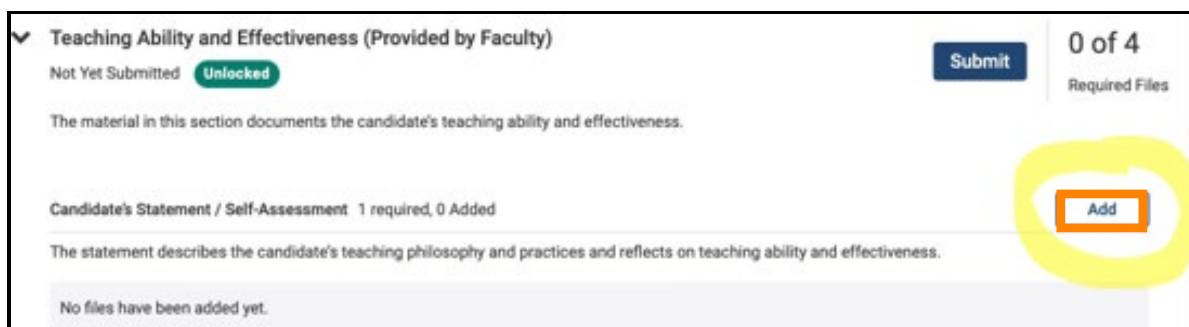
In total there are three forms you will need to complete:

(1)   The **Instructions Acknowledgement** form shown above.
(2)   The **Cover Sheet**, which provides basic information about your case.
(3)   The **Candidate Signature Statement**, which is found at the bottom of the page. This should be the very last action you take before your case moves to the next step.

For the remainder of the sections, you will upload files, by clicking the "Add" button:
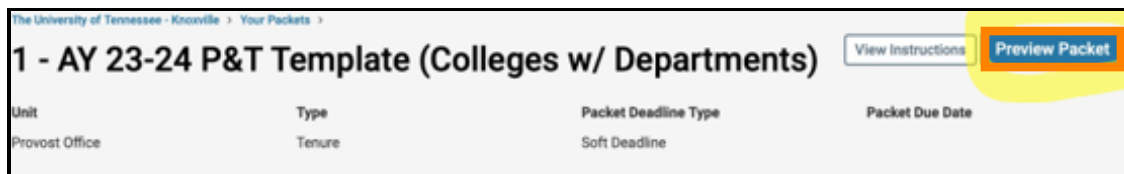
Clicking "Add" will open this window:
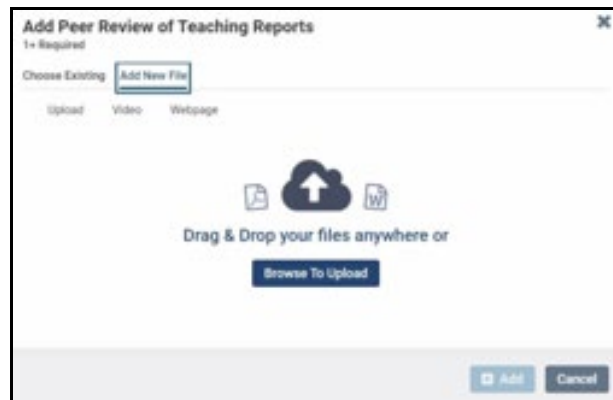
From this window you will be able to navigate to the file you want to upload.

Preview Packet
The third and final view is "Preview View." You can find this button in the top right-hand corner of the screen from both the "Overview" and "Packet" views:

Clicking this button will compile all the forms you've completed and all the documents you've uploaded into a single file and launch a PDF-type viewer (you can download this compilation for your records from the viewer):

When you upload files, please make sure the file names clearly describe the contents of the file as the file names will become additional bookmarks in the PDF and this will make it easier for those reviewing your case to understand where things are:

You are now ready to log in to Interfolio and start building your case. Again, please check with your departmental and/or college administration to learn about any internal deadlines and expectations.

Questions?

If you have questions or need help, please contact the administrative support staff in your department. You will also find resources at the [Faculty Affairs website](#) and a [list of](#) [workshops](#) that might be useful to you. You can find further guidance on the Promotion and Tenure review process in the [Faculty Handbook](#).