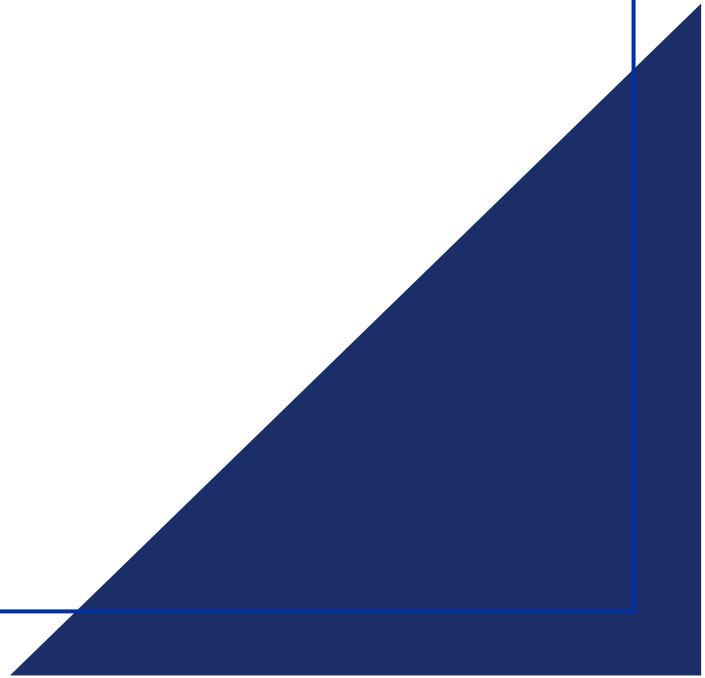# Interfolio PTR User Guide

For Department and School/College Administrative Users
(Interfolio Role: System Administrators)

Accessing Interfolio

Interfolio Job Aid: Sign in to Interfolio with SSO or a Partner Institution

1. Navigate to https://account.interfolio.com/login

2. Select "Sign in with Partner Institution"

3. Search for **University of Connecticut**. Select Sign In.

4. Login with your UConn NetID and password.

5. Select the **UConn** icon to navigate to the Promotion, Tenure, and Reappointment module. Select **Dossier** to navigate to the Dossier module.

You will be able to access either module from your profile in the upper right-hand corner of the homepage.

interfolio

Hi Jonathan,

Where do you want to go?

UCONN ← Promotion, Tenure, and Reappointment

dossier ← Dossier

Jonathan Husky ⌄

Switch Accounts

Interfolio Dossier

University of Connecticut

w. Faculty Act

Example Review Workflow for Promotion and Tenure Case

Faculty Member

Faculty Member submits "Faculty Recommendation – External Letters of Reference" section by July 1, 2022

Department Head

Department Head solicits external letters of recommendation, either via email or directly via the Interfolio module. When all external letters are received, the Department Head or Administrator moves the case forward to the next stage of access/review.

Faculty Member

Faculty Member submits "Candidate Dossier" section by August 23, 2022

Departmental PTR Committee

Departmental PTR Advisory Committee review materials. Committee Manager uploads the committee's evaluation, completes the form to indicate the committee vote, and the Committee Manager or Administrator moves the case forward to the next stage of review.

Dean

Dean reviews materials. As Committee Manager, the dean will upload an independent evaluation of the case, complete the recommendation form, and move the case forward to the next stage of review.

Dean's PTR Advisory Council

Dean's PTR Advisory Council review materials. Committee manager uploads the committee's evaluation, completes the form to indicate the committee vote, and the Committee Manager or Administrator moves the case forward to the next stage of review.

Department Head

Department Head reviews materials. As Committee Manager, the Department Head will upload a copy of the letter used to solicit external evaluations, the external evaluations summary sheet, any evaluations from secondary appointment supervisors, an independent evaluation of the case, complete the recommendation form, and move the case forward to the next stage of review.

Provost and Provost Review Committee

PRC and Provost review materials and recommend cases for further appeal or recommendation to the Board of Trustees.

Board of Trustees

The Provost will facilitate BOT review of all recommended PTR cases. Faculty will receive formal notification of the outcome of a promotion or tenure case via email following the April BOT meeting.

Committee Members -- A user must be added to a committee by an Administrator in order to view a candidate's packet on the particular cases they have access to. Committee Members will lose access when "recused" from a case at a particular workflow step by the Committee Manager or Administrator. Committee Members will lose access to a case when it has been moved forward to the next stage of review.

Committee Managers -- Possess all of the capabilities of Committee Members, plus a few more. Most noticeably, Committee Managers have the power to move a case either backward or forward after a committee has finished reviewing. In addition, Committee Managers have communication powers within the system; they can e-mail both the candidate and committee members from within the product and can complete committee submission requirements. An Administrator must designate a user as a Committee Manager in order for them to serve in this role. Committee managers will lose access to a case when it has been moved forward to the next stage of review.

Administrators -- In addition to being able to access documents, e-mail candidates, and committees, and move a case forward or backward, Administrators are the only users who can create cases for the units to which they have access. Administrators can also create standing committees. Administrators can exist at any organizational level in RPT and have the ability to perform administrative functions for all units within their administrative hierarchy. For example, an Administrator at a school/college level will have access to settings, cases, and committees only at or beneath the school/college level, such as departments. Administrators will lose such access only when "recused" from a case at a particular workflow step. Administrators at the departmental and school/college level will lose access to a case when it moves beyond a level they have access to administer.

Creating Committees

Interfolio Job Aids: Creating and Managing Committees

Creating Standing Committees

Interfolio Job Aid: Create a New Standing Committee

A standing committee is a permanent committee that an administrator creates within Interfolio. Standing committees are a way to establish committee membership once, save them to a unit, and have them available to use at any point within a workflow as a case review step.

1. Navigate to **Users & Groups** in the left-hand menu under the Promotion, Tenure, and Reappointment section of the navigation menu.
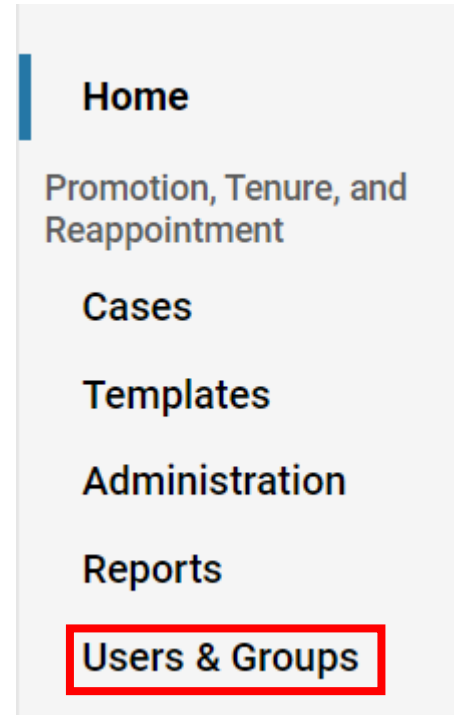
2. Open the **Committees** tab.

3. Select **Add Committee**.

Users, Committees & Units

Users   Committees   Units   Academic Levels

Search by committee name

🔍 Search Committees

Sort By Name ⌄   Browse By All Units ⌄   ➕ Add Committee

4. Enter the committee name. Select the unit that will access the committee. For example, the Animal Science departmental PTR committee should be set at the department unit as they are the only unit that will access the committee. The dean's advisory council in CAHNR should be set at the school/college unit so all departments in CAHNR can use the committee.

5. Select **Save**.

Add Committee

Name *

ANSC Dept PTR Committee

Unit

Animal Science

✔ Save

6. Add users to the committee. To search for a user, type their name in the search bar and it will populate as you type. Select **Add** next to the user's name to add that user to the committee.

7. Repeat until all members of the committee are added.

8. Assign one ore more Committee Managers by selecting the star next to their name.

9. Select **Update** when you are finished creating the standing committee.

Only existing users can be added to a standing committee. New users can be added by the Provost Office Interfolio administrators.

👥0 **Committee Members**

🔍 Search Users   Sort By Name ⌄

First Name	Last Name	Email
Test	Candidate	test_candidate@uconn.com	**+ Add**

✓ Update

Committee Added. Assign committee members below.

👥2 **Committee Members**

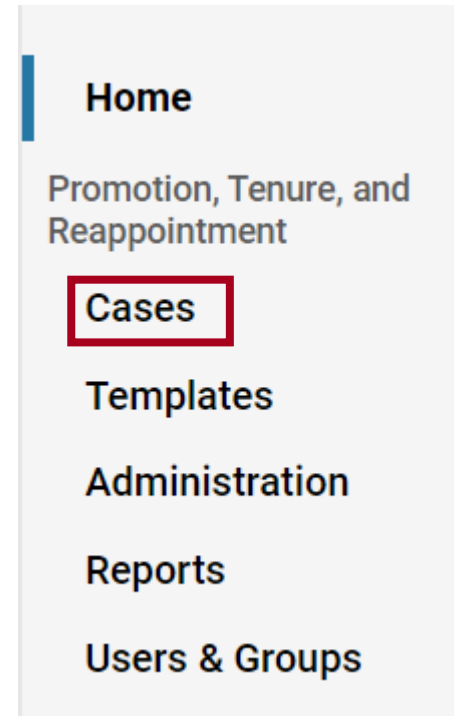| TC | Test Candidate test_candidate@uconn.com | ☆ ✖ |
| JH | Jonathan Husky provost@uconn.edu | ★ ✖ |

Creating Cases

Interfolio Job Aids: Creating and Managing Cases
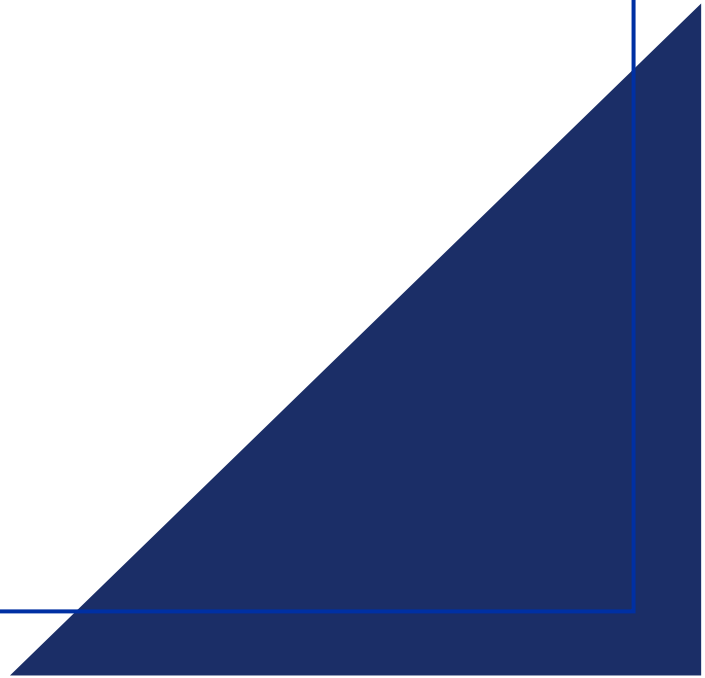
Create a Case

Interfolio Job Aid: Create a Case Based on a Template

1. Navigate to **Cases** in the left-hand menu under the Promotion, Tenure, and Reappointment section of the navigation menu.

2. Click **Create Case** in the upper right-hand corner of the case list.

University of Connecticut >

Cases

Create Case ⌄

3. Start typing the candidate's name in the box labeled **Search for a Candidate**. If the candidate exists in the system, the name will appear. Select the candidate's name, or contact the Provost's Office to create a new user.

4. Respond **Yes** to "Will the candidate be involved in the evaluation?"

5. Select a unit for the case and click **Confirm**. The unit should be the academic home department or the school/college for non-departmentalized units.

6. Select **Confirm**.

Add New Case   ✕

Selected Candidate *
JH   Jonathan Husky   ← 3. Search for a Candidate
     provost@uconn.edu

Change selected candidate

Will the candidate be involved in this evaluation? *
This setting cannot be changed after this step. Learn more about candidate involvement.

⦿ Yes, the candidate will be involved during the case.
○ No   ← 4. Always select "Yes"

Unit for Case *
Please select an organizational unit for this case.

School of Social Work   ← 5. Select Academic Home Dept

Confirm   Cancel

7. You will see a list of templates available for cases created in your unit. Select the appropriate template for the unit and PTR action. You may select **Preview** to view a summary of the template.

New Case

Blank Case

A blank case that can be customized to match your requirements

Promotion to Associate Professor and Tenure (TT Faculty) - AMC   Preview

This template is for use by tenure track faculty applying for promotion to associate professor and tenure.

Promotion to Associate Professor and Tenure (TT Faculty) - RAW   Preview

Form to be used for all Assistant Professors applying for promotion to Associate Professor AND Tenure.

Promotion to Associate Professor and Tenure (TT Faculty) - Combo   Preview

Form to be used for all tenure track faculty applying for promotion to Associate Professor or Professor AND Tenure.

8. Fill out the Case Information "Case Type"

    a.   Reappointment – Annual Reappointment

    b.   Promotion – Promotion ONLY

    c.   Tenure – Tenure ONLY

    d.   Other – Promotion AND Tenure

9. Candidate Information will carry over from the previous step. Select **Return to Case Summary** to edit selected information.

10. Case Data Forms are not in use by UConn.

11. **Save and Continue**.

Case Information

Type *

Other

← 8. Select Case Type

Candidate Information

Candidate

JH

Jonathan Husky
provost@uconn.edu

Will the candidate be involved in this evaluation?
Yes, the candidate will be involved during their case.

Case Data Forms

Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the Administration page.

Add Case Data Form ← 10. Not in use by UConn

Save & Continue   Return to Case Summary ← 9. Edit Candidate Information

12. **No not make any changes to Candidate Requirements.** Settings established by Template are university-standard and may not be edited.

13. **Continue** or use navigation options to return to Case Information or Case Summary steps.

Continue   Previous   Return to Case Summary

14. **No not make any changes to Internal Case Sections.** Settings established by Template are university-standard and may not be edited.

15. **Continue** or use navigation options to return to Case Information or Case Summary steps.

Continue   Previous   Return to Case Summary

16. **No not make any changes to Case Review Steps unless supported by the Dean's office.** Settings established by Template are university-standard and may not be edited. Only if an Ad-hoc Committee will review the case may administrators <u>edit committees</u> connected to the individual case or recuse members of a standing committee from accessing the individual case.

17. **Continue** or use navigation options to return to Case Information or Case Summary steps.

18. Review the Case Summary. Once confirmed, select **Return to Case** in the upper right-hand corner.

18. Review the Case Summary. Once confirmed, select **Return to Case** in the upper right-hand corner.

19. Review the **Case Materials** and **Case Details** tabs for accuracy. Edit as needed.

20. The case has been created and will appear in the administrator's Case List. Follow steps to Notify a Candidate of their Review.

‹ Return to Case

Jonathan Husky

Unit
School of Social Work

Template
Promotion to Associate Professor and Tenure (TT Faculty) - Combo
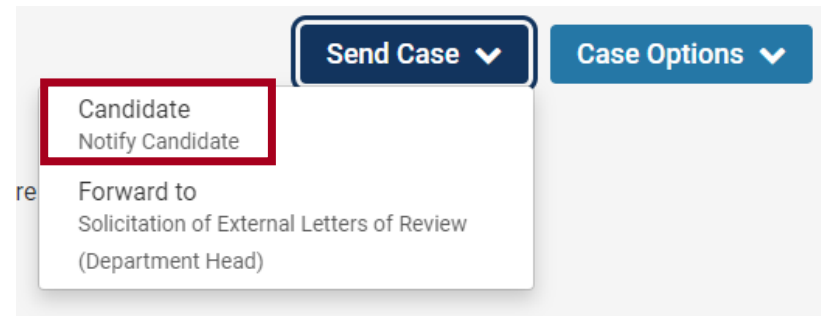
Case Materials   Case Details

Notify a candidate of their review

Interfolio Job Aid: Notify a Candidate of Their Review

From the "Create a Case" job aid:

1. Select the arrow next to **Send Case** in the upper right-hand corner of the Case Summary.
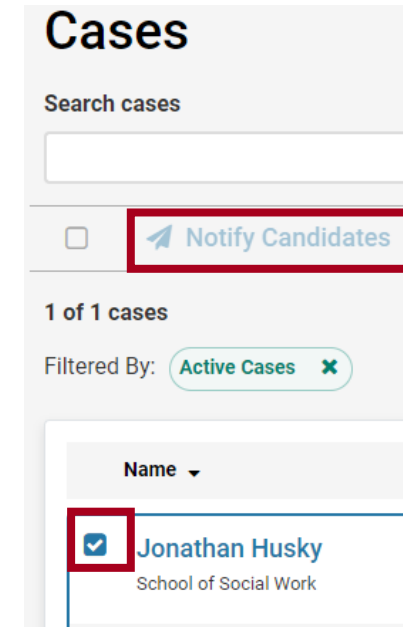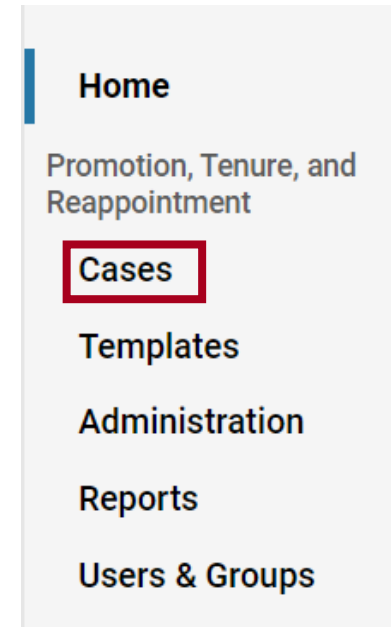
2. Select **Candidate: Notify Candidate**.

Proceed to steps 3-5

From the Interfolio home page:

1. Navigate to **Cases** in the left-hand menu under the Promotion, Tenure, and Reappointment section of the navigation menu.

2. Select the checkbox next to the candidate(s) you want to notify. Select **Notify Candidates** from the top toolbar.

Proceed to steps 3-5.

3. If desired, select the checkbox to **Include a personal message with this email**. Select **Preview.**

4. Once satisfied with the message, select **Send**.

Notify Candidate

The candidate will receive an email with instructions for uploading and submitting materials online through Interfolio.

☑ Include a personal message with this email

Subject *

Promotion and Tenure Case Ready!

Message *

Dear Jonathan Husky,

Your case for Promotion and Tenure for the FY22-23 PTR cycle is ready for your entry. Please navigate to Interfolio and complete the necessary requirements.

body   p

[Preview]   [✉ Send] [Cancel]

UCONN

University of Connecticut has initiated a review on your behalf.

[VIEW CASE]

This case link will be valid for 30 days.

Viewing your case will allow you to view requirements, read instructions, and submit your packet online.

Dear Jonathan Husky,

Your case for Promotion and Tenure for the FY22-23 PTR cycle is ready for your entry. Please navigate to Interfolio and complete the necessary requirements.

5. A popup in the lower left-hand corner will confirm that the message has been sent.

CANDIDATE NOTIFIED ✖

Candidate successfully notified.

Managing Cases

Interfolio Job Aids: Creating and Managing Cases

The Case List

All cases you currently have access to are visible in the Case List page. When a case is moved to a committee you are not on, a workflow step you have been recused from, or a stage of review you do not have access to, the case will no longer appear in your list.

The committee manager or administrator can perform bulk actions – notifying candidates, moving a case forward or backward, closing cases, deleting cases, and assigning and removing statuses.

1. Navigate to **Cases** in the left-hand menu under the Promotion, Tenure, and Reappointment section of the navigation menu.
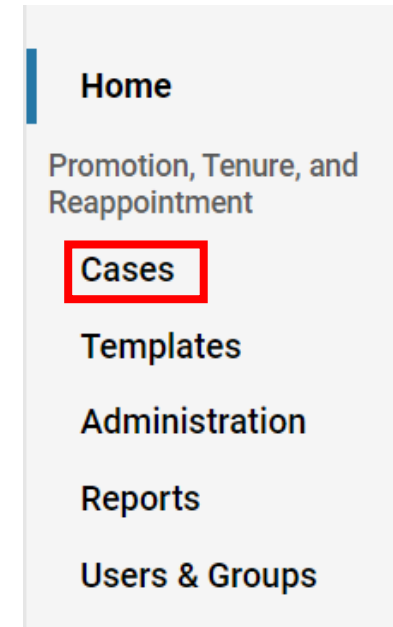
All cases at your current permission level will be visible.

Click **Filter** to filter the list by unit, case type, status, and active or closed cases or use the **Search cases** feature to search by name.
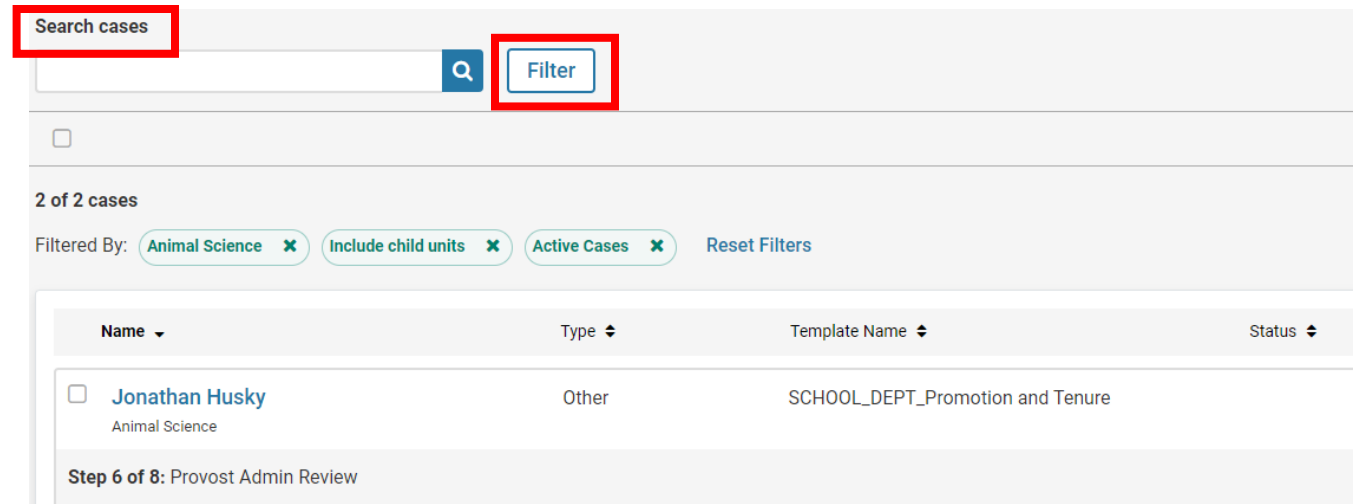
Update Candidate Materials After Submission

Interfolio Job Aid: Allow or Disallow Candidate Editing of Packet

Once the candidate submits their case, submitted sections of the packet will be "Locked" to the candidate. Administrators and Committee managers can manually unlock that section to allow a candidate to make a revision and then manually lock when the candidate updates materials.

Interfolio Job Aid: Adding Required Documents on Behalf of Candidate

Alternatively, Administrators and Committee managers can manually add required documents on behalf of a candidate or manually add external evaluations. Any materials added to the Candidate Section will be visible by the candidate.

Allow or disallow candidate editing of the packet.

1. Navigate to the Case Summary.
2. From the Case Materials tab, scroll to the Candidate Packet.
3. Select **Lock/Unlock** to reopen the section for the candidate to revise materials.
4. Once materials are updated by the candidate, select **Lock/Unlock** to re-lock the section so no further edits can be made.

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

> **External Letters of Recommendation** Locked
>   Due: Jul 1, 2022   ❓ | Unlock |

> **Candidate Dossier** Locked
>   Due: Aug 23, 2022   ❓ | Unlock |

Adding required documents on behalf of a candidate.

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

> External Letters of Recommendation Locked
> Due: Jul 1, 2022   ❓ Unlock

> Candidate Dossier Locked
> Due: Aug 23, 2022   ❓ Unlock

1. Navigate to the Case Summary.
2. From the Case Materials tab, scroll to the Candidate Packet.
3. Select **Add File** next to the requirement in the Candidate Packet and upload the file or add a URL to the video or webpage. Select **Save**.

The details will reflect the individual responsible for adding an artifact to the packet on the case page.

Section One: B. Courses Taught and C. Evaluation of Teaching 1 required   Add File

Add File ✖

Upload   Video   Webpage

Name
SET Report Cover Page_Template   ✖

✔ Save   Cancel

Section One: B. Courses Taught and C. Evaluation of Teaching 1 required   Add File

Title	Details	Actions
☐ SET Report Cover Page_Template	Added by Rachel Wice	Edit

Editing Committee Details and Membership on a Case Review Step

Interfolio Job Aid: Edit Committee Details

Interfolio Job Aid: Replace Committees or Individual Reviewers on a Case Review Step

Interfolio Job Aid: Recuse an Administrator from a Case Review Step

After a case is created, there may be a need to alter committee membership, replace a standing committee with an alternate committee for an individual case, recuse committee members from an individual case, or add ad hoc members to an individual case.

Please note that these steps will only change the committee details for the case you have selected. To alter the standing committee, navigate to the committee via the Users & Groups menu under the Promotion, Tenure, and Reappointment menu on the Interfolio homepage.

1. Navigate to the case you want to edit by clicking on the name of the candidate in your Case List.

My Tasks ①

1

Unread Tasks

Title

Jonathan Husky

Animal Science | Other | SCHOOL_DEPT_Promotion and Tenure
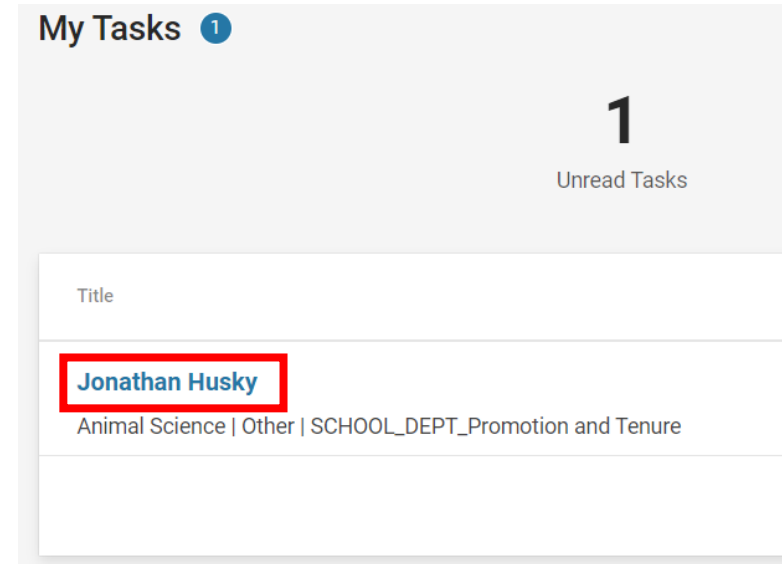
2. From the Case Summary, select the dropdown next to Case Options and select Edit Case. This will open a case summary page where you can edit the case.

Jonathan Husky

Send Case ▼   Case Options ▼

Unit
Animal Science

Template
SCHOOL_DEPT_Promotion and Tenure

Status
Select Stat

Edit Case
Email Candidate
Add Internal Section
View Activity Log
Close Case

Case Materials   Case Details

Search case materials by title
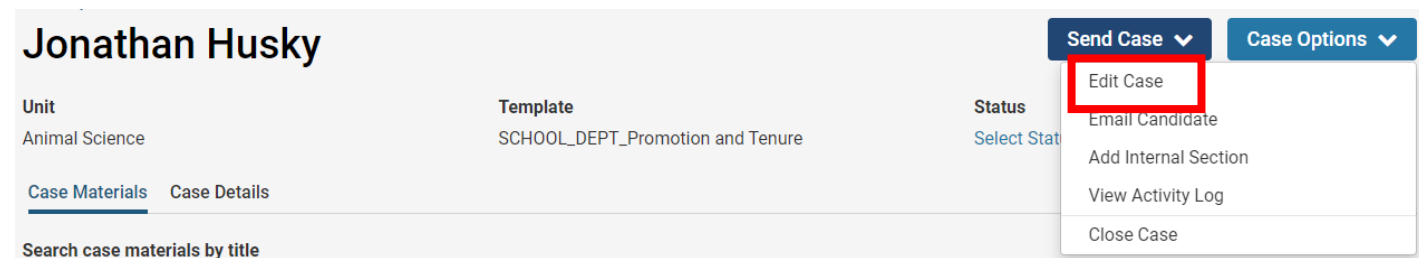
3. From the Case Summary, select **Case Review Steps** from the right-hand menu. You will see the list of current case review steps for the case.

Case Summary

Case Information		Edit
Type Other	**Name** Jonathan Husky	
Unit Animal Science	**Email** provost@uconn.edu	

Internal Case Sections	Edit
External Evaluations	Special Section

Creating a Case

1. Case Information
2. Candidate Requirements
3. Internal Case Sections
4. **Case Review Steps**
5. Case Summary

4. Find the case review step you want to edit and select **Edit**.

2	Departmental Promotion, Tenure, and Reappointment Advisory Committee Review	Edit Delete

Academic Level: UConn Provost School/College Department/Unit

Departmental Promotion, Tenure, and Reappointment Advisory Committee (1)
⊘ Includes Instructions   1 Required Document   1 Required Form

5. Navigate to the committee under **Reviewers** you want to edit.

To recuse a member from the selected case, select the **icon** next to the member's name. A pop up will ask if you wish to recuse this member.

Reviewers

Add Committee

ANSC_Dept Committee
Standing Committee (1)

Options

Manage Members   Instructions   Required Documents   Required Forms   Settings

1 Member

TH   Test Head
     test_head@uconn.edu

Add Members

Confirm

Are you sure you wish to recuse this member? They will not be able to view this case or participate in evaluation after this change.

Yes   No

6. Select **Add Members** and search by users to add one-time reviewers to the committee for the particular case.

Reminder: this will only change the committee membership for the given case. To adjust the membership of the Standing Committee, update the committee via the Users and Groups tab.

Only edit the Manage Members tab. Do not make changes to Instructions, Required Documents, Required Forms, or Settings, which are aligned with University-level PTR process.

Reviewers

+ Add Committee

∨ **ANSC_Dept Committee**
Standing Committee (1)

Options ∨

Manage Members   Instructions   Required Documents   Required Forms   Settings

👥 1 Member

| TH | Test Head | | ★ | ⊘ |
| | test_head@uconn.edu | | | |

Add Members

Add Members   ✕

🔍 Search users   Sort By Name ∨   👤 New

First Name	Last Name	Email	
UConn	APIUser	uconn_api_user@interfolio.com	+ Add

∨ **ANSC_Dept Committee**
Standing Committee (2)

Options ∨

Manage Members   Instructions   Required Documents   Required Forms   Settings

👥 2 Members

| TH | Test Head | | ★ | ⊘ |
| | test_head@uconn.edu | | | |

| UA | UConn APIUser Temporary | ✕ |
| | uconn_api_user@interfolio.com | |

For Dept Admins: Request External Evaluations on Behalf of the Department Head

Interfolio Job Aid: Request an External Evaluation through an RPT Case/Add an External Evaluation to the Case of a Candidate

Administrators and Committee managers can add or request evaluations from scholars. External evaluations can be uploaded by an Administrator or Committee manager OR evaluations can be requested from one or more external evaluators through the Interfolio PTR module and the evaluator will receive an email with instructions to upload the evaluation directly to Interfolio.

Request an External Evaluation through the External Evaluations section in Interfolio PTR module

1. Navigate to the Case Summary.
2. From the Case Materials tab, scroll to the External Evaluations section and select **Request Evaluation**

⌄ External Evaluations

| Request Evaluation | Add File |

3. Enter the name and email of the external evaluators on the Request External Evaluation page.

Note that you can click **Add Another Evaluator** to request letters from multiple evaluators at the same time.

External Evaluator Information

First Name *

First Name

Last Name *

Last Name

Email Address *

Email Address

➕ Add Another Evaluator

4. Enter an email message to the evaluator. Your request can include a personal message to the evaluator and set the From Name and Reply-to addresses, as appropriate.

Message to Evaluator

Use this message to request an evaluation of the candidate. Your request can include a personal message to the evaluator and documents to aid the evaluator in their review. Once completed, evaluators submit their reviews through Interfolio's secure delivery system.

From Name

Department Head Name

Reply-to

dept_head_email@uconn.edu

Subject

Request for External Evaluation

Message

Dear Professor [Evaluator]:

5. Attach files to the request email. Click **Add Files** in the Files section of the request form. Select files from the list of files added to the case by the candidate OR upload from your computer.

Files

Files you add here can be downloaded by the recipient when they accept the invitation to provide an evaluation.

There are no files included in this request.

+ Add Files

6. Set response settings.

a. Indicate the hard deadline after which the recipient will not be able to submit an evaluation. An Administrator or Committee Manager can still manually upload an evaluation after this date.

b. Indicate whether or not the evaluator can submit additional files.

c. Choose who can access the request and the evaluation once uploaded. The default access level is Administrators & Entire Committee. Alternative options are Administrators & Committee Managers or Administrators Only.

7. Click **Send Request**. The request, its status, and the evaluation once uploaded will appear in the External Evaluations section.

Response Settings

Deadline

The recipient will not be able to submit an evaluation after the deadline date.

Mmm d, yyyy

Can the evaluator submit additional files? *

Indicate whether or not you want to allow the evaluator to submit additional supporting materials, such as a CV, along with the requested file?

○ Yes, allow the evaluator to submit additional files.

◉ No

Access *

Choose who has access to this document.

Administrators & Entire Committee

✉ Send Request   Cancel

Manually Upload an External Evaluation to a Case

1. Navigate to the Case Summary.
2. From the Case Materials tab, scroll to the External Evaluations section and select **Add File**.
3. Upload the evaluation from your computer and **Save**.

⌄ External Evaluations

Request Evaluation   Add File

For Dept Admins: Remove and Replace Evaluation Letters on Behalf of the Evaluator

Interfolio Job Aid: Manage External Evaluations

Administrators can remove and replace a letter provided by an evaluator in the Interfolio PTR module. Please note, if a user deletes an evaluation, all files are removed.

1. Navigate to the Case Summary and scroll to the External Evaluations section.
2. Select **Edit.**
3. Select **Delete.**

Deleting an evaluation is an action that cannot be undone and the file cannot be recovered.

4. Select Add File and upload a revised evaluation from your computer.

External Evaluations

[Request Evaluation] [Add File]

Materials

Title	Details	Actions
☐ Evaluation from Test Evaluator	Requested Jul 22, 2022	Edit
☐ TEST_External Eval_Husky, Jonathan	Added by Test Head Jul 22, 2022	Edit

Edit Settings

Delete

Internal Sections

These 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 can be shared with the candidate by an administrator or committee manager.

External Evaluations

[Request Evaluation] [Add File]

Upload Documents on Behalf of a Committee

<u>Interfolio Job Aid: Upload Documents to Satisfy the Committee Document Requirements for a Case Review Step</u>

At each reviewer case step, the manager of the committee or an administrator must upload required documents before the case can be moved forward to the next step in the workflow.

Only Committee Managers can complete form requirements.

1. Navigate to the case you want to upload requirements for by clicking on the name of the candidate in your Case List.

Cases

Search cases

[🔍] [Filter]

☐

1 of 1 cases

Name ⌄	Type ⬍	Template Name ⬍	Status ⬍
☐ **Jonathan Husky**	Other	SCHOOL_DEPT_Promotion and Tenure	

Animal Science

Step 1 of 8: Solicitation of External Letters of Review (Department Head) | Sep 6, 2022

2. From the **Case Details** tab, click **Add** under Required Items.

Jonathan Husky

Unit

Animal Science

Case Materials   **Case Details** ①

> Instructions

⌄ Required Items   `1 missing`

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. 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.

Dean's Recommendation   [➕ Add]

No files have been added to this section.

Add Dean's Recommendation

Upload a new file   Select file from case

Drag & Drop your files anywhere or

Browse To Upload

3. **Browse to Upload** a new file.

Add   Cancel

4. Rename the document as needed. Ensure that the document Section is the appropriate internal case section (for example, the dean's recommendation should be uploaded in the corresponding named section).

5. Select **Add.**

Add Dean's Recommendation

Upload a new file   Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

Name *

TEST_Dean Eval_Husky, Jonathan

Section *

Dean Recommendation

Rename the document, as needed, to something easily recognizable.

Ensure the document will be added to the appropriate internal case section.

+ Add   **Cancel**

The **Required Items** section on the **Case Details** tab will reflect that the requirement is Complete.

∨ Required Items

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. 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.

Dean's Recommendation   ✓ Complete

Name

TEST_Dean Eval_Husky, Jonathan

Sharing Committee Files with Candidates and Allowing Response/Rebuttal

<u>Interfolio Job Aid: Email Candidate, Share Case Materials with a Candidate, and Allow Candidate Response/Rebuttal</u>

Administrators and Committee Managers can share packet materials such as committee documents with the candidate and allow or disallow a candidate response or rebuttal to the shared material. When sharing case materials with the candidate, the candidate will get a notification that materials has been shared with them, indicating if a response is allowed or required. They must log in to their account to view the shared files.

1. Navigate to the **Case Summary** by clicking on the name of the candidate in your **Case List**.

Cases

Search cases

[ ] [Filter]

[ ]

1 of 1 cases

	Name ▾	Type ⬍	Template Name ⬍	Status ⬍
[ ]	Jonathan Husky	Other	SCHOOL_DEPT_Promotion and Tenure	
	Animal Science			

Step 1 of 8: Solicitation of External Letters of Review (Department Head) | Sep 6, 2022

2. Navigate to the **Case Materials** tab.

Jonathan Husky

Unit

Animal Science

Case Materials   Case Details

3. Select the materials you want to share with the candidate by selecting the **checkbox** next to each document in the **Internal Sections**.

4. Select **Share** from the top toolbar. Select **With Candidate** from the dropdown.

Message to Candidate

To
Jonathan Husky (provost@uconn.edu)

Subject *

Message Subject

Message *

🗐 🗐 | **B** *I* *I*ₓ | ≔ ≔ ≔ ≔ | 🔗 🔗 | 🖼 Ω

Details

Direct email reply:

rachel.wice@uconn.edu

File Response:

☐ Enable

When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

5. Compose a message to the candidate.

6. Select **Add** to add additional files from the case to the communication or select the **X** next to a document to remove it from the communication.

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add ← Add additional files from the case to the communication.

TEST_Committee Eval_Husky, Jonathan   **✖** ← Remove a file from the communication.

7. To allow the candidate to respond to the file, check **Enable** under **Details** at the right of the screen.

8. Enter a reason for the message (i.e. "Rebuttal") and set a deadline for a response. *This is a hard deadline. Candidates will not be able to submit a response after this deadline.*

9. Select the internal case section in which the candidate response will appear once it is received (for example, if the faculty member is submitting a written rebuttal to the dean's advisory council's recommendation, select the Dean's Advisory Council Recommendation section.)

Details

Direct email reply:

rachel.wice@uconn.edu

File Response:

☑ Enable

When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

Message Reason

e.g. rebuttal, reminder

Deadline ❓

Mmm d, yyyy 📅 ❓

Section for Response *

-- Select Section --

10. **Preview** the message and **Send** when ready.

No files will be directly attached to the email. The candidate will receive an email notification to login to their Interfolio account to view shared files.

Message to Candidate

To
Jonathan Husky (provost@uconn.edu)

Subject *
Invitation to Provide Written Rebuttal

Message *

Dear Jonathan Husky,

The Dean's Advisory Council invites you to submit a written rebuttal to their evaluation of your case for promotion and tenure. You may review the evaluation in Interfolio and upload a written response by the indicated deadline.

body   p

Share Files
Files shared with this message can be viewed by the candidate after logging into Interfolio.

+ Add

TEST_Committee Eval_Husky, Jonathan   **✕**

Details

Direct email reply:
rachel.wice@uconn.edu

File Response:
☑ Enable
When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

Message Reason
e.g. rebuttal, reminder

Deadline ❓
Mmm d, yyyy   📅   ❓
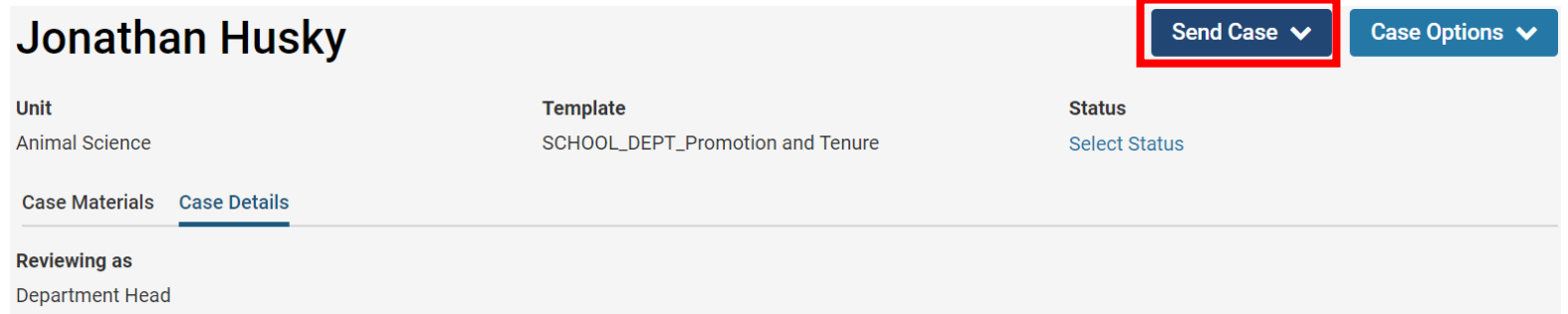
Section for Response *
Dean's Advisory Council Recomi ▼

👁 Preview   **✉ Send**   **Cancel**

Sending a Case Forward on Behalf of a Committee

<u>Interfolio Job Aid: Move a Case Forward</u>

When all Committee Required Items have been satisfied, the Committee Manager or Administrator can move the case forward to the next stage of review.

15. From the Case Summary Page, select Send Case from the top righthand options.

Jonathan Husky

Send Case ∨   Case Options ∨

Unit
Animal Science

Template
SCHOOL_DEPT_Promotion and Tenure
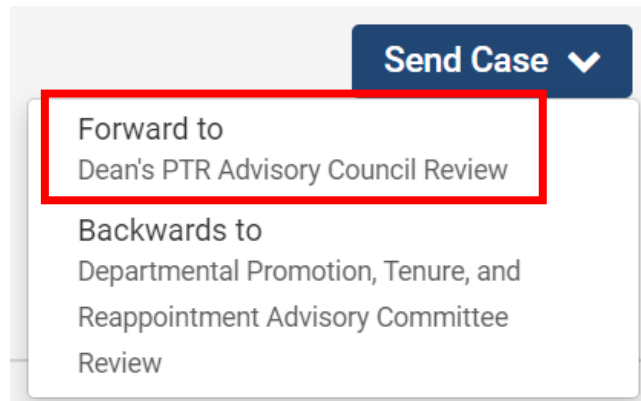
Status
Select Status

Case Materials   Case Details

Reviewing as
Department Head

16. Select **Forward to**.

Send Case ∨

Forward to
Dean's PTR Advisory Council Review

Backwards to
Departmental Promotion, Tenure, and
Reappointment Advisory Committee
Review

16. A list of all committees and reviewers gaining access to the next step will display, along with the option to enter a message to the reviewers gaining access to the case.

Deselect the checkbox next to "Send a message to the reviewers gaining access" if you do not wish to send a message. Regardless of whether a message is sent or not, when a committee member gains access to a case, a tsk for that case will display on their homepage.

17. Select **Continue**.

Send Case Forward

Great job! You're sending the case forward to the next step, Dean's PTR Advisory Council Review. The following reviewers will lose access to the case:

Department Head | 1 members

The following reviewers will gain access to the case:

Dean's PTR Advisory Council | 0 members

☑ Send a message to the reviewers gaining access.

If recipients respond to this message, their response will come directly to your email inbox.

Subject *

Husky, Jonathan - PTR Case

Message *

Dear committee members,

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,
Test Head

Preview   Continue   Cancel

18. You'll see a green popup box in the lefthand corner of your screen confirming that the case as been sent forward.

All reviewers who do not have access to the next level of review will lose access to the case.

CASE SENT FORWARD ✕

Case successfully sent forward.

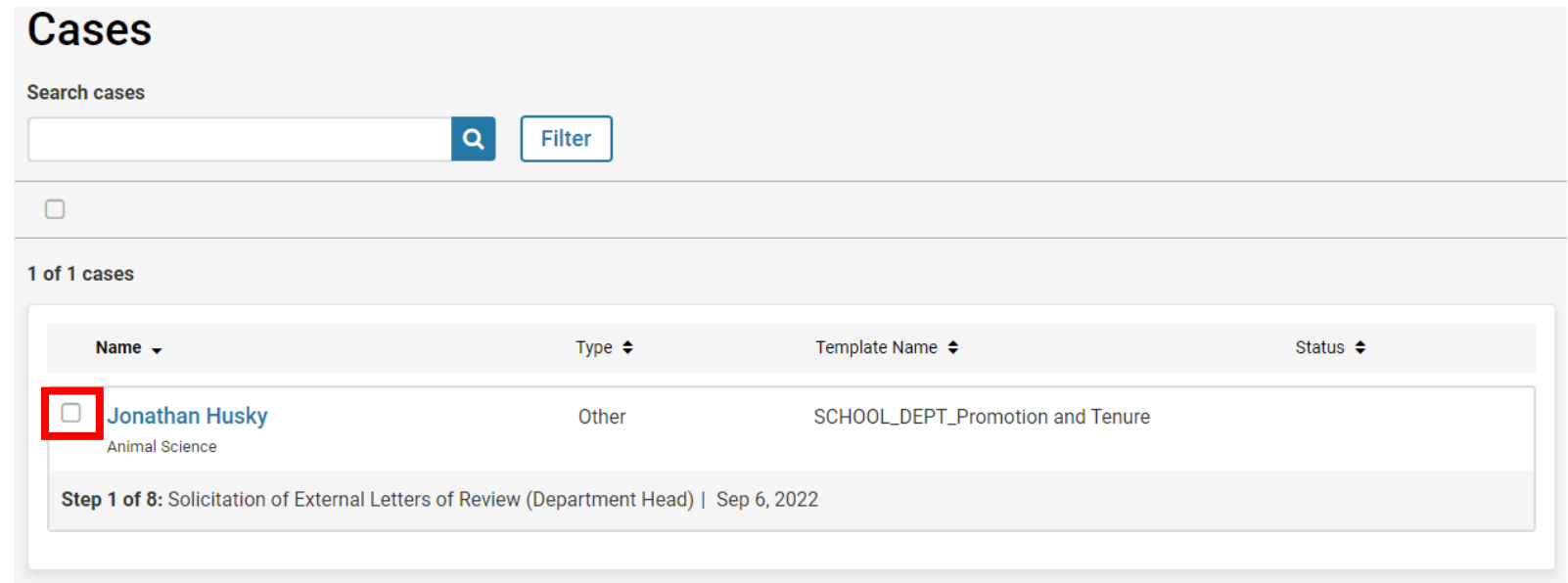# Sending Multiple Cases Forward in Bulk on Behalf of a Committee

Interfolio Job Aid: Move a Case Forward

Committee Managers or Administrators can move multiple cases forward in bulk from the Case List.

1. From the Interfolio homepage select **Cases** under the Promotion, Tenure, and Reappointment lefthand navigation bar.

Home

Promotion, Tenure, and Reappointment
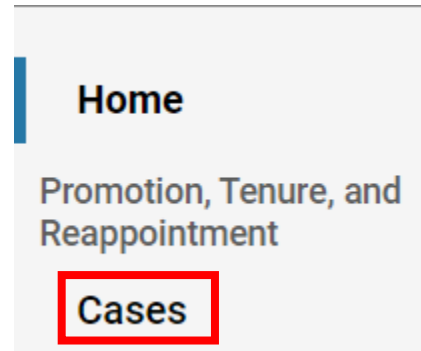
Cases

2. Select the cases from the Case List by clicking the checkbox next to each.

Cases

Search cases

[   ] 🔍 | Filter |

☐

1 of 1 cases

Name ⌄	Type ⬍	Template Name ⬍	Status ⬍
☐ Jonathan Husky Animal Science	Other	SCHOOL_DEPT_Promotion and Tenure	

Step 1 of 8: Solicitation of External Letters of Review (Department Head) | Sep 6, 2022

3. Click **Send Forward** at the top of the case list to move selected cases forward.

Cases

Search cases

[   ] [🔍] [Filter]

☐   ◀◀ Send Backward   ▶▶ Send Forward   ••• More Options

1 of 1 cases

Name ▾	Type ⬍
☑ **Jonathan Husky** Animal Science	Other

Step 2 of 8: Departmental Promotion, Tenure, and Reappointment Advisory Committee

4. A list of all committees and reviewers gaining access to the next step will display, along with the option to enter a message to the reviewers gaining access to the case.

Deselect the checkbox next to "Send a message to the reviewers gaining access" if you do not wish to send a message. Regardless of whether a message is sent or not, when a committee member gains access to a case, a task for that case will display on their homepage.

5. Select **Continue**.

Send Case Forward

Great job! You're sending the case forward to the next step, Department Head Review. The following reviewers will lose access to the case:

Departmental Promotion, Tenure, and Reappointment Advisory Committee | 1 members

The following reviewers will gain access to the case:

Department Head | 0 members

☑ Send a message to the reviewers gaining access.

If recipients respond to this message, their response will come directly to your email inbox.

Subject *

Husky, Jonathan PTR Case

Message *

Dear committee members,

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,
Test HeadComm

👁 Preview   Continue   Cancel

6. You'll see a green popup box in the lefthand corner of your screen confirming that the case as been sent forward.

All reviewers who do not have access to the next level of review will lose access to the case.

CASE SENT FORWARD ✖

Case successfully sent forward.

View the Activity Log of a Case

<u>Interfolio Job Aid: View the Activity Log of a Case</u>

The Activity Log is a record of all actions taken on a case, including when a case is moved to a different review step, when documents are shared, when messages are sent, changes in the status of the case, when the membership of a committee is changed, when external evaluations are requested, and more.

1. Navigate to the Case Summary.
2. Select the dropdown for **Case Options** in the upper left-hand screen and select **View Activity Log**.

You will see a chronological display of all activity on the case. You can also click to view the content of communications sent for some activities.

| Send Case ∨ | Case Options ∨ |

Edit Case

Email Candidate

Add Internal Section

View Activity Log

Close Case
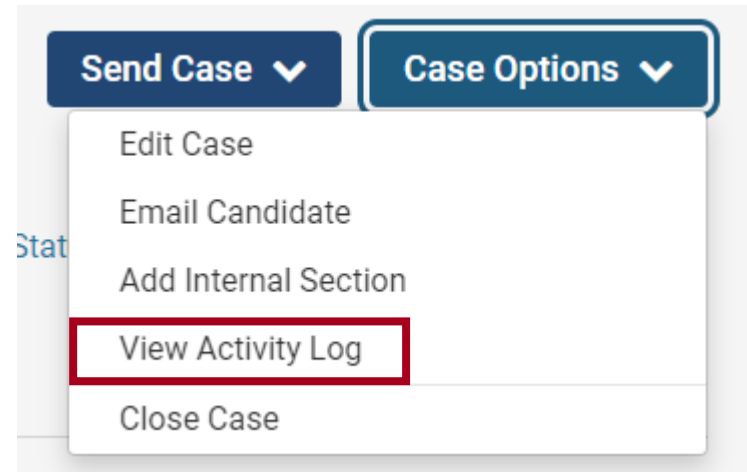
Case Activity for Jonathan Husky

Search by event

Date ▾	Event ⬍
Jun 24, 2022 at 12:07 PM	Rachel Wice (rachel.wice@uconn.edu) locked section Candidate Dossier.
Jun 24, 2022 at 12:07 PM	Rachel Wice (rachel.wice@uconn.edu) locked section External Letters of Recommendation.
Jun 24, 2022 at 11:48 AM	Rachel Wice (rachel.wice@uconn.edu) notified Jonathan Husky of the review.

Generate and Download Reports

Interfolio Job Aid: Generate and Download Reports

Administrators can run and save customized case information reports and reports on voting results.

There are two types of reports in use by UConn – Case Information Reports and Case Forms Reports.

- Case Information reports allow you to create customized reports on cases in your unit.

- Case Form Reports pull data from form responses included in cases for one or more packets in one or more units.

1. Navigate to **Reports** in the left-hand menu under the Promotion, Tenure, and Reappointment section of the navigation menu.

2. Select the type of report you want to run – "Case Information" or "Forms" are in use by UConn.