

Autumn Quarter Reappointments

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Creating cases

1. Before beginning in Interfolio, you will need to gather the names of your faculty who are interested in applying for sabbatical in the upcoming year. A separate case will need to be created for each of those individuals.
2. Log in to [Interfolio](#) with your NetID and password.
3. On the far left, choose “Cases”
4. Choose “Create Case” in the upper right corner



5. Search for your candidate by name or email address and choose them from the drop down, mark that they will be involved in the case, select your unit, and click “confirm”:

Add New Case

Search for a Candidate *

husky

Harry Husky
harry.husky@uw.edu

Selected Candidate *

The candidate information will display here once they are selected.

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

Unit for Case *

Please select an organizational unit for this case.

College of Arts and Sciences

Confirm Cancel

6. Choose the Autumn quarter reappointment template (or, if the recommendation is to not reappointment, then choose ‘Autumn quarter NON-REAPPOINTMENTS’).



Create Your Case – Part 1: Case Information

7. Verify the information entered is correct and click “Save & Continue:

University of Washington > Cases > Harry Husky >

Case Information

Type *
Reappointment

Candidate Information

Candidate

 Harry Husky
harry.husky@uw.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](#)

[Save & Continue](#)

[Return to Case Summary](#)

Create Your Case – Part 2: Candidate Requirements

8. At this point, you can set a due date for the candidate or amend the candidate instruction (neither are required). Please do not change the packet requirements.

University of Washington > Cases > Harry Husky >

Candidate Requirements

Candidate's Packet Due

MM/DD/YYYY

Instructions To Candidate

Customize instructions to the candidate about assembling their packet and any other procedures, policies, or deadlines at your institution. You can also include links to required forms and online resources such as instructions or handbooks outlining your policies.

Please upload the following documents as individual PDF files:

1. Current curriculum vitae, including biography
2. Yearly activity reports (dating back to last reappointment or hire date, whichever is more recent)
3. *Student evaluations (at least one per year dating back to last reappointment or hire date, whichever is more recent)

*Student evaluations are not required for Research faculty.

For more information on the reappointment process, see <https://admin.artsci.washington.edu/reappointment-procedure#autumn>.

body

Creating a Case

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

9. Click ‘continue’ at the very bottom of the page to move forward.

Create Your Case – Part 3: Internal Case Sections

10. Please do not change the internal case sections. Simply click ‘continue’ at the bottom of the page to progress forward.

Create Your Case – Part 4: Case Review Steps

11. Click ‘edit’ next to step 1: Department Case Completion

University of Washington > Cases > Harry Husky >

Case Review Steps

[+ Add Step](#)

[Additional Options](#)

1 Department Case Completion

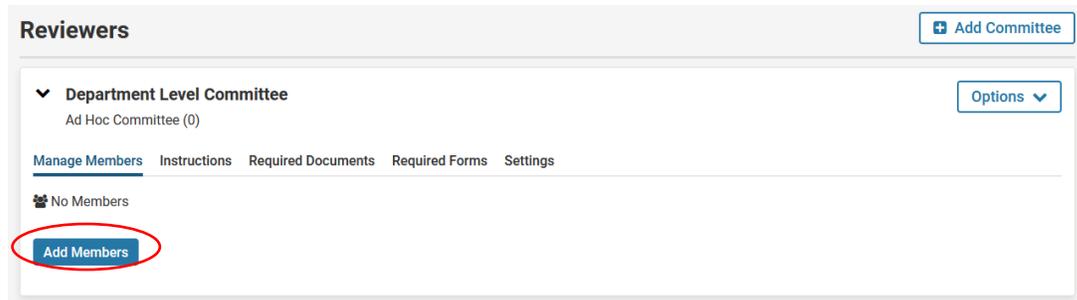
[Edit](#) | [Delete](#)



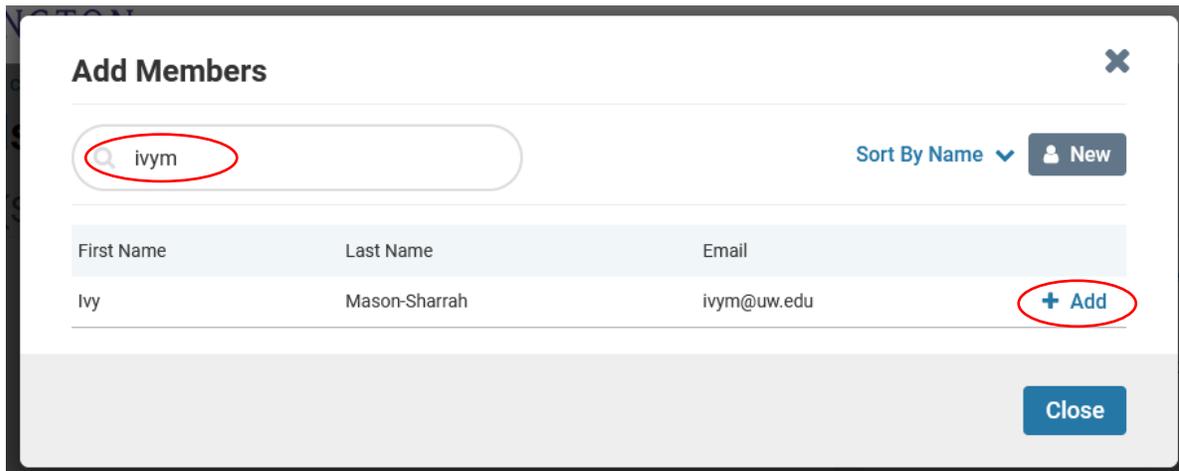
Department Level Committee (0)

Includes Instructions 2 Required Documents No Required Forms

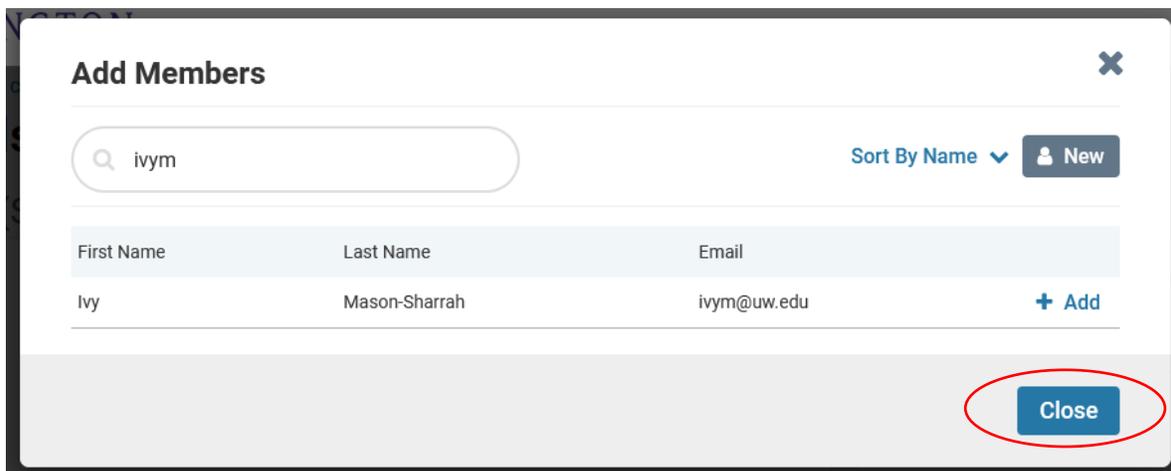
12. Choose "Add Members"



13. Search for the name of the individual who will upload the department documents and then click add – this may be the Chair or the administrator. Also note that, again, you should search by first name, last name, or email and not full names



14. Close out the committee editing window



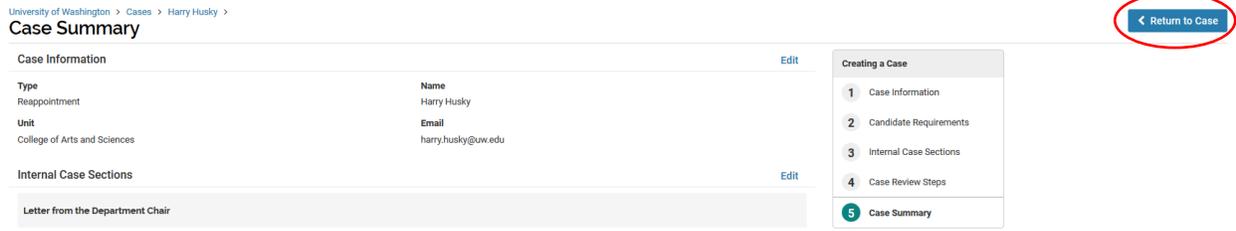
15. Click 'Return to Case Review Steps' at the bottom of the page

16. Repeat steps 11-15 for Step 3: Divisional Dean Review

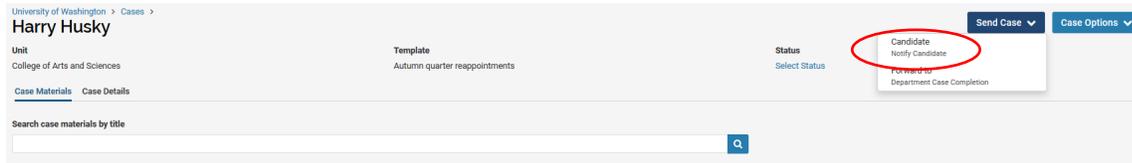
17. Choose 'Continue' at the bottom of the case review steps

Create Your Case – Part 5: Case Summary

18. Review the case to ensure accuracy. Once done, click 'Return to Case' in the upper right corner



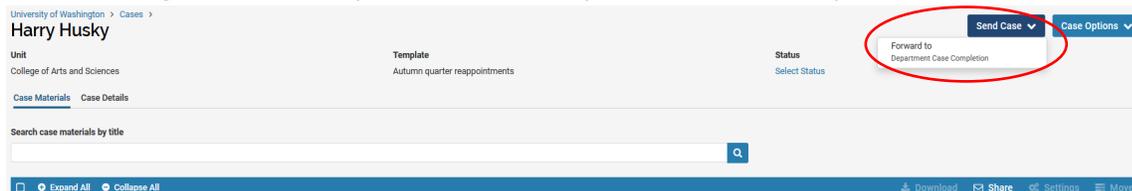
19. Notify your candidate by clicking 'Send Case' in the upper right corner and then choose 'Candidate' from the drop down



a. Select the option to 'include a personal message with this email' and fill in the message you would like to send to your candidate. Then click 'send.'

The screenshot shows the 'Notify Candidate' dialog box. The title is 'Notify Candidate' with a close button (X) in the top right corner. Below the title, there is a message: 'The candidate will receive an email with instructions for uploading and submitting materials online through Interfolio.' There is a checkbox labeled 'Include a personal message with this email' which is checked and circled in red. Below the checkbox, there is a 'Subject' field with the text 'Reappointment documents needed'. Below the subject field, there is a 'Message' field with a rich text editor toolbar and the text: 'Dear Harry, Please log in and submit all required documents for your reappointment. Thank you|'. At the bottom of the dialog, there are three buttons: 'Preview', 'Send' (circled in red), and 'Cancel'.

20. Send the case forward to enter departmental documents by clicking 'Send Case' in the upper right corner and then choosing 'Forward to department case completion' from the drop down



a. If you are the individual entering the department's documents, then you can choose to not send a message. However, if someone else is uploading the documents, please be sure to send a message –

you can edit the content as desired. Once done, click 'continue' at the bottom

Send Case Forward

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

Case is With Candidate | 0 members

The following reviewers will gain access to the case:

Department Level Committee | 1 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 *

Message Subject

Message *

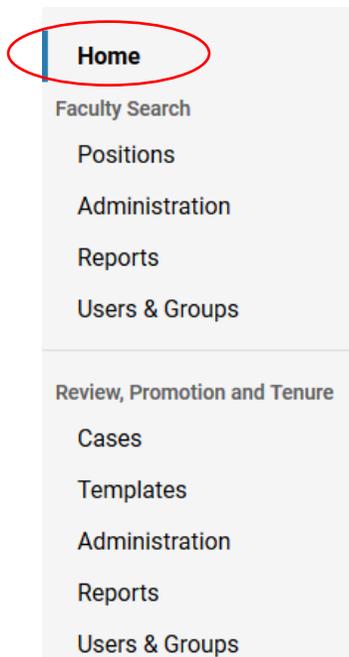
Dear committee members,
This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.
Best,
Ivy Mason-Sharrah

body

Preview Continue Cancel

Uploading the departmental documents

21. Choose 'Home' from the far left menu



22. Choose your case from the list

Welcome back, Ivy Mason-Sharrah

Your Action Items

Files have been shared with you

RPT | # requested responses: 0 | Last updated: September 30, 2019 | Review, Promotion and Tenure

Harry Husky

College of Arts and Sciences | Sabbatical | Sabbatical request | Review, Promotion and Tenure

23. To upload the documents
a. Click 'Case Details'

University of Washington > Cases >
Harry Husky Send Case Case Options

Unit: College of Arts and Sciences Template: Autumn quarter reappointments Status: [Select Status](#)

Case Material **Case Details** 2

- b. Click 'Add File' next to the requirement

Required Items 2 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.

Letter from the Chair Add

Reporting: departmental recommendation and term of reappointment complete faculty vote reasons for faculty decision chair's independent recommendation assessment of research, teaching, and service

No files have been added to this section.

Collegial Evaluations Add

(dating back to the last reappointment/hire date - whichever is more recent) Multiple evaluations need to be combined into a single PDF.

No files have been added to this section.

- c. Upload the file and click 'Add'

Add Chair approval ×

[Upload a new file](#) [Select file from case](#)

Drag & Drop your files anywhere or

Browse To Upload

Add Cancel

- d. Specify the name of the document (if changing from the file name) and assign to a section. Click "Add."
Once the document(s) have been uploaded and designated, close out of the window

Add Letter from the Chair ×

[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.

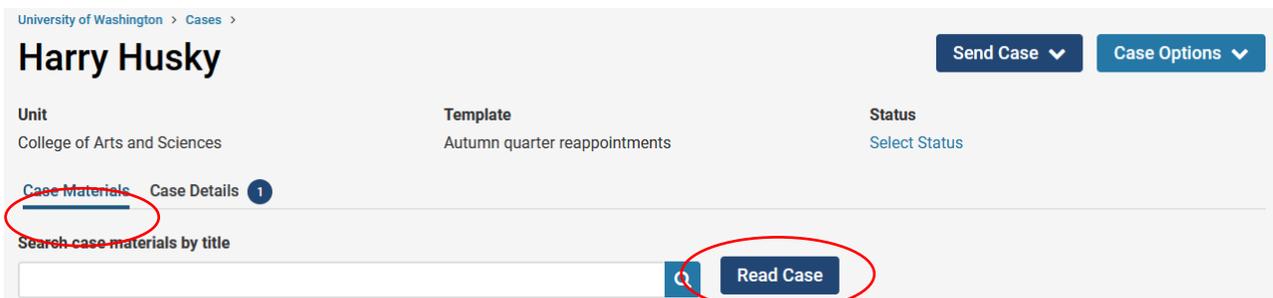
Name * Section * Letter from the Department Chair

Add Cancel

- e. Once the file(s) are uploaded, you will see  **Complete** next to the requirement.

Downloading the case

24. Once all documents (including the candidate documents) are uploaded, you can access all documents as a single file by clicking to 'Case Materials' and then choosing 'Read Case'



- a. Once the case is open in the reading view, click 'Download' and then 'Download Packet' from the drop down

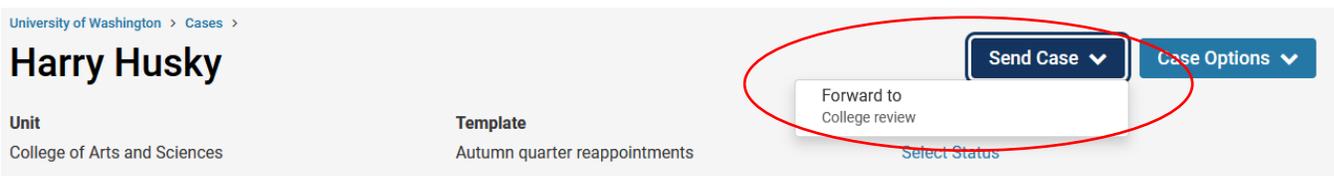


- b. Close out of the reading view by clicking 'Return to Case' in the upper right corner

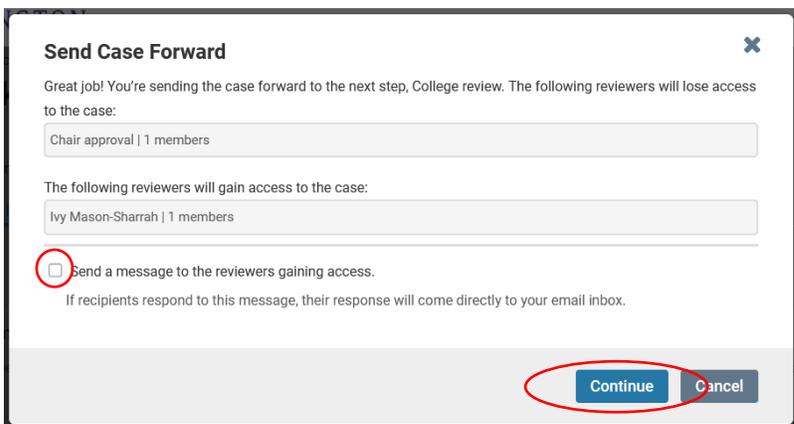


Submitting the case for Dean's office review

25. Click 'Send Case' in the upper right corner and then choose 'Forward to College Review' from the drop down



- a. Opt to NOT send the message to the reviewers with a message and click "Continue."



Congratulations! You're done!