

Autumn Reappointment Cases In Interfolio

How to create and manage the Autumn reappointment cases in Interfolio.

1

Go to Interfolio : <https://account.interfolio.com/login> Click "Sign in with Partner Institution"



Sign In

Sign in with email

Email *

Password *

Sign In

[Forgot your password?](#)

Other Sign In Options

Sign in with Partner Institution



Sign in with Google

2

Search for University of Washington and click to sign in. This will redirect to your UW NetID log in.

Sign in through your institution

If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.



Sign In

[Sign in with an Interfolio account >](#)

Don't have an account?

Sign up now.

Use Interfolio's suite of services to simplify your academic life.

Sign Up



3

Go to the menu on the left side and click on "cases" in the RPT menu.

Home

Your Packets

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

Search

2

Read Tasks

Due Date

Tasks

Position Details

Position Details

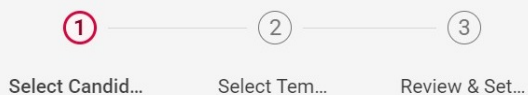
EP Promotion Template

4 Click "CREATE CASE"

The screenshot shows the University of Washington HR system interface. The header includes the University of Washington logo and the name 'Susan Miller' with a dropdown arrow. The left sidebar contains a navigation menu with the following items: Home, Your Packets, Faculty Search, Positions, Administration, Reports, Users & Groups, Review, Promotion and Tenure, Cases (highlighted with a blue bar), Templates, Administration, Reports, and Users & Groups. The main content area features a search bar with a magnifying glass icon, a 'FILTER' button, and a 'COLUMNS' dropdown. Below these are buttons for 'LOSE CASES', 'NOTIFY CANDIDATE' (with an envelope icon), 'SEND BACK' (with a left arrow icon), and 'SEND FORWARD' (with a right arrow icon). A table with the following headers is visible: Case type, Case step, Template name, Case status, and Step deadline. The 'CREATE CASE' button in the top right corner is highlighted with an orange circle.

5 Click "SELECT CANDIDATES" and enter the faculty member's name.

Create Cases



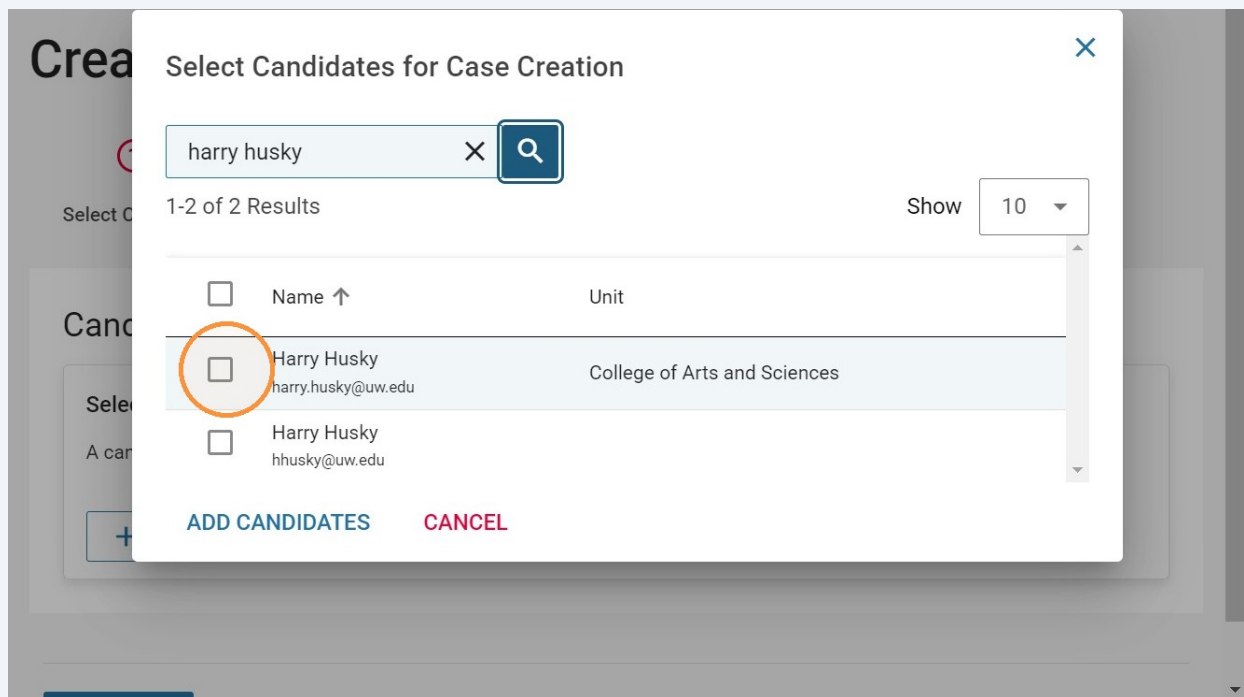
Candidate Information

Selected Candidates

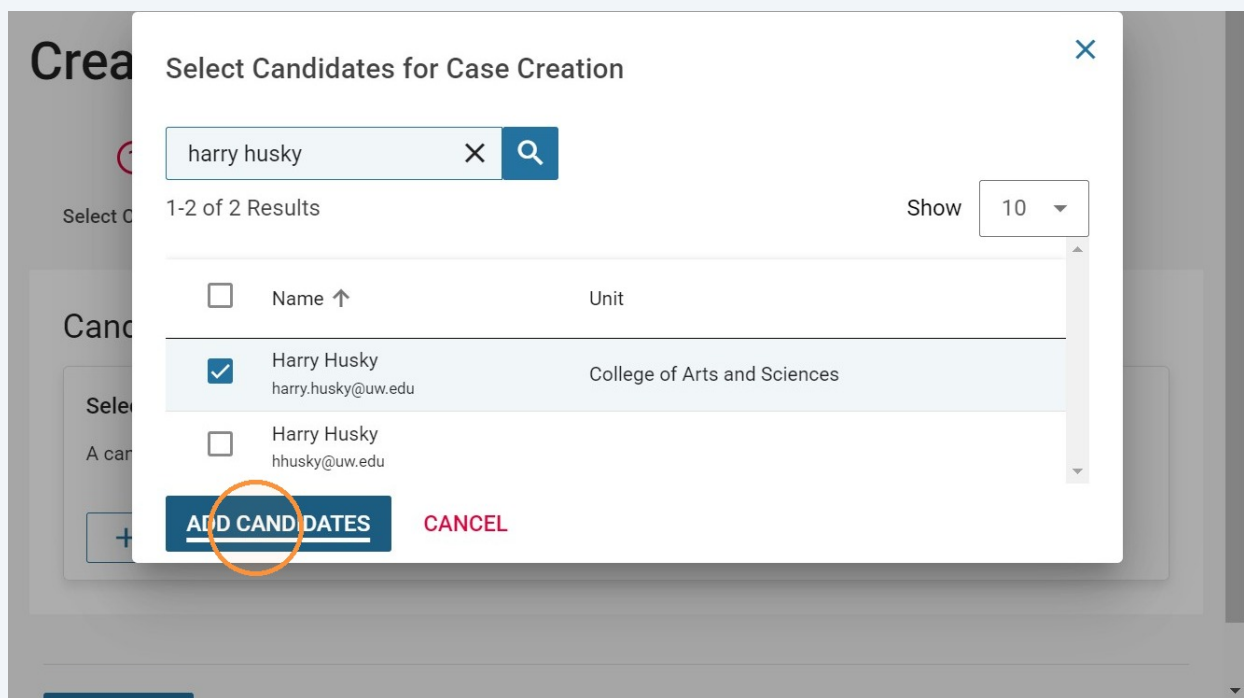
A candidate has not been selected. Once you select one or more candidates, the candidate information will display.

+ SELECT CANDIDATES

- 6 Search for your faculty member's name and click to add them to the case.



- 7 Click "ADD CANDIDATES"



8 Click "CONTINUE"

Candidate Information

Selected Candidates

1-1 of 1 Results

Show

10

Candidate	Unit ↑
 Harry Husky harry.husky@uw.edu	College of Arts and Sciences

+ SELECT CANDIDATES

1 candidates selected for case creation.

CONTINUE

CANCEL

9 Use the drop down menus to choose your unit and 'reappointment' case type.

UNIVERSITY of WASHINGTON

Susan Miller

Unit for Case(s) *

Cases can only be created in one unit.

Geography

Type

--

Appointment

Promotion

Reappointment

Review

Sabbatical

and case type chosen in the case settings.



10

Choose the Autumn quarter reappointments case for the current year and continue.

	Template Information	Unit ↑	Type
☐	Custom Case Create a unique case by customizing forms and workflow steps rather than using a template.		
☐	Autumn quarter reappointments 2026-2027 For a list of titles and instructions, see https://admin.artsci.washington.edu/reappointment-procedures#autumn .	College of Arts and Sciences	Reappointment
☐	Autumn quarter NON-REAPPOINTMENTS For a list of titles and instructions, see https://admin.artsci.washington.edu/reappointment-procedures#autumn .	College of Arts and Sciences	Reappointment
☐	Assistant Professor and Tenure-Track renewals For more specifics on this process, see https://admin.artsci.washington.edu/reappointment-procedures#assistant .	College of Arts and Sciences	Reappointment
☒	Autumn quarter reappointments 2027-2028 For a list of titles and instructions, see https://admin.artsci.washington.edu/reappointment-procedures#autumn .	College of Arts and Sciences	Reappointment

11

Click "Yes, the candidate will be involved during the case." You do not need to notify the candidate yet.


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Susan Miller ▾

Settings

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

Would you like to notify the candidates now? *

An automatic notification will be sent to the candidate after the case is created with instructions for uploading and submitting materials online.

☐ Yes

☒ No

12 Click "CREATE 1 CASE"

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

Would you like to notify the candidates now? *

An automatic notification will be sent to the candidate after the case is created with instructions for uploading and submitting materials online.

- ☐ Yes
☒ No

CREATE 1 CASE

PREVIOUS

CANCEL

13 You'll need to edit the case review steps to add department member(s) and divisional dean. Click "Case Options" then click "Edit Case"



UNIVERSITY of WASHINGTON

Susan Miller ▼

University of Washington > Cases >

Harry Husky

Unit

Geography

Template

Autumn quarter reappointments 2027-2028

Status

[Select Status](#)

[Case Materials](#)

[Case Details](#)

Search case materials by title

Send Case ▼

Case Options ▼

Edit Case

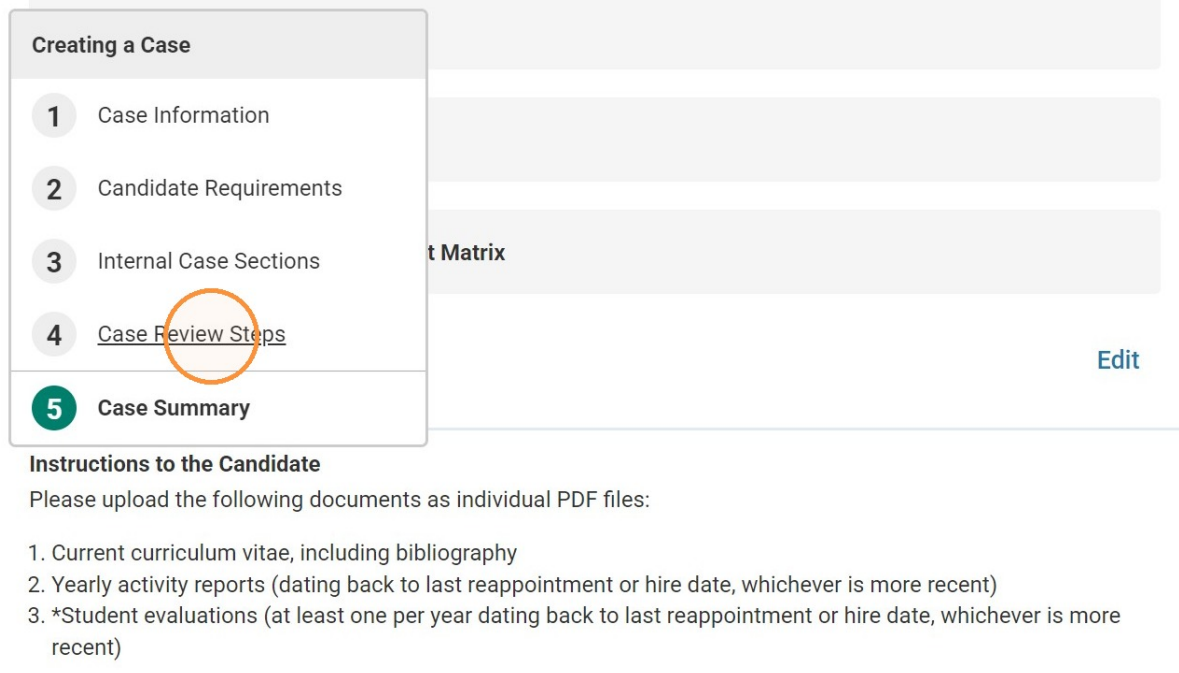
Email Candidate

Add Internal Section

View Activity Log

Close Case

14 In the menu, click "Case Review Steps"



The screenshot shows a sidebar menu titled "Creating a Case" with five numbered items. The fourth item, "Case Review Steps", is highlighted with an orange circle. The background shows a blurred view of the main interface with a table and an "Edit" button.

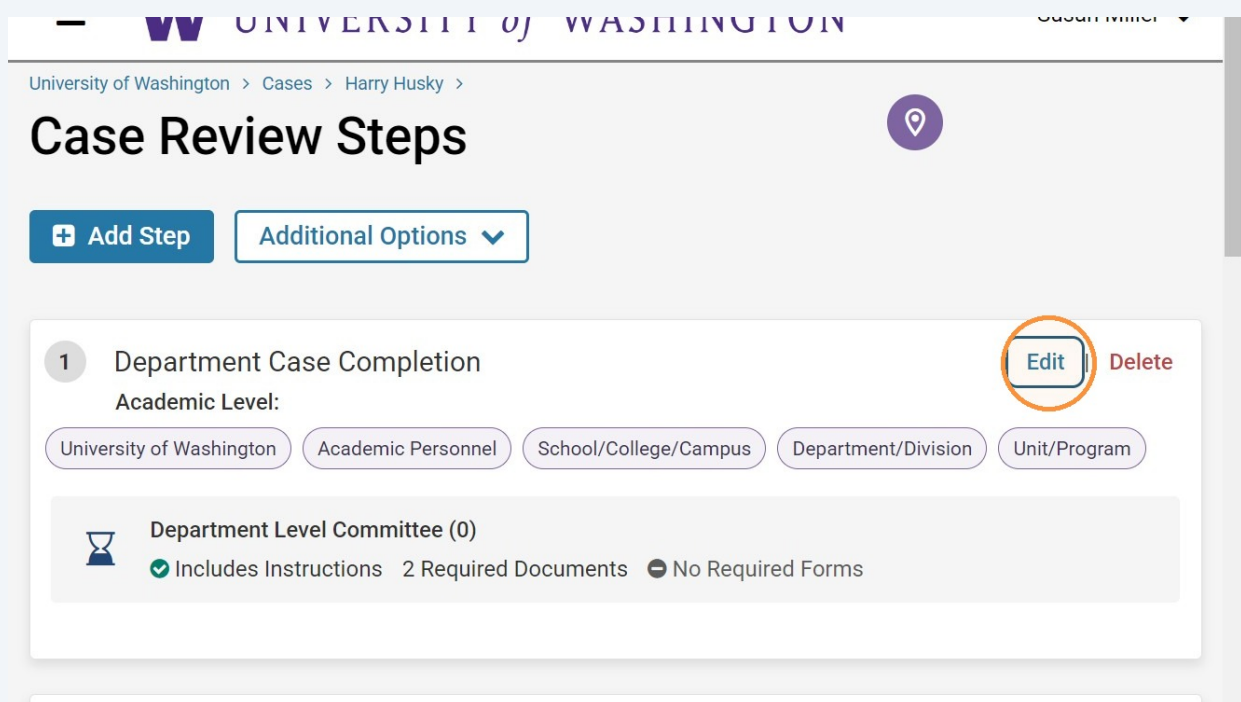
Creating a Case

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

Instructions to the Candidate
Please upload the following documents as individual PDF files:

1. Current curriculum vitae, including bibliography
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)

15 To add your department contact(s), click "Edit" in the Department Case Completion section.



The screenshot shows the "Case Review Steps" page on the University of Washington website. The first step, "Department Case Completion", is selected. The "Edit" button next to it is highlighted with an orange circle. The page includes a breadcrumb trail, a location icon, and a list of academic levels.

University of Washington > Cases > Harry Husky >

Case Review Steps

[+ Add Step](#) [Additional Options](#)

1 Department Case Completion

Academic Level:

[University of Washington](#) [Academic Personnel](#) [School/College/Campus](#) [Department/Division](#) [Unit/Program](#)

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

 Department Level Committee (0)

 Includes Instructions 2 Required Documents  No Required Forms

16

You'll want to add the chair and/or unit admin that will need access to the case to upload documents.

Click "Add Members" and search for the department contacts to add to the case.

Reviewers

[Add Committee](#)

Department Level Committee

[Options](#)

Ad Hoc Committee (0)

[Manage Members](#)[Instructions](#)[Required Documents](#)[Required Forms](#)[Settings](#)

No Members

[Add Members](#)[Return to Case Review Steps](#)

17

Search by name or NetID and click "add" next to the name.

Add Members

[Sort By Name](#)[New](#)

First Name	Last Name	Email
[REDACTED]	[REDACTED]	[REDACTED]@uw.edu
[REDACTED]	[REDACTED]	[REDACTED]

[+ Add](#)

- 18 Click "Return to Case Review Steps"

Add Members

Return to Case Review Steps

- 19 You'll also need to add the Divisional dean for your unit. Click "Add Members" to search and add them to the case and then return to the case review steps.

Reviewers

Add Committee



Divisional Dean

Options ▾

Ad Hoc Committee (0)

Manage Members

Instructions

Required Documents

Required Forms

Settings

 No Members

Add Members

Return to Case Review Steps

20 Click "Return to Case Summary"

Creating a Case

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

Required Documents ☐ No Required Forms

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

Personnel School/College/Campus Department/Division Unit/Program

Susan H. Miller (susanh82@uw.edu)

☐ No Instructions ☐ No Required Documents ☐ No Required Forms

[Continue](#) [Previous](#) [Return to Case Summary](#)

21 Click "Return to Case"

UNIVERSITY of WASHINGTON Susan Miller ▼

University of Washington > Cases > Harry Husky >

Case Summary

[Edit](#)

[Return to Case](#)

Case Information

Type
Reappointment

Name
Harry Husky

Unit
Geography

Email
harry.husky@uw.edu

22

Once your review steps are updated with your department contacts and divisional dean, you'll want to send the case forward to the candidate so they can add their documents. Click "send case" and "Notify Candidate"

The screenshot shows the University of Washington Interfolio case management interface. The header includes the University of Washington logo and the user name 'Susan Miller'. The breadcrumb trail is 'University of Washington > Cases >'. The case title is 'Harry Husky'. The left sidebar contains sections for 'Unit' (Geography), 'Template' (Autumn quarter reappointments 2027-2028), 'Status' (Select Status), and 'Case Materials' (Case Details). The main content area has a 'Send Case' button with a dropdown menu open, showing options: 'Candidate', 'Notify Candidate' (highlighted with an orange circle), 'Forward to', and 'Department Case Completion'. There is also a 'Case Options' button. Below the buttons is a search bar for case materials by title.

23

When sending the case forward to the candidate, you should include a personal message so they receive an email notification that the case is ready.

The screenshot shows the 'Notify Candidate' dialog box. The title is 'Notify Candidate'. The text inside says: '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. Below this is a 'Subject' field with a red asterisk, containing the text 'Autumn reappointment- Documents needed' (highlighted with an orange circle). Below the subject field is a 'Message' field with a red asterisk, containing a rich text editor with a font size of 12pt and various formatting options (bold, italic, link, etc.). At the bottom of the dialog are three buttons: 'Preview', 'Send', and 'Cancel'.

- 24 You can add your own message and then click 'send' when finished.

The screenshot shows a message composition window for a case named "Harry H". The window has a title bar "Message *" and a rich text editor with a toolbar containing options for font size (12pt), bold (B), italic (I), link (x²), bulleted list, numbered list, and a more options menu (three dots). The message body contains the text: "Hello Harry," "Please log into Interfolio to add the necessary documents for your reappointment case." "Thank you," and "Susan". At the bottom of the editor, there is a "P" icon and the text "POWERED BY TINY". Below the editor, there are three buttons: "Preview", "Send" (circled in orange), and "Cancel".

- 25 You will then need to send the case forward to the department case completion step, so your department chair or admin can add documents to the case.

The screenshot shows the "Harry Husky" case page on the University of Washington Interfolio system. The page header includes the University of Washington logo and the name "Susan Miller" with a dropdown arrow. The breadcrumb trail is "University of Washington > Cases >". The case name "Harry Husky" is prominently displayed. Below the name, there are sections for "Unit" (Geography), "Template" (Autumn quarter reappointments 2027-2028), and "Status" (Select Status). There are two tabs: "Case Materials" (selected) and "Case Details". A search bar for "Search case materials by title" is at the bottom. On the right side, there are two buttons: "Send Case" (circled in orange) and "Case Options". A dropdown menu is open under "Send Case", showing the option "Forward to Department Case Completion" (also circled in orange).

26

If you're sending it forward to the chair or a different department member to upload docs, include a message. If you're sending the case forward to yourself to add docs, you don't need to include a message.

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.

Continue Cancel

27

In order to add documents for the department/unit, you will open the case in Interfolio. If you are in the RPT section, you can search for the candidate's name and click on the case.

Cases

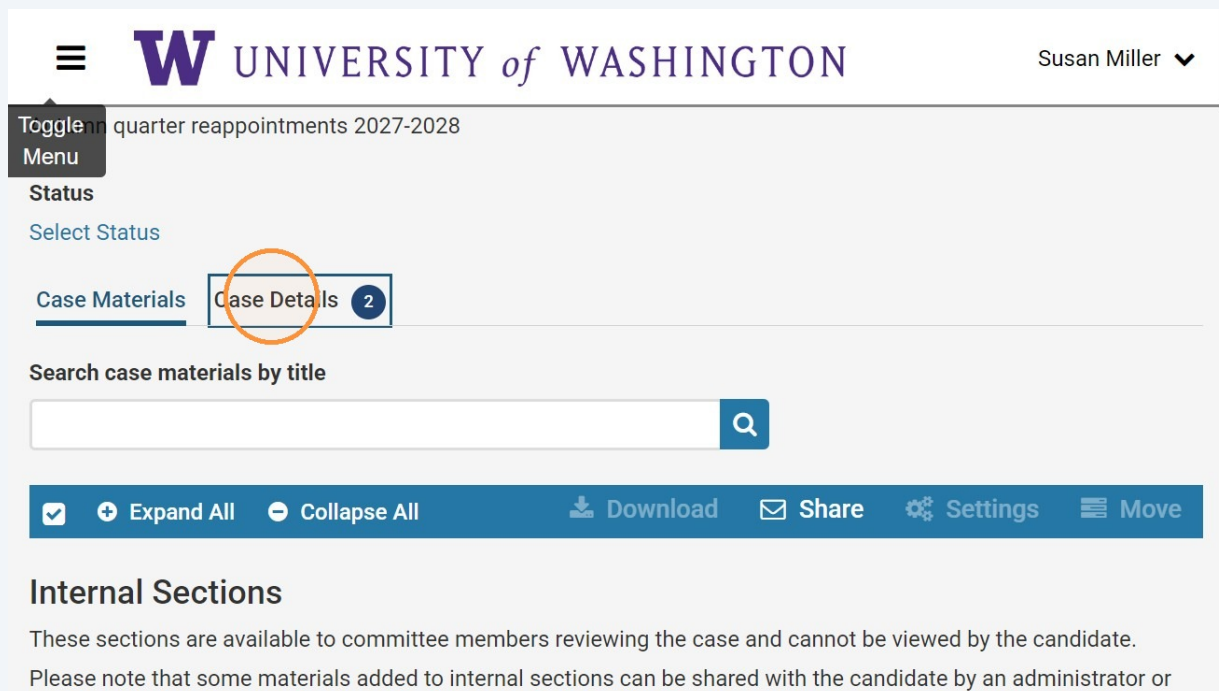
[+ CREATE CASE](#)


[FILTER](#)
[COLUMNS](#)
[Active Cases](#)

MODIFY STATUS CLOSE CASES NOTIFY CANDIDATE SEND BACK SEND FORWARD						
☐	Name ↓	Unit	Case type	Case step	Template name	Case status
☐	Harry Husky harry.husky@uw.edu	Geography	Reappointment	Step 1 of 4: Department Case Completion Missing committee materials	Autumn quarter reappointments 2027-2028	

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When you open the case, you can see that 2 documents are needed for the case details. You can click here to add those.



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Toggle Menu

quarter reappointments 2027-2028

Status

Select Status

Case Materials Case Details 2

Search case materials by title

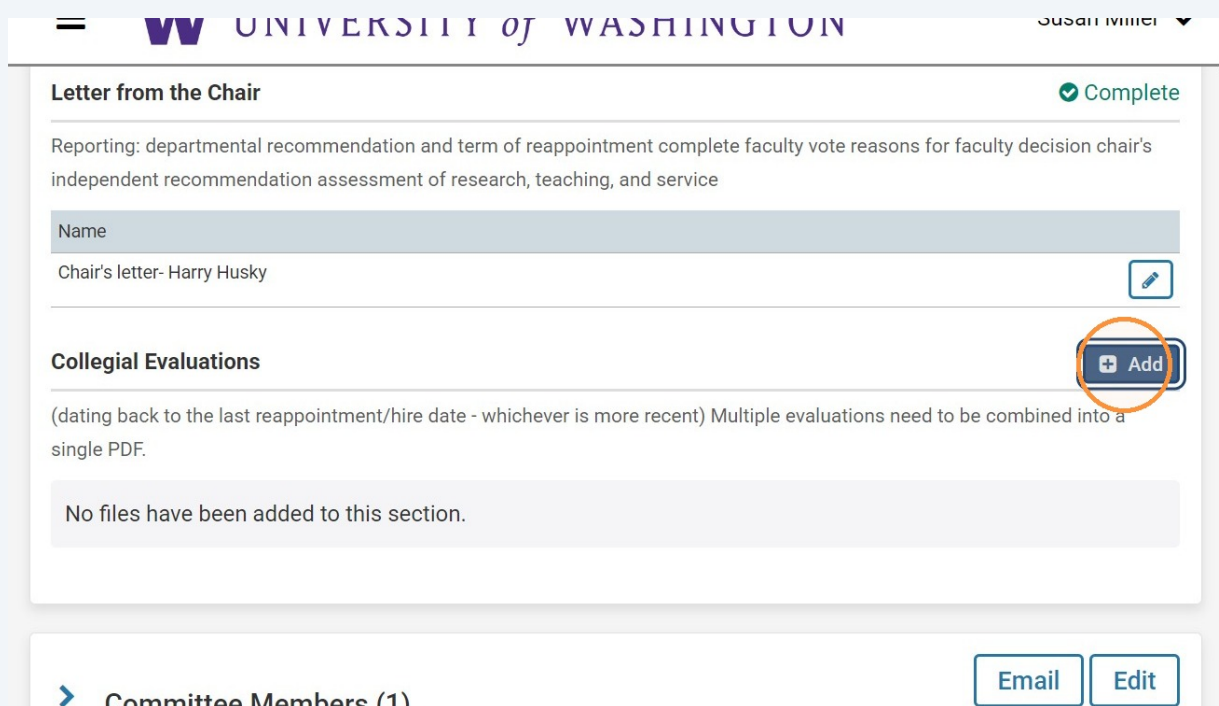
Expand All Collapse All Download Share Settings Move

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

29

You'll need to click 'add' on the right side of the page to add a document to each required section. It will allow you to drag and drop a file or search for one to add to the case. You'll do this for both the chair's letter and collegial evals.



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Susan Miller

Letter from the Chair

Complete

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

Name

Chair's letter- Harry Husky

Collegial Evaluations

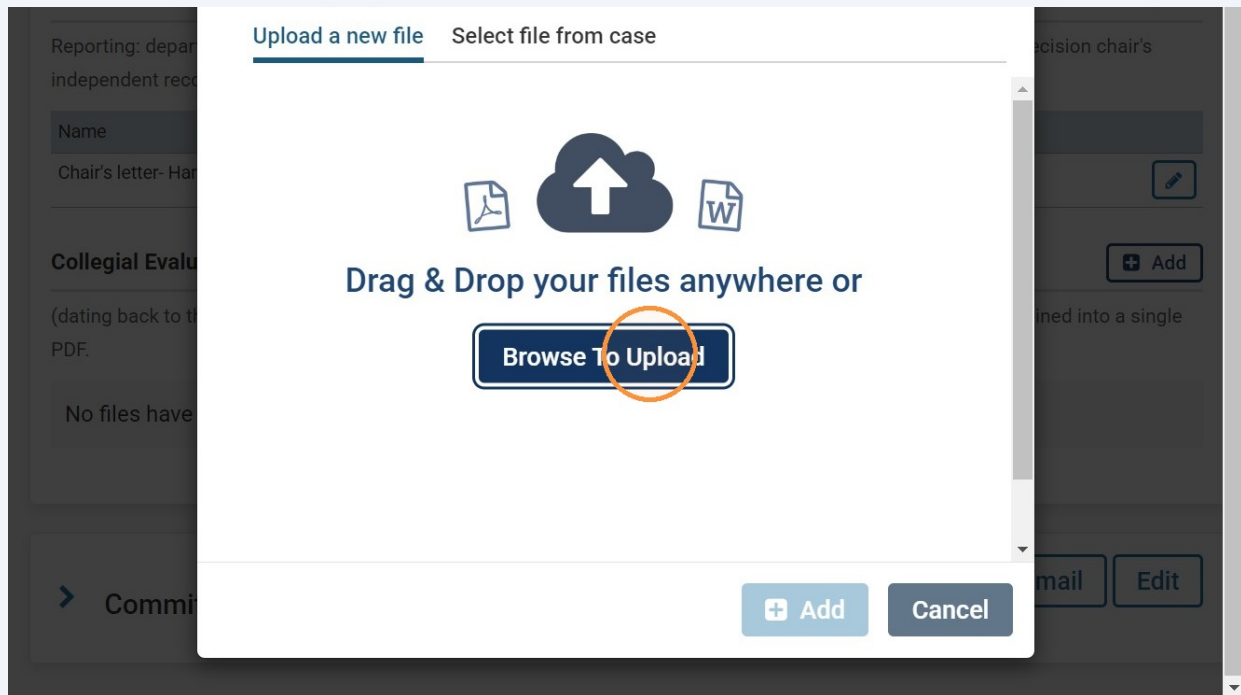
(dating back to the last reappointment/hire date - whichever is more recent) Multiple evaluations need to be combined into a single PDF.

No files have been added to this section.

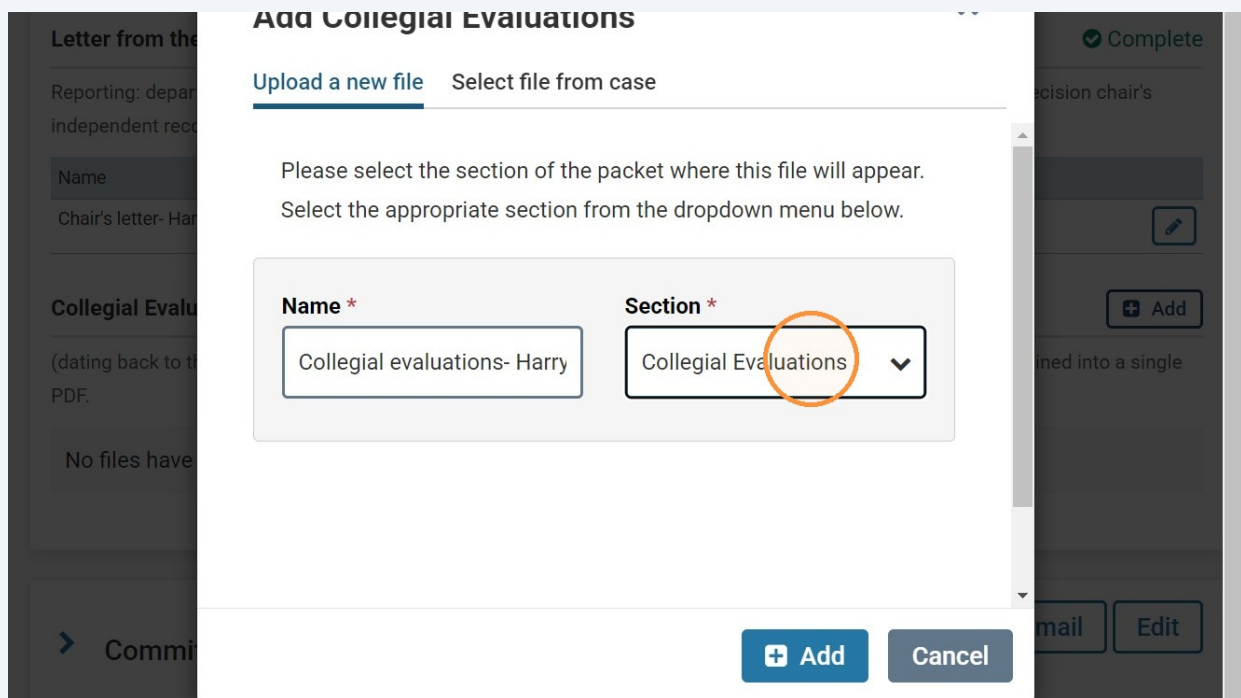
Committee Members (1)

Email Edit

30 Click "Browse To Upload"



31 Depending on which section you're working on, choose the appropriate section to upload.



32 Click "Add"

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 ***

Collegial evaluations- Harry Collegial Evaluations

+ Add Cancel

33 If you have a teaching-track faculty member that requires a teaching matrix, you can enter it in the case materials section.

Harry Husky

Send Case

Case Options

Unit

Geography

Template

Autumn quarter reappointments 2027-2028

Status

Select Status

Case Materials

Case Details

Reviewing as

Department Level Committee

Instructions

34

You can add the file here. There is also a section to add a report for secondary department, if applicable. These are not required for all faculty, so they do not appear in the required case details list (only chair's letter and collegial evals are required for all.)

> Collegial Evaluations

Edit

Add File

> Report from Secondary Department

Edit

Add File

> Teaching Track Faculty Reappointment Matrix

Edit

Add File

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their

35

After you've uploaded all the necessary department documents, you can move the case forward for College review.

≡

W UNIVERSITY of WASHINGTON

Susan Miller ▼

University of Washington > Cases >

Harry Husky

Send Case ▼

Case Options ▼

Forward to
College review

Unit

Geography

Template

Autumn quarter reappointments 2027-2028

Status

Select Status

Case Materials

Case Details

Search case materials by title

Read Case

36

You can send the case forward with or without a message. Click continue and you're done.

The screenshot shows a web interface for reviewing a case. On the left, a sidebar contains the name 'Harry H' and sections for 'Unit' (Geography), 'Template' (Autumn quarter), 'Status' (Select Status), and 'Case Materials' (Search case mat). A central dialog box is open, displaying a confirmation message: 'Great job! You're sending the case forward to the next step, College review. The following reviewers will lose access to the case:'. Below this, a box lists 'Department Level Committee | 1 members'. Another section states 'The following reviewers will gain access to the case:', followed by a box listing 'Susan H. Miller | 1 members'. A checkbox labeled 'Send a message to the reviewers gaining access.' is present, with a note that responses will come to the user's email. At the bottom of the dialog, the 'Continue' button is highlighted with an orange circle, and a 'Cancel' button is also visible. The background interface includes a 'Case Options' dropdown and a 'Move' button.

Harry H

Unit
Geography

Template
Autumn quarter

Status
Select Status

Case Materials
Search case mat

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

Department Level Committee | 1 members

The following reviewers will gain access to the case:

Susan H. Miller | 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.

Continue Cancel

Case Options
Move