

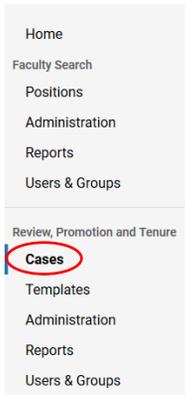
Request to Approve Search

Contents

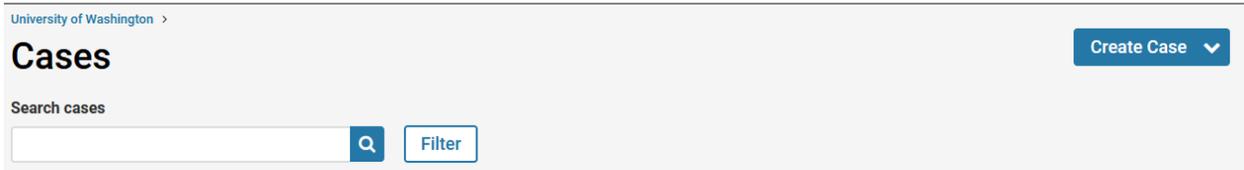
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Create the Case

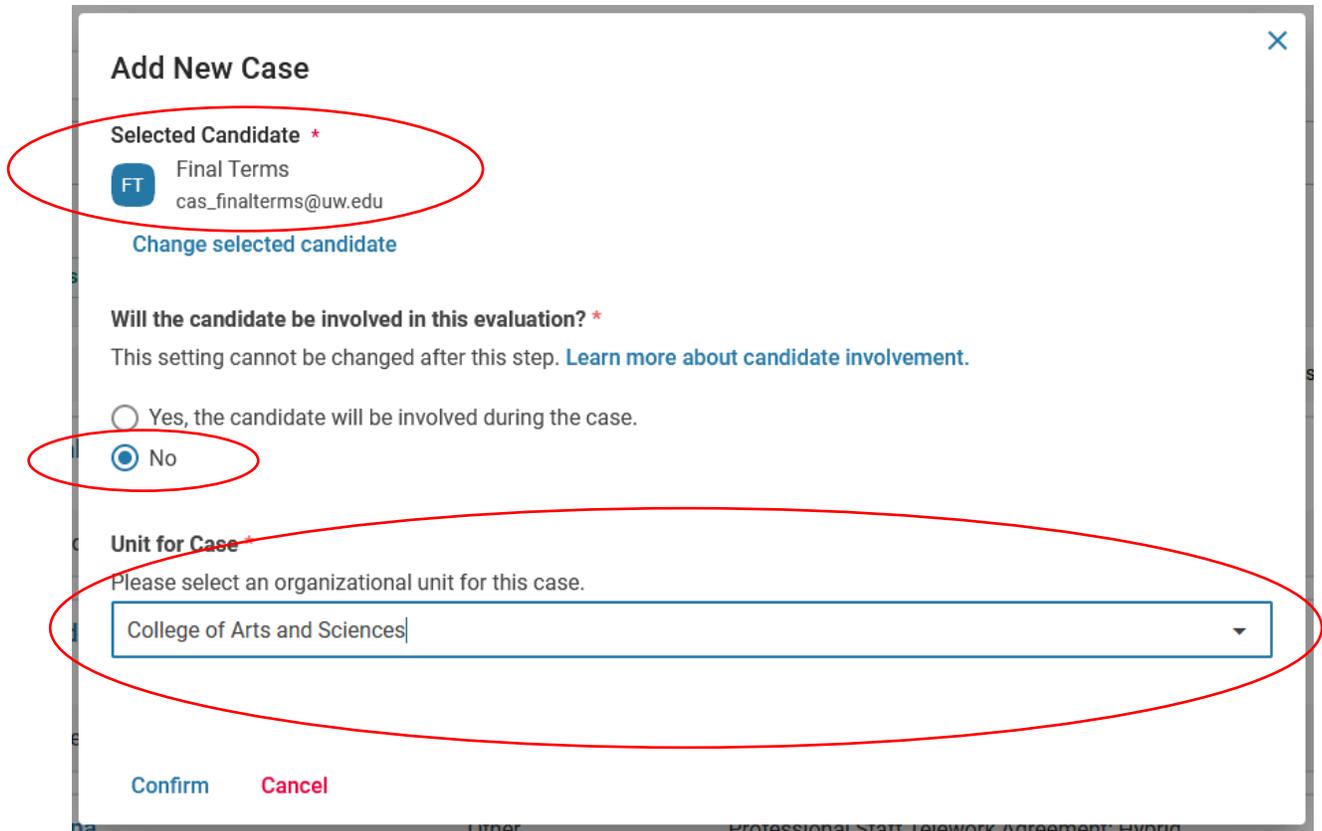
1. Log in to [Interfolio](#) with NetID and password.
2. On the far left, choose 'Cases'



3. Click "Create Case" in the top right corner of the page.



4. Search for the candidate (be sure to use the "Final Terms" candidate name) and choose their name from the drop down, check "no," the candidate will not be involved during the case and enter your unit name. Click "Confirm."

A screenshot of the 'Add New Case' form. The form has a title 'Add New Case' and a close button in the top right corner. The first field is 'Selected Candidate *' with a dropdown menu showing 'Final Terms' and 'cas_finalterms@uw.edu' (circled in red). Below this is a 'Change selected candidate' link. The second field is 'Will the candidate be involved in this evaluation? *' with two radio buttons: 'Yes, the candidate will be involved during the case.' and 'No' (circled in red). The third field is 'Unit for Case *' with a dropdown menu showing 'College of Arts and Sciences' (circled in red). At the bottom are 'Confirm' and 'Cancel' buttons.

5. Choose the “Final Terms of New Employment Offer” template. ****Please do not create new templates****

Create the case – Part 1: Case Information

6. **Do not make changes to this portion.** Hit “Save & Continue” at the bottom of the page

University of Washington > Cases > Final Terms >

Case Information

Type *

Other

Candidate Information

Candidate

FT Final Terms
cas_finalterms@uw.edu

Will the candidate be involved in this evaluation?
No, the candidate will not 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 the case – Part 2: Internal Case Sections

7. **Do not make changes to this portion.** Hit “Continue” at the bottom of the page

University of Washington > Cases > Final Terms >

Internal Case Sections

Create sections to help committee members or individual users organize the materials they add as part of the review. The sections you create here will not be visible to the candidate. You can set up specific requirements for the reviewers of the case in the Case Review Steps. For Examples or more guidance, see [Required Documents for Review Steps](#).

Settings

Internal case sections will appear:

Above the candidate packet

Below the candidate packet

Sections

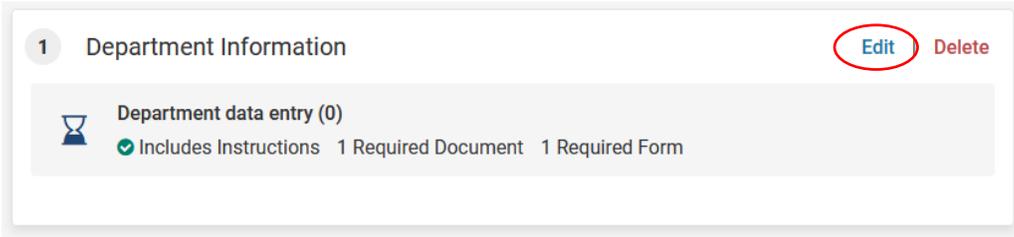
Final Terms	in use	Edit	Remove
Offer and acceptance		Edit	Remove

[+ Add Section](#) [Add External Evaluations Section](#)

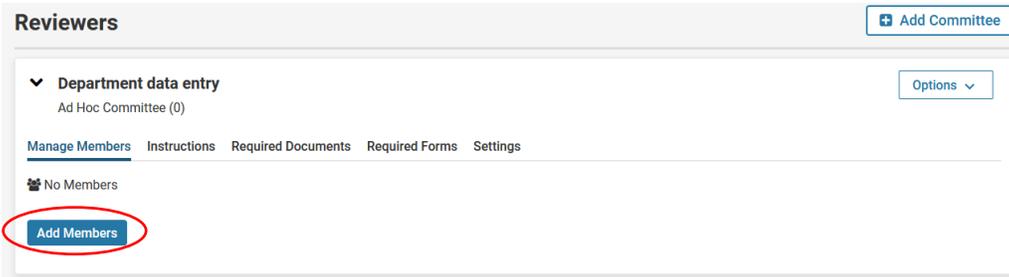
[Continue](#) [Previous](#) [Return to Case Summary](#)

Create your case – Part 3: Case Review Steps

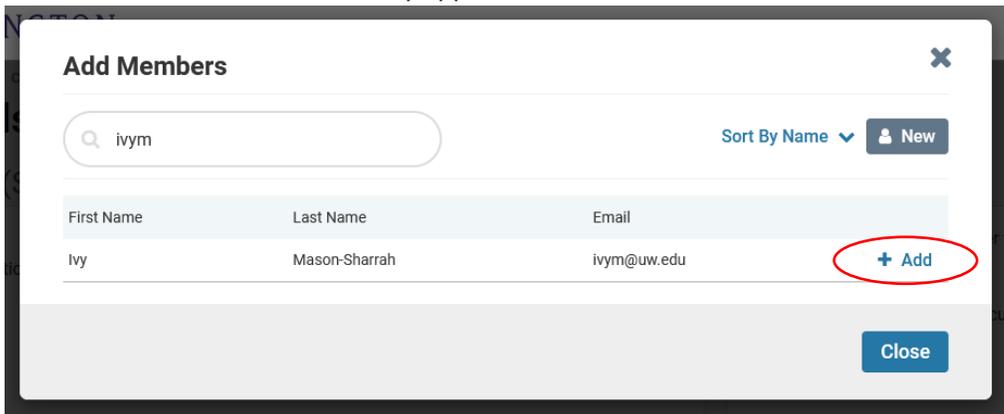
8. Choose “Edit” on Step 1: Department data entry



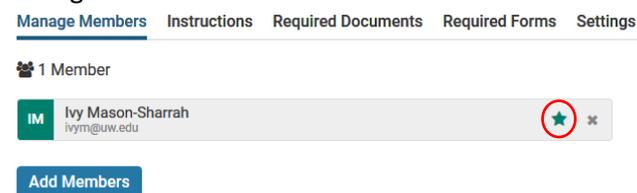
9. Click “Add Members”



10. Search for the name of the individual in your unit who will complete the Final Terms form (this could be the Chair/Director, Administrator, etc.). Search by first name, last name, or email address and click “Add” when they appear in the list then close the window.



11. Once added, click the star next to the Individual’s name to ensure they have Committee Manager access to fill out the form



12. Click “Return to Case Review Steps” at the bottom of the page
13. Repeat steps 8-12 to add your Divisional Dean in Approver Step 3: Divisional Dean Review.
14. Scroll to the bottom of the page and click ‘Continue’

Create your case – Part 4: Case Summary

15. Choose “Return to Case”

University of Washington > Cases > Final Terms >

Case Summary

[← Return to Case](#)

Case Information		Edit
Type	Name	
Other	Final Terms	
Unit	Email	
College of Arts and Sciences	cas_finalterms@uw.edu	

Internal Case Sections		Edit
Final Terms	In Use	
Offer and acceptance		

Case Review Steps		Edit
1	Case Information	
2	Internal Case Sections	
3	Case Review Steps	
4	Case Summary	

16. Click “Send Case” and then “Forward to Department Information”

University of Washington > Cases >

Final Terms

Unit: College of Arts and Sciences Template: Final Terms of New Employment Offer

[Send Case](#) [Case Options](#)

Forward to Department Information

Case Materials Case Details

Search case materials by title

17. Send Case Forward

- You can choose to send the case forward with a message, or not, as you see fit. When complete, click “Continue” at the bottom

Send Case Forward

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

Case is Being Created | 0 members

The following reviewers will gain access to the case:

Department Chair | 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-Shamah

body

[Preview](#) [Continue](#) [Cancel](#)

Stage 2: Department Information Entry

- Once the case has been sent forward to the individual who will enter the search request form, there are two ways to access the case. If an email was sent when the case was moved forward, there will be a link in the email. If it was not, then the individual can log in to Interfolio and access the case from their home screen in Interfolio.

2. Once the case is opened, navigate to the “Case Details” tab

Final Terms Send Case Case Options

Unit
College of Arts and Sciences

Template
Final Terms of New Employment Offer

Status
[Select Status](#)

[Case Materials](#) [Case Details 2](#)

Search case materials by title

3. Click “Add” to upload the Offer & Acceptance

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. 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.

Offer, acceptance, and any other supporting documents as needed Add

Attach all supporting documentation for each commitment. This includes, but is not limited to, the offer, email exchanges regarding commitments, endowment agreements, etc.

No files have been added to this section.

Forms

4. Drag & Drop or upload necessary files.

Add Offer, acceptance, and any other supporting documents as needed

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

Drag & Drop your files anywhere or

[Browse To Upload](#)

Add Cancel

5. Specify the section as “Offer and Acceptance” and click “Add”

Add Offer, acceptance, and any other supporting documents as needed

[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 *

Add Cancel

6. Choose "Fill out Form" for the Final Terms of Offer form

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.

Offer, acceptance, and any other supporting documents as needed Complete

Attach all supporting documentation for each commitment. This includes, but is not limited to, the offer, email exchanges regarding commitments, endowment agreements, etc.

Name
Offer/Acceptance

Forms

Form Name	Assignee	Actions
Final Terms of Offer 15 required questions	Committee Members	Manage Respondents
Final Terms of Offer 15 required questions	Ivy Mason-Sharrah (You)	Fill Out Form

7. Fill out all required fields in the form and click "Submit Form" at the bottom.

8. Click 'Yes' on the confirmation window that pops up

Confirm

Submitting the form "Final Terms of Offer" will make your responses available to the appropriate members for review. You will be able to change or edit your responses while the case is at the current step.

[Yes](#) [No](#)

9. Send case forward to Deans Office Review

University of Washington > Cases >

Final Terms

[Send Case](#) [Case Options](#)

Unit
College of Arts and Sciences

Template
Final Terms of New Employment Offer

[Forward to Dean's office Review](#)
[Select Status](#)

[Case Materials](#) [Case Details](#)

10. Please send the case with a message to ensure that the Dean's office knows that the case is with them. When complete, click "Continue" at the bottom of the screen.

11. Congratulations! The case is now with the Dean's office.