

# How to Create a Case and Notify Reviewers Scribe<sup>®</sup> and Candidates

1 Navigate to [rpt.interfolio.com/28343/cases/create](https://rpt.interfolio.com/28343/cases/create)

2 Click **+ SELECT CANDIDATES**

Administration

Select Candidate(s)

Select Template

Review & Settir

Reports

Users & Groups

Review, Promotion and Tenure

**Cases**

Templates

Administration

Reports

Users & Groups

## Candidate Information

### Selected Candidates

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

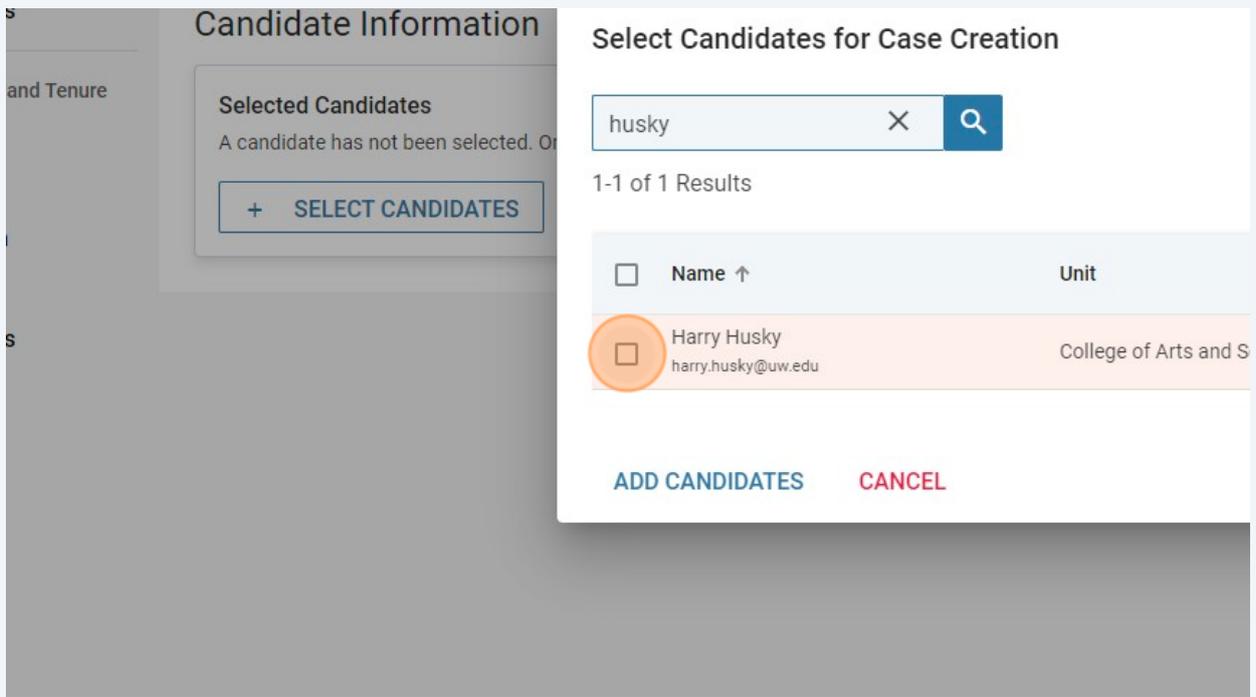
**+ SELECT CANDIDATES**

3 Click the "Search" field.

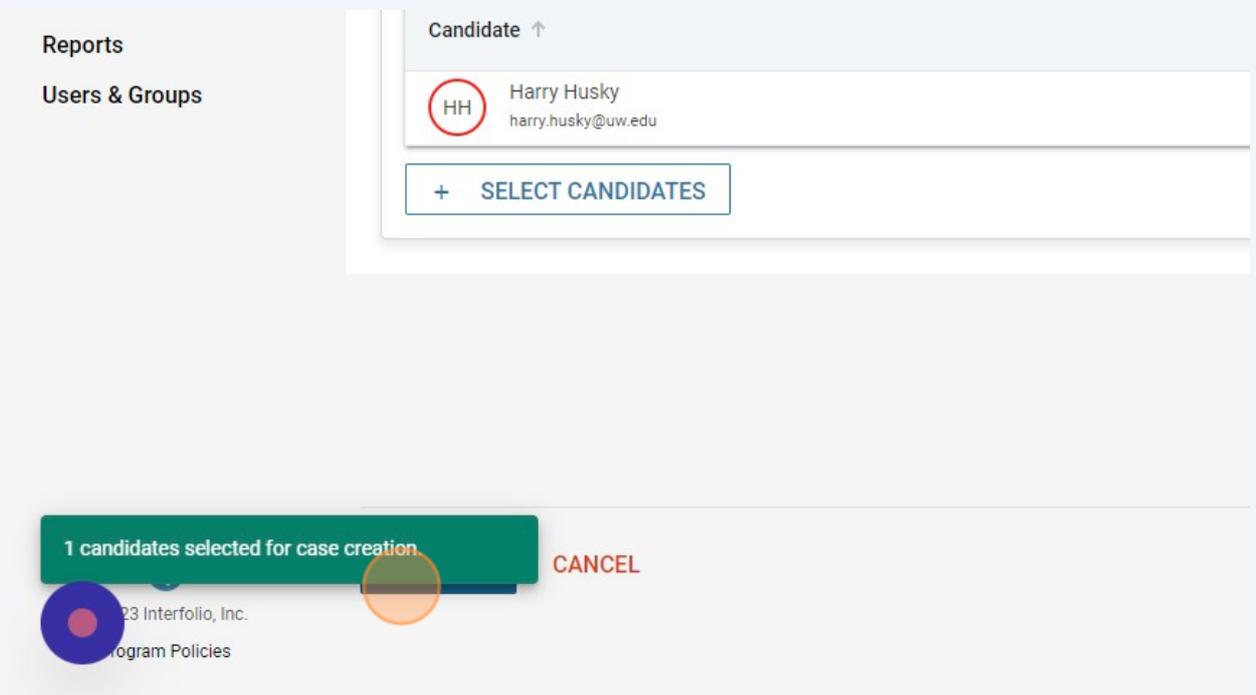
The screenshot shows the 'Create Cases' page on the University of Washington website. The page title is 'UNIVERSITY of WASHINGTON'. Below the title, there is a breadcrumb 'University of Washington > Case'. The main heading is 'Create Cases'. A red circle with the number '1' is placed over a search input field labeled 'Search' in a modal window titled 'Select Candidates for Case Creation'. The modal also shows '1-10 of 12177 Results' and a list of candidates with checkboxes and names: Sheida Aalami (sheida@uw.edu), Kirsten Aaland (kirsten.aaland@va.gov), and Rebecca Aanerud (raan@uw.edu). In the background, the 'Candidate Information' section shows 'Selected Candidates' with the message 'A candidate has not been selected. Or' and a '+ SELECT CANDIDATES' button.

4 Type the first name, last name, or net ID of the individual for whom you are creating the case - **ENTER**

5 Select the appropriate individual.



6 Click **CONTINUE**  
\*Note - multiple cases can be created at once by selecting multiple individuals.



7 Click the "Unit for Case(s)" field.

- Positions
- Administration
- Reports
- Users & Groups

Review, Promotion and Tenure

- Cases
- Templates
- Administration
- Reports
- Users & Groups

Select Candidate(s)

Select Template

Review & Settings

### Select Case Settings

**Unit for Case(s) \***

Cases can only be created in one unit.

**Type**

### Select Template

Templates are based on the unit and case type chosen in the case settings.

8 Choose the appropriate home department.

- Administration
- Reports
- Users & Groups

Review, Promotion and Tenure

- Cases
- Templates
- Administration
- Reports
- Users & Groups

Select Candidate(s)

Select Template

Review & Settings

### Select Case Settings

**Unit for Case(s) \***

Cases can only be created in one unit.

College of Arts and Sciences

ARTS DIVISION

Art, Art History & Design

DXARTS

Dance

Drama

Music

RPT: Burke Museum

9 Click the "Type" field.

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

### Select Case Settings

**Unit for Case(s) \***

Cases can only be created in one unit.

College of Arts and Sciences

**Type**

--

### Select Template

Templates are based on the unit and case type chosen in the case settings.

Search



1-20 of 20 Templates

10 Click "Other"

Reports

Users & Groups

**Type**

↑

Reappointment

Review

Sabbatical

Tenure

Other

template information



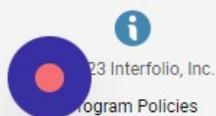
**Custom Case**

Create a unique case by customizing forms and workflow steps rather than using



**Autumn quarter reappointments**

For a list of titles and instructions, see <https://admin.artsci.washington.edu/reap>



11

Choose the correct template based on the employee type and the hybrid arrangement.

- Home
- Your Packets
- Faculty Search
- Positions
- Administration
- Reports
- Users & Groups

Review, Promotion and Tenure

- Cases
- Templates
- Administration
- Reports
- Users & Groups

Search 

1-12 of 12 Templates

Template Information ↑

- Custom Case  
Create a unique case by customizing forms and workflow steps rather than using a template.
- Professional Staff Telework Agreement: Hybrid, Occasional or Ad Hoc Telework  
To be submitted for approval of a professional staff telework agreement.
- Classified Staff Telework Agreement: Hybrid, Occasional or Ad Hoc Telework  
To be submitted for approval of a classified staff telework agreement.
- Professional Staff Telework Agreement: 100% Remote  
To be submitted for approval of a professional staff telework agreement.
- Classified Staff Telework Agreement: 100% Remote  
To be submitted for approval of a classified staff telework agreement.
- Post-doc Telework Agreement: 100% Remote  
To be submitted for approval of a post-doc telework agreement.

12

Click **CONTINUE**

- Reports
- Users & Groups

- ASE Telework Agreement: 100% Remote  
To be submitted for approval of an ASE telework agreement.
- Post-doc Telework Agreement: Hybrid, Occasional or Ad Hoc Telework  
To be submitted for approval of a post-doc telework agreement.
- ASE Telework Agreement: Hybrid, Occasional or Ad Hoc Telework  
To be submitted for approval of an ASE telework agreement.
- 2022-2023 Search Approval  
Approval to search must be granted by the Dean's office prior to competitive recruitment.
- Final Terms of New Employment Offer  
Complete this form when a candidate has accepted a permanent employment offer.
- 2023-2024 Search Approval  
Approval to search must be granted by the Dean's office prior to competitive recruitment.



**CONTINUE** PREVIOUS CANCEL

13 Click **CREATE 1 CASE**

Reports

Users & Groups

### 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 instructor

Yes

No



**CREATE 1 CASE**

PREVIOUS

CANCEL

14 Click **CASE OPTIONS**

Ivy Mason-Sharrah ▾

Send Case ▾

**Case Options** ▾

Status

ybrid,

Select Status



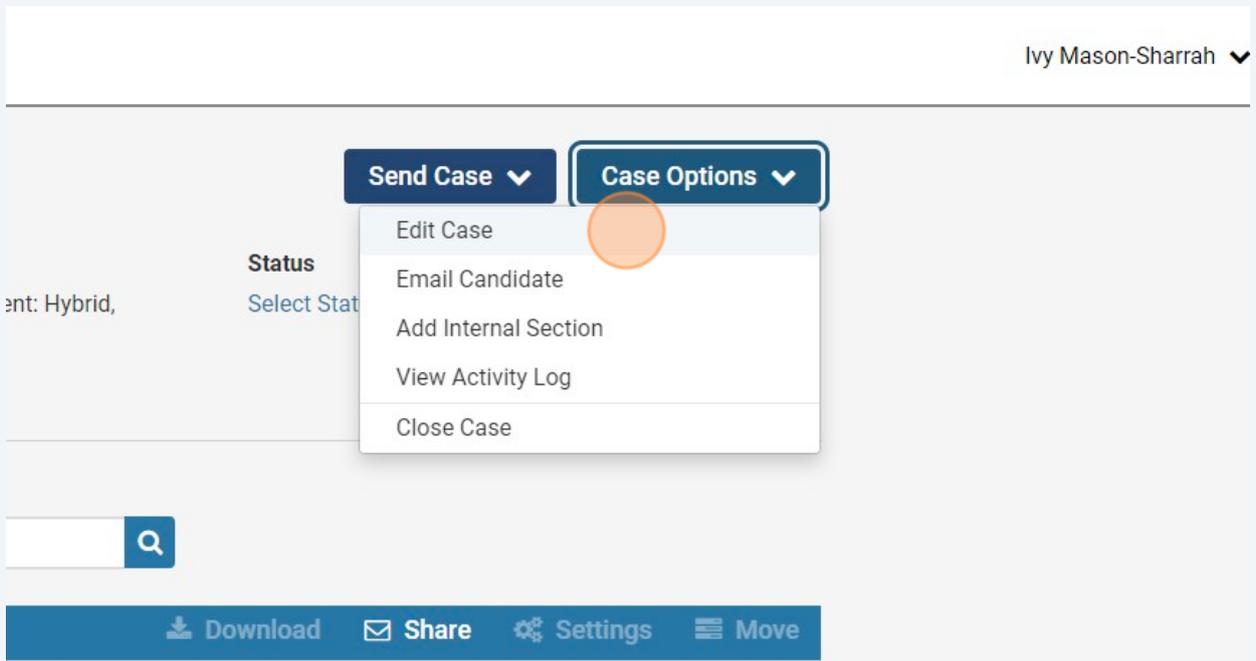
Download

Share

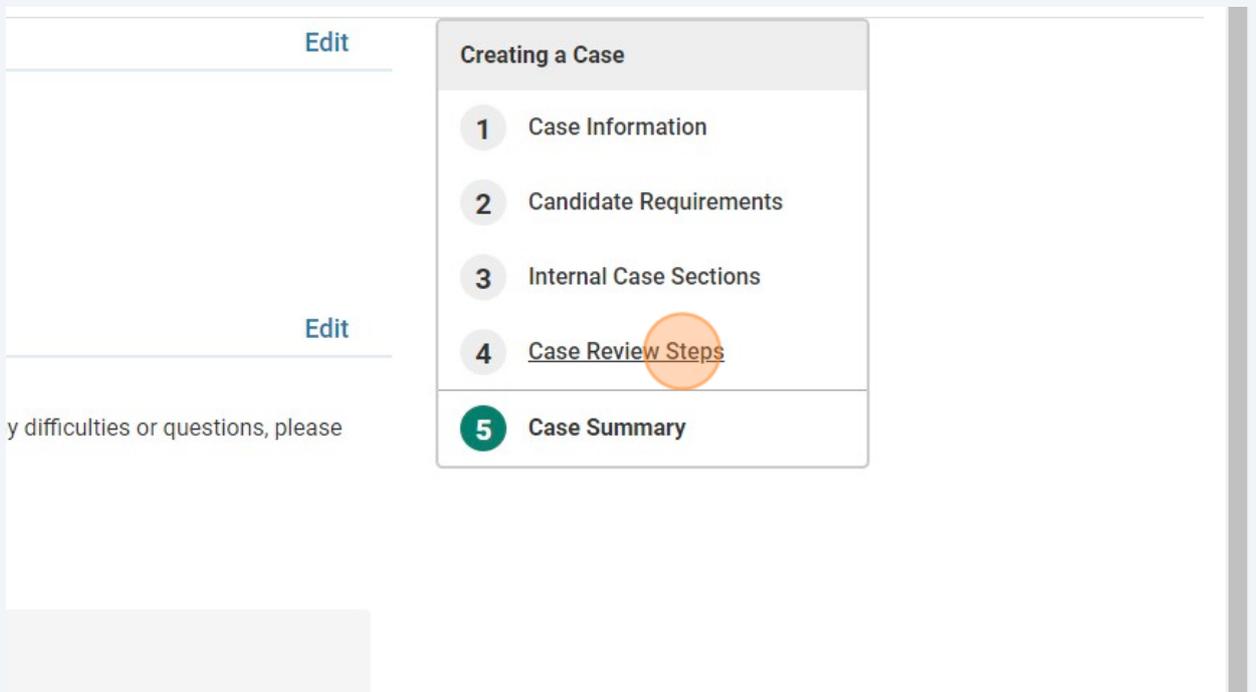
Settings

Move

15 Click **EDIT CASE**



16 Click **CASE REVIEW STEPS** from the list on the far right of the screen.



17 Click **EDIT**

usky >

ps

tions ▾

Washington Academic Personnel of UW School/College/Campuses

No Required Documents 1 Required Form

Edit | Delete

Creating a Case

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

r Director)

Edit | Delete

18 Click **ADD MEMBERS** under the Supervisor step.

Reports

Users & Groups

Supervisor

Ad Hoc Committee (0)

Manage Members Instructions Required Documents Required Forms

No Members

Add Members

Return to Case Review Steps

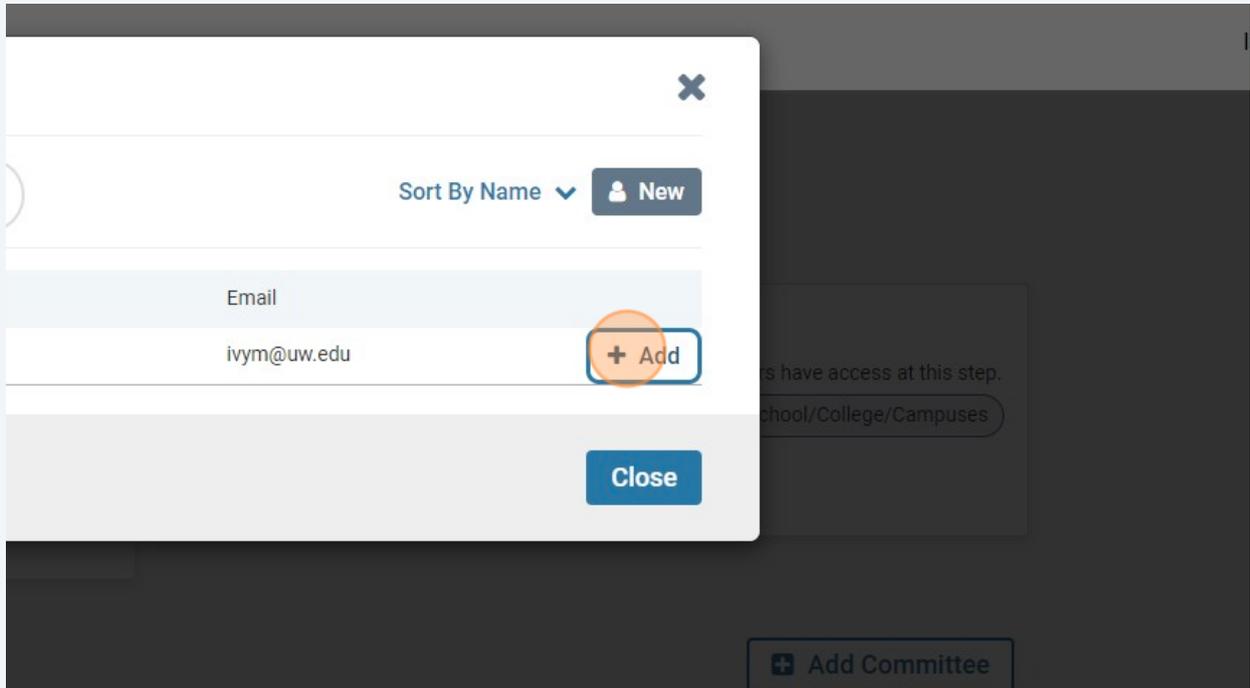


19

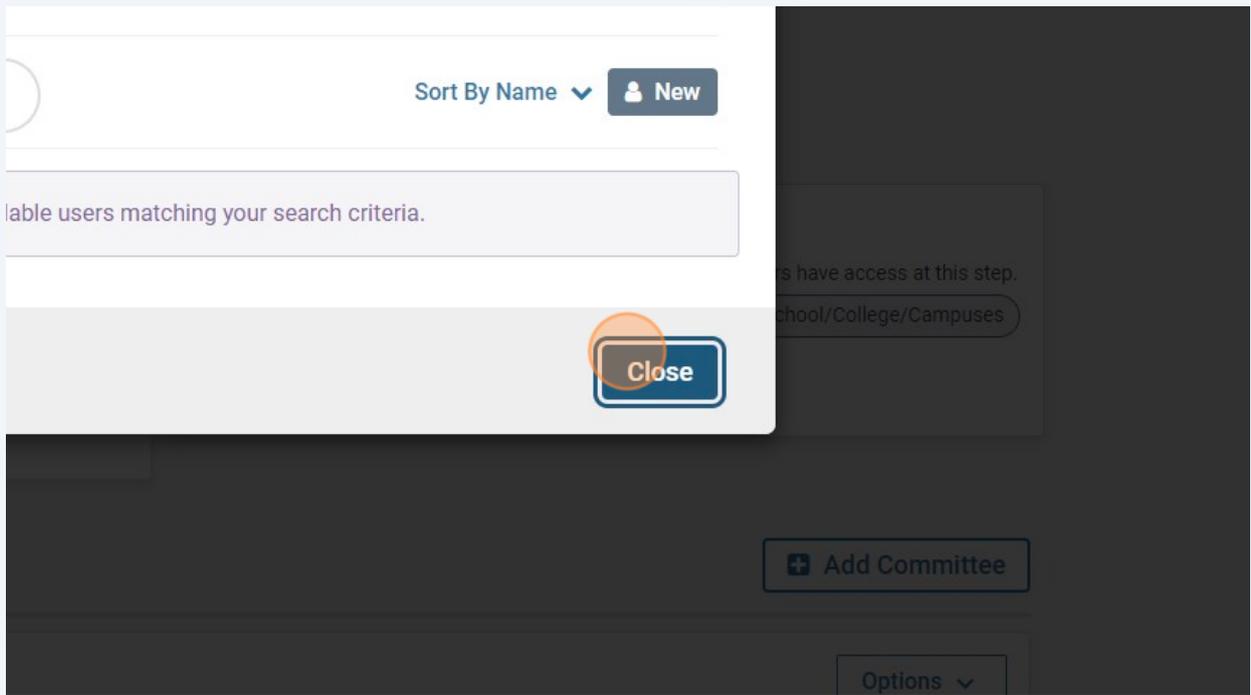
Type the first name, last name, or net ID of the supervisor in the "search users" field - **ENTER**

20

Click **+ADD** next to the appropriate individual.



21 Click **CLOSE**



22 Click **RETURN TO CASE REVIEW STEPS**

Reports

Users & Groups

▼ **Supervisor**  
Ad Hoc Committee (1)

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

👤 1 Member

**IM** Ivy Mason-Sharrah  
ivym@uw.edu

[Add Members](#)



[Return to Case Review Steps](#)

23 Click **EDIT** on the Unit Leadership step.

Washington Academic Personnel of UW School/College/Campuses [Edit](#) | [Delete](#)

No Required Documents 1 Required Form

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

Director) Washington Academic Personnel of UW School/College/Campuses [Edit](#) | [Delete](#)

Required Documents - No Required Forms

24 Click **ADD MEMBERS**

- Reports
- Users & Groups

Unit Leadership  
Ad Hoc Committee (0)

[Manage Members](#) [Instructions](#) [Required Documents](#) [Required Fo](#)

No Members

[Add Members](#)

[Return to Case Review Steps](#)

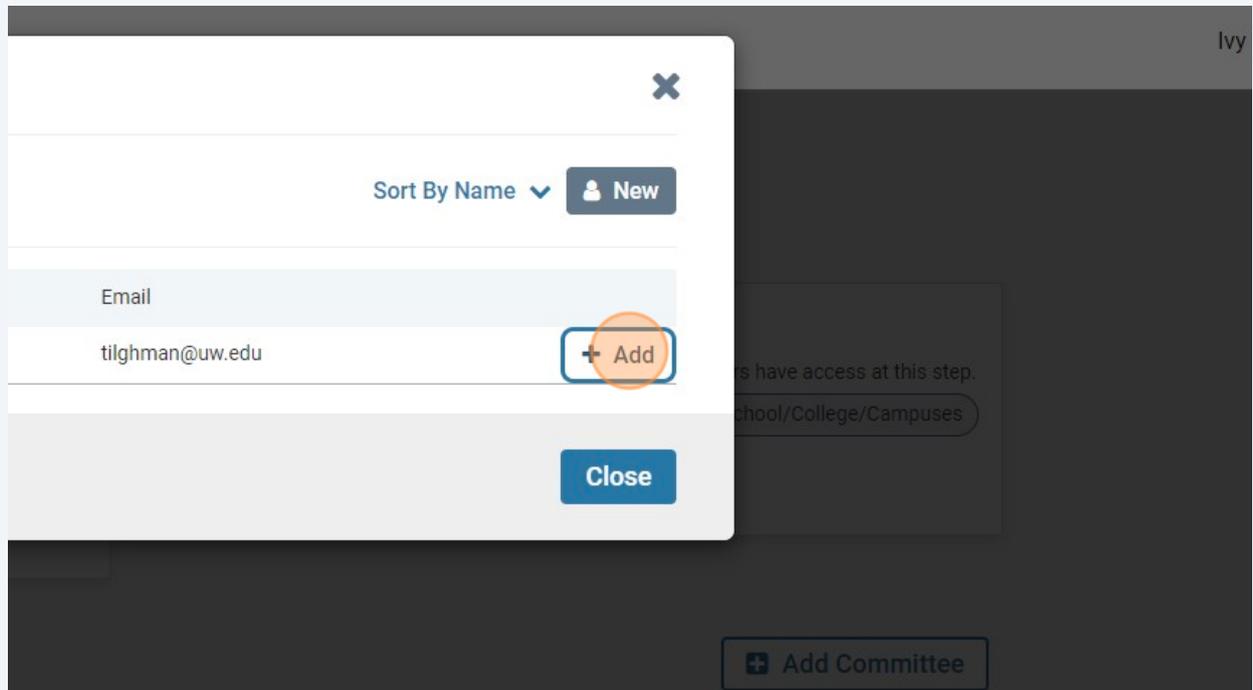


25

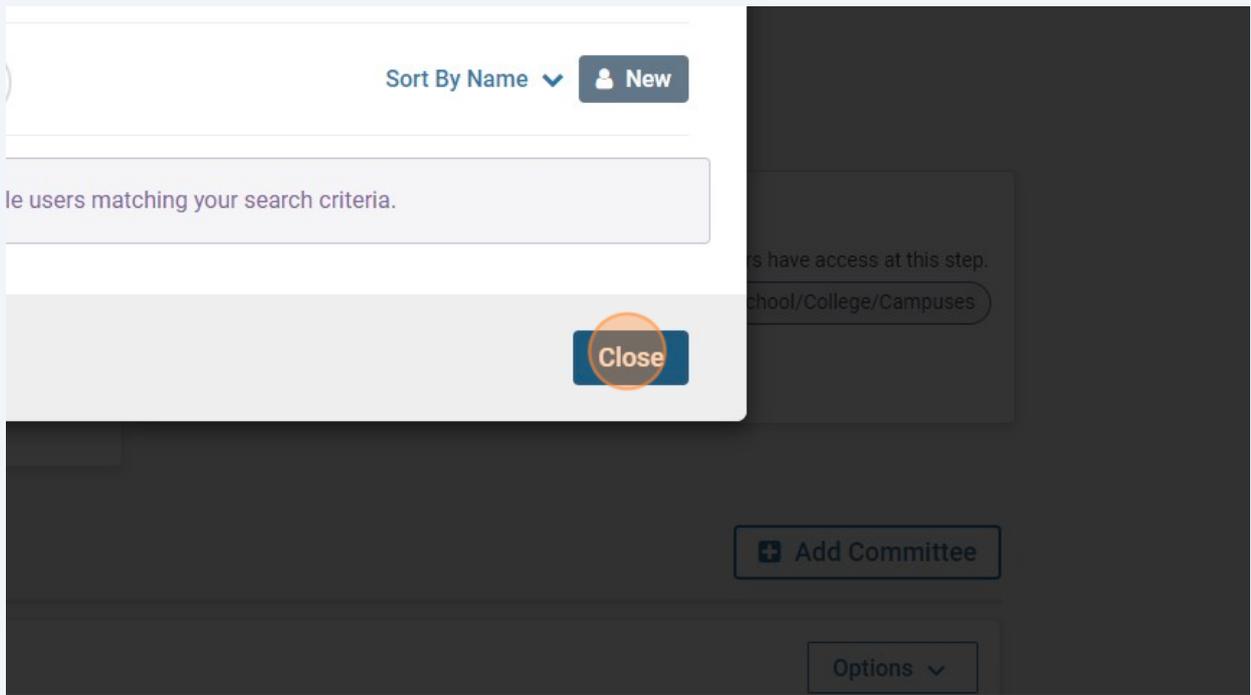
Type the first name, last name, or net ID of the unit leadership in the "search users" field - **ENTER**

26

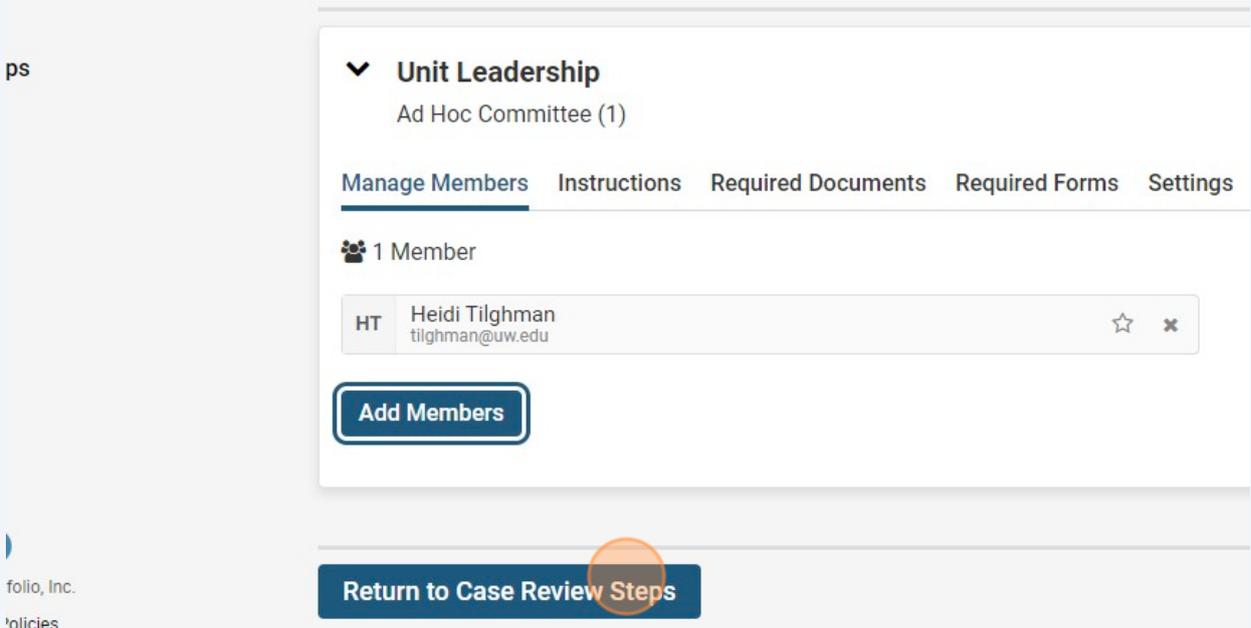
Click **+ADD** next to the appropriate individual.



27 Click **CLOSE**



28 Click **RETURN TO CASE REVIEW STEPS**



29 Click the name of the individual at the top of the page.

UNIVERSITY of WASHINGTON

University of Washington > Cases > Harry Husky >

## Case Review Steps

+ Add Step

Additional Options ▾

1 Supervisor

Academic Level: University of Washington Academic Personnel of UW School/College/C



Supervisor (1)

✓ Includes Instructions    ✖ No Required Documents    1 Required Form

Signature

30 Click **SEND CASE**

Ivy Mas

Send Case ▾

Case Options ▾

Status

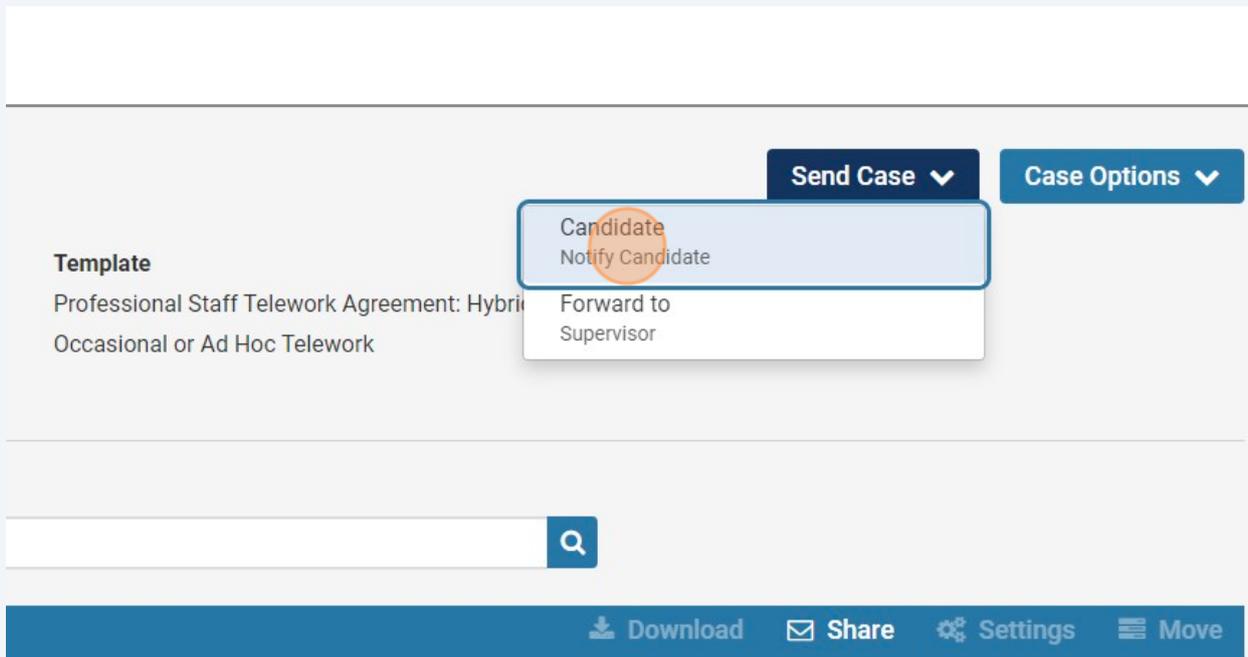
Work Agreement: Hybrid,  
Telework

Select Status

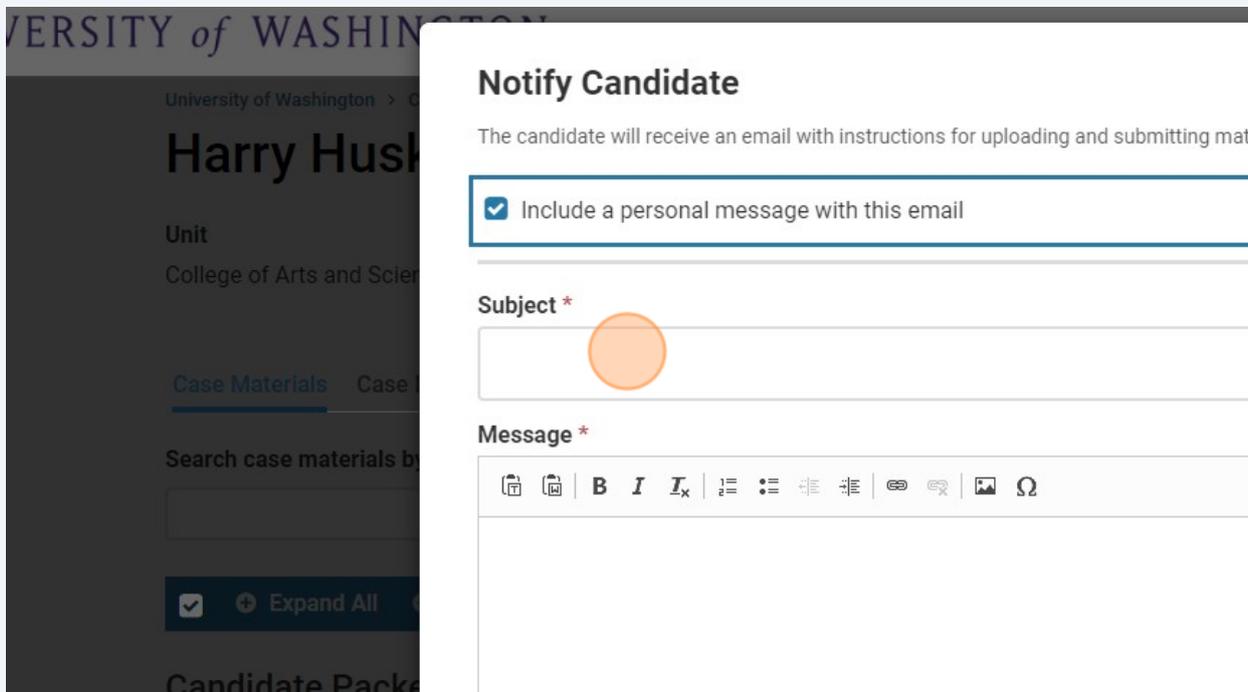


Download Share Settings Move

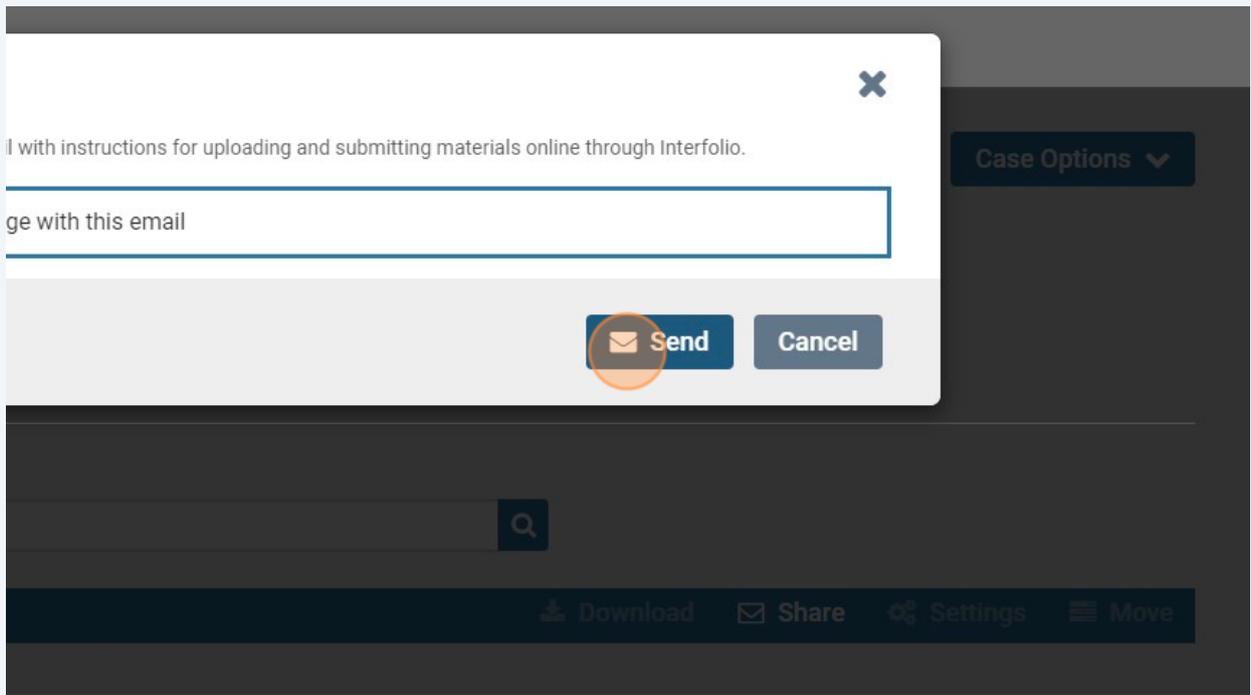
31 Click **NOTIFY CANDIDATE**



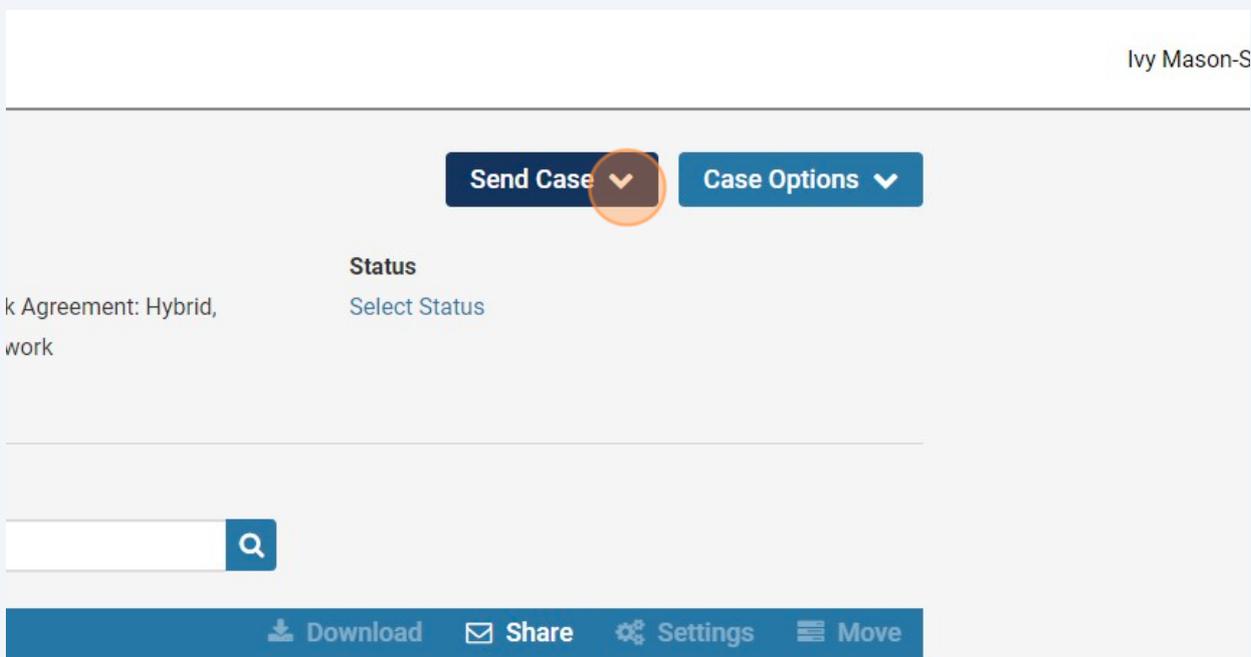
32 You can choose to include a personal message to the candidate or not.



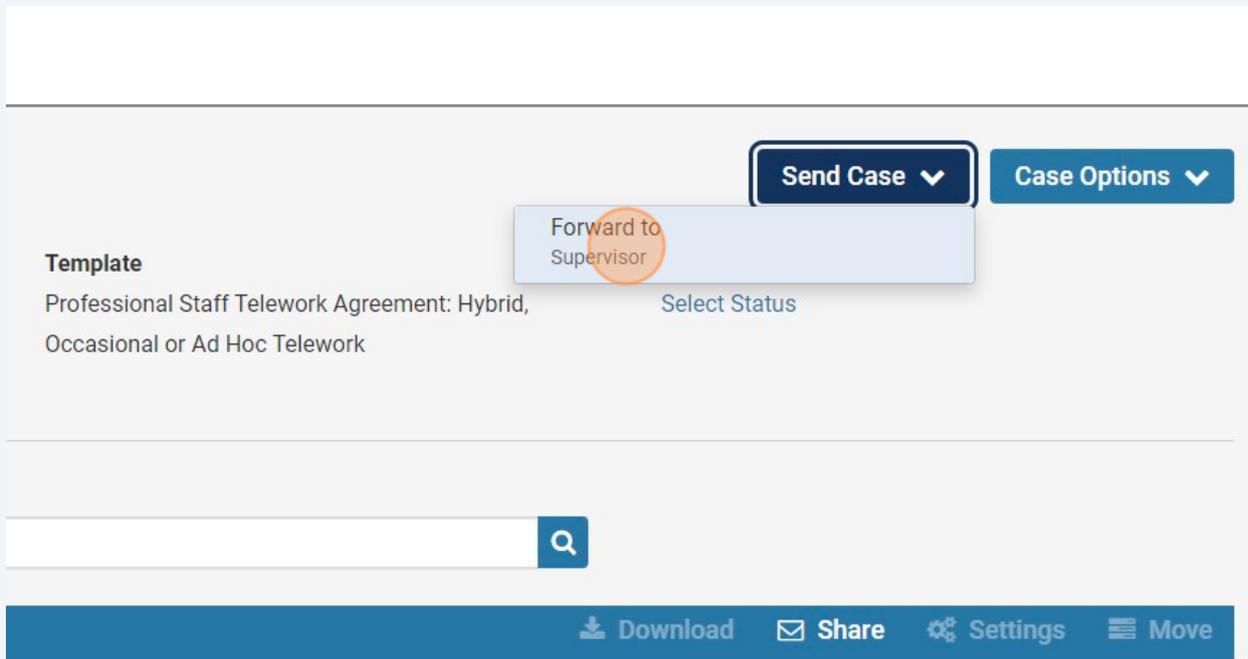
33 Click **SEND**



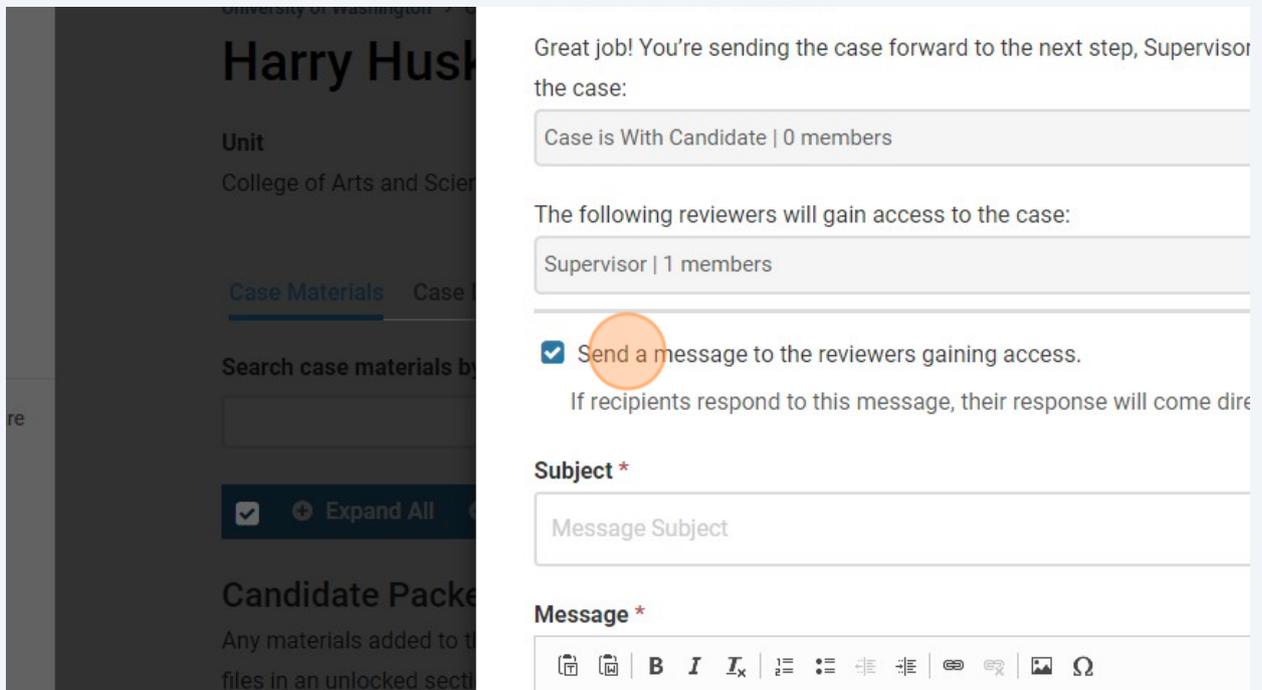
34 Click **SEND CASE**



35 Click **FORWARD TO SUPERVISOR**



36 You can choose to send a personal message the supervisor or not.



**37** Click "Continue"

ccess to the case:

ers gaining access.

ssage, their response will come directly to your email inbox.

Continue

Cancel

candidate and available for them to use in their current case. The candidate will be able to replace or delete any

Lock

Add File

**38** Now the case is complete.