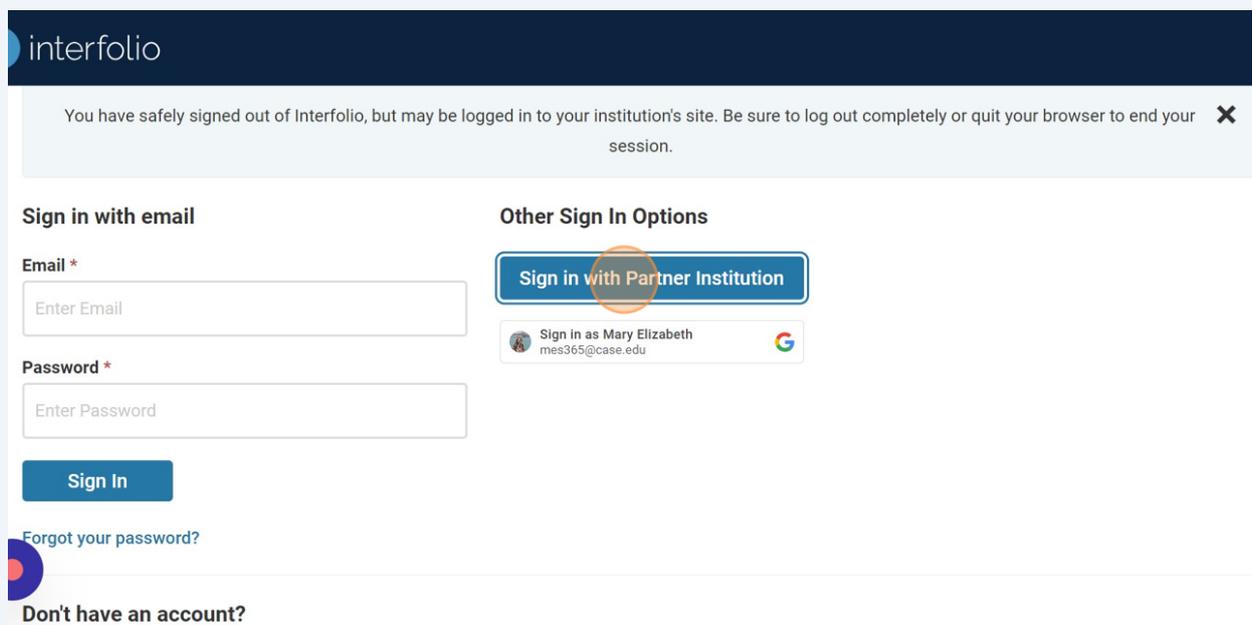


# How to Create a Case in Interfolio

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

2 Click "Sign in with Partner Institution"



The screenshot shows the Interfolio login interface. At the top, the Interfolio logo is displayed. Below it, a message states: "You have safely signed out of Interfolio, but may be logged in to your institution's site. Be sure to log out completely or quit your browser to end your session." The main login area is divided into two sections: "Sign in with email" and "Other Sign In Options". The "Sign in with email" section contains fields for "Email \*" and "Password \*", a "Sign In" button, and a link for "Forgot your password?". The "Other Sign In Options" section features a prominent blue button labeled "Sign in with Partner Institution" which is circled in orange. Below this button is a "Sign in as" option for "Mary Elizabeth" with the email "mes365@case.edu" and a Google logo.

### 3 Click "Search for your institution"

interfolio Already have an account?

**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.

Search for your institution

[Sign In](#)

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

[Sign Up](#)

Don't have an account? Sign up now. Use Interfolio's suite of services to simplify your academic life.

© 2023 Interfolio, Inc. | [Support](#) | [Careers](#) | [Accessibility Policy](#) | [Cookie Policy](#) | [Privacy Policy](#) | [Terms of Service](#)

### 4 Choose "Case Western Reserve University"

**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.

case

- Case Western Reserve University**
- Case Western Reserve University-College of Arts and Sciences

[Sign In](#)

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

[Sign Up](#)

Don't have an account? Sign up now. Use Interfolio's suite of services to simplify your academic life.

© 2023 Interfolio, Inc. | [Support](#) | [Careers](#) | [Accessibility Policy](#) | [Cookie Policy](#) | [Privacy Policy](#)

## 5 Click "Sign In"

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  
Use Interfolio  
life.

**Sign Up**



© 2023 Interfolio, Inc. | [Support](#) | [Careers](#) | [Accessibility Policy](#) | [Cookie Policy](#) | [Privacy](#)

## 6 Click the "Cases" tab along the left side.

- Home
- Faculty Search
- Positions
- Administration
- Reports
- Users & Groups
- Review, Promotion and Tenure
  - Cases**
  - Templates
  - Administration
  - Reports
  - Groups

## Cases

Search cases

3 of 3 cases

Filtered By: [Active Cases](#) [Closed Cases](#) [Reset Filters](#)

Name	Type	Template Name
<input type="checkbox"/> <b>Spartie Spartan</b> Anatomy	Promotion	FA Uploads -Fi Promotion

Step 1 of 10: Faculty Affairs Office Review ⚠ Required Documents

7 Click "CREATE CASE" in the top right corner.

ERVE

Mary Elizabeth Spohn ▾

ty >

CREATE CASE



Filter



Closed Cases



Reset Filters

Type ▾

Template Name ▾

Status ▾

8 Click "add SELECT CANDIDATES"

Home

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Groups

Create Cases

1

2

3

Select Candid...

Select Te...

Review & Se...

## Candidate Information

### Selected Candidates

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



SELECT CANDIDATES

CONTINUE

CANCEL

9

Search for and select the candidate. **Please note: If the candidate cannot be found, a user profile will need to be created first.**

Home

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Groups

### Select Candidates for Case Creation

spartie

1-1 of 1 Results

<input type="checkbox"/>	Name ↑	Unit
<input checked="" type="checkbox"/>	Spartie Spartan spartiespartan@interfolio.com	Pathology

ADD CANDIDATES CANCEL

CONTINUE CANCEL

10

Click "ADD CANDIDATES"

Home

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Groups

### Select Candidates for Case Creation

spartie

1-1 of 1 Results

<input checked="" type="checkbox"/>	Name ↑	Unit
<input checked="" type="checkbox"/>	Spartie Spartan spartiespartan@interfolio.com	Pathology

ADD CANDIDATES CANCEL

CONTINUE CANCEL

## 11 Click "CONTINUE"

Home

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

1 candidates selected for case creation.

Groups

### Candidate Information

Selected Candidates

1-1 of 1 Results

Candidate ↑

SS Spartie Spartan  
spartiespartan@interfolio.com

+ SELECT CANDIDATES

CONTINUE CANCEL

## 12 Click the "Unit for Case(s)" field.

× CASE WESTERN RESERVE UNIVERSITY

Home

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

### 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.

13 Choose your department.

The screenshot shows a web interface with a sidebar on the left containing navigation links: Home, Faculty Search, Positions, Administration, Reports, Users & Groups, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Groups. The main content area is titled "Select Case Settings". It features a form with a required field "Unit for Case(s) \*" with a red asterisk. Below the field is the instruction "Cases can only be created in one unit." The dropdown menu is open, displaying a list of departments: Nutrition, Pathology (highlighted with an orange circle), Global Health, Pharmacology, Physiology, Population and Quantitative Health Sciences, Research Administration, and School of Medicine - MetroHealth Medical Center. A search bar is visible at the bottom of the form.

14 Click the "Type" field.

The screenshot shows the same web interface as in step 13. The "Unit for Case(s) \*" dropdown menu is now closed, and "Pathology" is entered in the text box. Below it, the "Type" dropdown menu is highlighted with an orange circle. The "Type" field currently shows "--". Below the form is a section titled "Select Template" with the instruction "Templates are based on the unit and case type chosen in the case settings." This section includes a search bar with the placeholder text "Search" and a magnifying glass icon, and a pagination indicator "1-20 of 20 Templates".

15 Choose the template type.

The screenshot shows the Case Western Reserve University system interface. On the left is a navigation menu with categories: Home, Faculty Search, Positions, Administration, Reports, Users & Groups, and a sub-section for 'Review, Promotion and Tenure' containing Cases, Templates, Administration, and Reports. The 'Cases' item is selected. The main content area shows a dropdown menu with the following options: Appointment (highlighted with an orange circle), Promotion, Reappointment, Review, and Sabbatical. Below the dropdown is a 'Select Template' section with the text: 'Templates are based on the unit and case type chosen in the case settings.'

16 Choose the template. **Please note: You should only use those labeled "SCHOOL OF MEDICINE". Those labeled "Case Western Reserve University" will not route to Faculty Affairs.**

The screenshot shows the 'Template Information' section of the system. The left navigation menu is the same as in the previous screenshot, with 'Cases' selected. The main content area displays a list of templates, each with a radio button and a description:

- Custom Case**  
Create a unique case by customizing forms and workflow steps rather than using a
- Recommendation for Faculty Appointment**  
Recommendation for appointment to instructor, senior instructor, assistant professor, associate professor, and professor.
- Recommendation for Appointment to Endowed Professorship**  
Recommendation for an endowed professorship appointment
- Full Time Senior Level Appointment**  
Appointment template to facilitate appointment to Associate Professor or Professor time faculty.
- Secondary Faculty Appointment**  
Request for secondary appointment within the School of Medicine (Basic Sciences, CCLCM, Metro).
- Part Time Junior Level Appointment**  
Part-Time (Adjunct/Clinical) Junior Level Initial (New) Appointment
- Part Time Senior Level Appointment**  
Part-Time (Adjunct/Clinical) Senior Level Initial (New) Appointment

## 17 Click "CONTINUE"

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

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Groups

time faculty.

- Secondary Faculty Appointment**  
Request for secondary appointment within the School of Medicine (Basic Sciences, CCLCM, Metro).
- Part Time Junior Level Appointment**  
Part-Time (Adjunct/Clinical) Junior Level Initial (New) Appointment
- Part Time Senior Level Appointment**  
Part-Time (Adjunct/Clinical) Senior Level Initial (New) Appointment
- Emeritus Faculty Appointment**  
Request for Emeritus Appointment
- Full Time Junior Level Appointment**  
Appointment template to facilitate appointment to Assistant Professor, Senior Instructor for full time faculty.

CONTINUE

PREVIOUS

CANCEL

## 18 Click the calendar to add a deadline for the candidate to submit materials. Deadlines are not required but encouraged.

UNIVERSITY

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

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Groups

Pathology

Appointment

Template \*

Full Time Senior Level Appointment

Candidate Requirements

Soft Deadline

Candidate Requirements

1 Section

EDIT CANDIDATE SECTIONS

Internal Case Sections

Department Documents, Faculty Affairs, External Evaluations, Teaching/Service Evaluations, Research Review, Dean's Recommendation, University-Level Review

19

Choose if the candidate will be involved in the case (submitting materials themselves). **If "no" is chosen, the department must submit the candidate's materials in the case.**

Choose if you would like to notify the candidate. Yes, will send a message to the candidate and allow them to start submitting materials. Choose no if you are submitting materials on behalf of the candidate.

Click "CREATE 1 CASE"

The screenshot shows a web application interface. On the left is a sidebar with navigation links: Home, Faculty Search, Positions, Administration, Reports, Users & Groups, Review, Promotion and Tenure, Cases (highlighted with a blue bar), Templates, Administration, Reports, and Groups. The main content area is titled 'Settings' and contains two questions with radio button options:

- 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 instruction  
 Yes  
 No

At the bottom of the settings area, there are three buttons: 'CREATE 1 CASE' (highlighted with a red circle), 'PREVIOUS', and 'CANCEL'.