

How to submit materials on behalf of a candidate in Interfolio

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

2 Click "Cases"

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

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Groups

Cases

Search cases

4 of 4 cases

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

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

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

3 Find and select the case.

Home

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Groups

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

<input type="checkbox"/>	Spartie Spartan Anatomy	Promotion	Full Time Senior Promotion
--------------------------	--	-----------	-------------------------------

Case is with candidate

<input type="checkbox"/>	Spartie Spartan Pathology	Appointment	Full Time Senior
--------------------------	--	-------------	------------------

Case Created: Waiting for an administrator to notify candidate

<input type="checkbox"/>	Spartie Spartan Biochemistry	Promotion	Full Time Senior Promotion
--------------------------	---	-----------	-------------------------------

Step 9 of 13: Provost Administrative Review

4 Scroll all the way down and click "Candidate Documents".

Home

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Groups

CASE WESTERN RESERVE UNIVERSITY

Mary Elizabeth

Expand All Collapse All Download Share Settings

University-Level Review Edit

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. They will be able to replace or delete any files in an unlocked section before they submit.

[Candidate Documents](#) Unlocked

5 Click "Add File" to upload a document.

CASE WESTERN RESERVE UNIVERSITY

Mary Elizabeth Spohn

Expand All Collapse All Download Share Settings Move

Candidate Documents Unlocked Lock

Curriculum Vitae (REQUIRED for all candidates) optional Add File

No files have been submitted.

Reprints (up to 5 max) up to 5 optional Add File

No files have been submitted.

Professional Self-Description (REQUIRED for all candidates) optional Add File

No files have been submitted.

6 Click "Browse To Upload"

Add New File Previous Reviews

Upload Video Webpage

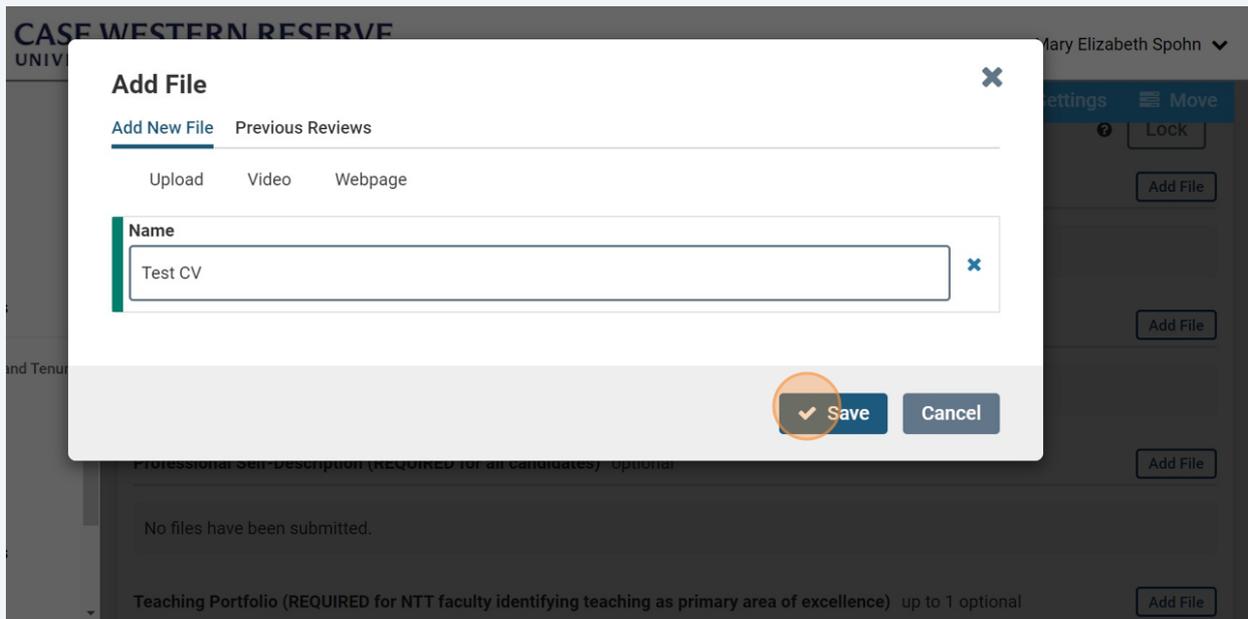
Drag & Drop your files anywhere or

Browse To Upload

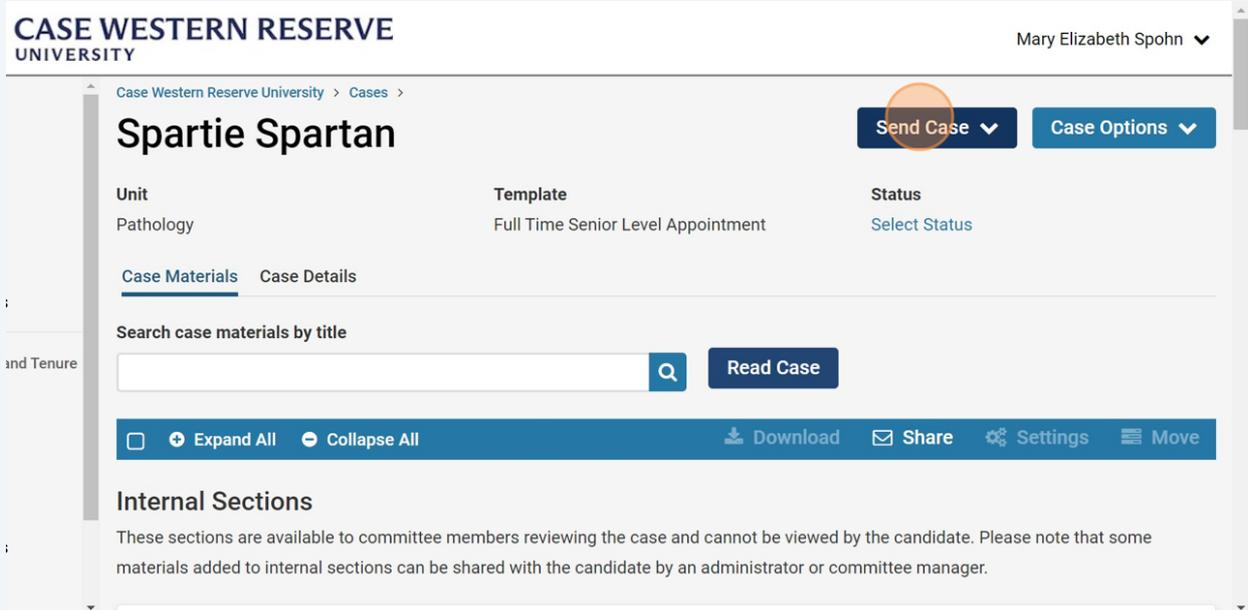
Save Cancel

Teaching Portfolio (REQUIRED for NTT faculty identifying teaching as primary area of excellence) up to 1 optional

7 Click "Save". Continue uploading all documents.



8 Once finished uploading all of the documents, click "Send Case".



9

Click "Department Review". This will send the case forward to the Department Review step where you will upload the department's required documents.

The screenshot shows the ERVE system interface. At the top right, the user name "Mary Elizabeth Spohn" is displayed. Below the header, there is a breadcrumb "y > Cases >". The main content area shows a case titled "irtan" with a "Send Case" button and a "Case Options" button. A dropdown menu is open from the "Send Case" button, showing options: "Candidate", "Notify Candidate", "Forward to Department Review" (highlighted with an orange circle), and "Department Review". Below the dropdown, there is a "Template" section with "Full Time Senior Level A" and a "Read Case" button. At the bottom, there is a navigation bar with "Collapse All", "Download", "Share", "Settings", and "Move" options.

10

Uncheck "Send a message to the reviewers gaining access." Department Administrators and Department Chairs will have access.

The screenshot shows the ERVE system interface. On the left, there is a sidebar menu with options: "Home", "Faculty Search", "Positions", "Administration", "Reports", "Users & Groups", "Review, Promotion and Tenure", "Cases", "Templates", "Administration", "Reports", and "Groups". The main content area shows a confirmation message: "Great job! You're sending the case forward to the next step, Department Review. The following reviewers will gain access to the case:". Below this, there are two sections: "Case is Being Created | 0 members" and "Department Chair and Admin | 0 members". A checkbox labeled "Send a message to the reviewers gaining access." is checked (highlighted with an orange circle). Below the checkbox, there is a text input field for "Subject *" with the placeholder "Message Subject". At the bottom, there is a "Preview" button.

11 Click "Continue".

ne case forward to the next step, Department Review. The following reviewers will lose

embers

ll gain access to the case:

in | 0 members

reviewers gaining access.

this message, their response will come directly to your email inbox.

Continue

Cancel

Case Options

Settings Move

ote that some materials