

Interfolio Job Aid for Department Admins

Interfolio Step 1: Initial Department Administrative Review

Once the promotion candidate uploads and submits all necessary documents, the case will move to the Initial Department Administrative Review step. The Chair and Admin will be notified that a task is ready to view.

Upon logging into Interfolio, click the Case Western Reserve University logo and then click the case you would like to open.

My Tasks 1

1 Unread Tasks 0 Read Tasks

Title	Due Date
Spartie Spartan Full Time Non-Tenure Track Promotion Pharmacology Promotion	Jan 28, 2023

Next, click “Case Details” to read the instructions.

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

Unit
Pharmacology

Template
Full Time Non-Tenure Track Promotion

Status
[Select Status](#)

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

Reviewing as
Department Chair and Admin

▼ **Instructions**

Please review the materials submitted by the candidate and either:

- 1) Unlock the case for the candidate to upload more information or make revisions.

OR

- 2) Send the case forward to dCAPT for review.

Please note, no documents are required to be submitted at this step.

To view the documents submitted by the candidate, select “Case Materials” then either scroll down and click on each document individually or click the “Read Case” button.

Case Materials Case Details

Search case materials by title

Read Case

Expand All Collapse All Download Share Settings Move

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. The candidate will be able to replace or delete any files in an unlocked section before they submit.

Candidate Documents Locked

Unlock

Curriculum Vitae 1 required Add File

Title	Details	Actions
<input type="checkbox"/> Test CV	Submitted by Spartie Spartan	Edit

TIP: To download the packet’s documents, click “Read Case” and a download button should appear near the search bar in the right corner.

Once you have reviewed the documents and determined there are no errors, move the case forward to the next step (dCAPT Review).

Case Western Reserve University > Cases > Spartie Spartan

Send Case Case Options

Forward to Department Committee on Appointments, Promotions, and Tenure (DCAPT)

Unit: Pharmacology Template: Full Time Non-Tenure T

Case Materials Case Details

Search case materials by title

Read Case

Expand All Collapse All Download Share Settings Move

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. The candidate will be able to replace or delete any files in an unlocked section before they submit.

Please Note: You will have the option to send a message to all users gaining access (dCAPT members) when moving the case forward.

Interfolio Step 2: Department Committee on Appointments, Promotions, and Tenure (DCAPT)

At this step, only the Department Administrator can upload documents. The blue dot next “Case Details” means that there is a required document at this step. Click “Case Details” to read the Instructions and submit the required document.

Case Western Reserve University > Cases >

Spartie Spartan

Send Case ▾ Case Options ▾

Unit: Pharmacology Template: Full Time Non-Tenure Track Promotion Status: Select Status

Case Materials Case Details **1** ←

Search case materials by title

+ Expand All - Collapse All Download Share Settings Move

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. The candidate will be able to replace or delete any files in an unlocked section before they submit.

Click “Add” to upload the file. Please Note: You cannot move to the next step without uploading all required documents.

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.

DCAPT Vote Memo ←

The written report must reflect the committee’s discussion, pros and cons, and include a numerical vote on the nomination(s). If the vote is not unanimous, the report should explain the basis for the divide. Committee reports which are cursory or summary in nature will be reviewed and returned by the Faculty Affairs office for a more complete and detailed review. The report must be signed by the committee chair, must include the date of the committee meeting, and must take care to be explicit regarding each candidate’s status as either 1) on the tenure track, 2) tenured, or 3) on the non-tenure track as well as the primary area of excellence and area of additional contribution. (Teaching, Research, Service)

No files have been added to this section.

Please Note: Uploaded documents should be placed in the correct internal section. The dCAPT Vote Memo should be placed in dCAPT Review. (See Below)

Add DCAPT Vote Memo ✕

[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 *

dCAPT Review

dCAPT Review
Department Documents
Promotion Guidelines
External Evaluations
SOM CAPT Review
Provost Review

➔
+ Add
Cancel

Once the vote memo has been added, send the case forward to the next step.

TIP: If an error was made at the previous step, you have the option to send the case backwards to that step again.

Case Western Reserve University > Cases >

Spartie Spartan

Send Case ▼
Case Options ▼

Unit

Pharmacology

Template

Full Time Non-Tenure T

Case Materials

Case Details

Reviewing as

Departmental Committee Review

Instructions

Dear dCAPT members,

The admin has reviewed all documents below. Here are the materials for review at the next committee meeting. After this has been voted on, the admin will record and submit the official recommendation of the committee to the department chair.

The department administrator should submit the department CAPT report in the required documents section before moving the case to the next step.

Interfolio Step 3: Final Department Administrative Review

At this step, only the Department Chair and Admin have access to upload documents and move the case forward. Just like the other steps, click “Case Details to view instructions and upload the required documents.

Unlike the other steps, this step has optional documents. The instructions detail that a letter of recommendation from the Division Chief or Secondary Department Chair is optional to add. To add these documents, click “Case Materials” and scroll past the candidate documents to see the “Internal Sections”. Use the dropdown arrow next to “Department Documents” and then click “Add File”.

Please Note: All documents (required and optional) uploaded at this step should be in “Department Documents”.

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 committee manager.

You are asked to submit required items as part of this case. [View](#)

dCAPT Review [Edit](#) [Add File](#)

Department Documents [Edit](#) [Add File](#)

Please add the following documents:

- Chair's nomination letter
- Summary of Teaching Evaluations

Once all documents have been uploaded, move the case forward to the Faculty Affairs office. **This will be a submitted application!**

Case Western Reserve University > Cases >

Spartie Spartan

Unit: Pharmacology | Template: Full Time Non-Tenure Track

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

Reviewing as: Department Chair and Admin

Instructions

Please submit the following documents:

- Chair's nomination letter
- Summary of Teaching Evaluations
- External Referee Spreadsheet ([Please use this required template](#))

If you need to make any changes after submitting, please email the Faculty Affairs Office at facaffrs@case.edu