

How to Submit Department Documents via Interfolio

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

2 Click "Cases"

The screenshot shows the Interfolio interface. On the left is a sidebar menu with the following items: Home, Faculty Search, Positions, Administration, Reports, Users & Groups, Review, Promotion and Tenure (highlighted), Cases (circled in orange), Templates, Administration, Reports, and Groups. The main content area is titled '4 of 4 cases' and includes filter buttons for 'Active Cases' and 'Closed Cases', along with a 'Reset Filters' link. Below the filters is a table with columns for Name, Type, and Template Name. The table contains three rows of case data, each with a checkbox and a 'Step 1 of 10: Faculty Affairs Office Review' warning icon. The first row is for 'Spartie Spartan' (Anatomy) with a 'Promotion' type and 'FA Uploads -Fi Promotion' template. The second row is for 'Spartie Spartan' (Anatomy) with a 'Promotion' type and 'Full Time Seni Promotion' template. The third row is for 'Spartie Spartan' (Pathology) with an 'Appointment' type and 'Full Time Seni' template. A note 'Case is with candidate' is visible between the second and third rows.

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		
<input type="checkbox"/> Spartie Spartan Anatomy	Promotion	Full Time Seni Promotion
Case is with candidate		
<input type="checkbox"/> Spartie Spartan Pathology	Appointment	Full Time Seni

3 Select the case.

Home

Faculty Search

Positions

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Groups

Spartie Spartan Promotion Full Time Senior
Anatomy Promotion

Case is with candidate

Spartie Spartan Appointment Full Time Senior
Pathology Promotion

Step 1 of 10: Department Review

Spartie Spartan Promotion Full Time Senior
Biochemistry Promotion

Step 9 of 13: Provost Administrative Review

4 Find the "Department Documents" Internal section and add the required files.

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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.

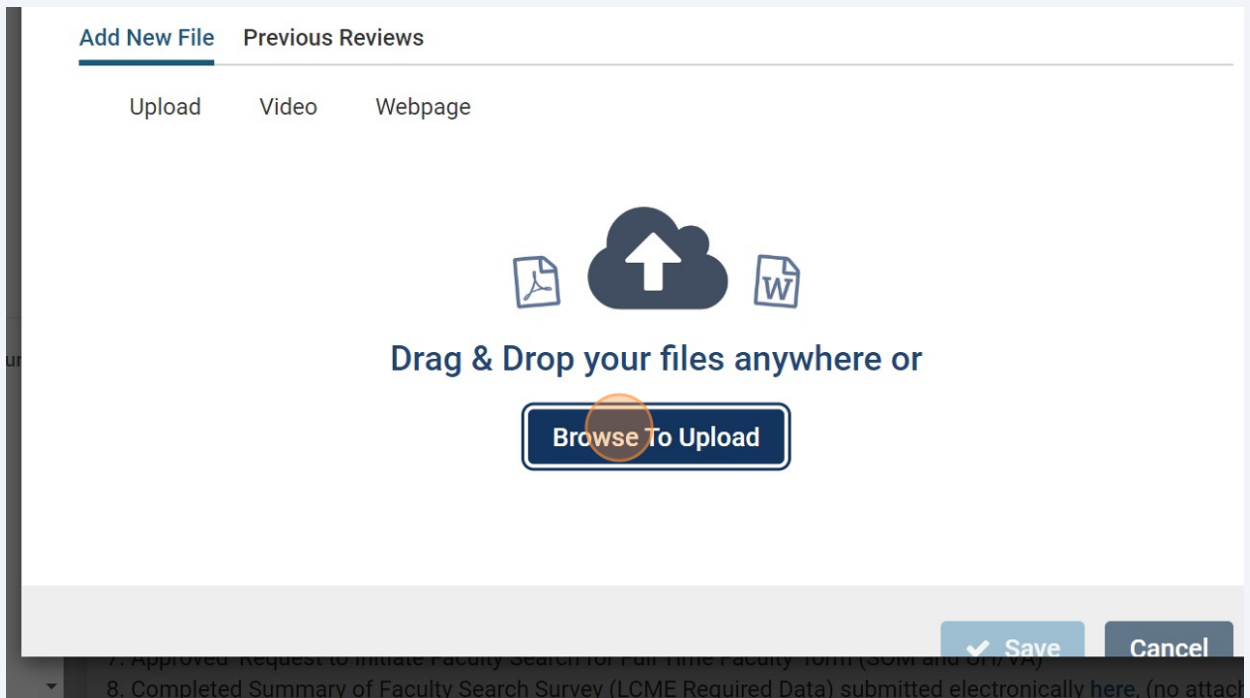
▼ Department Documents Edit Add File

For the Department to complete:

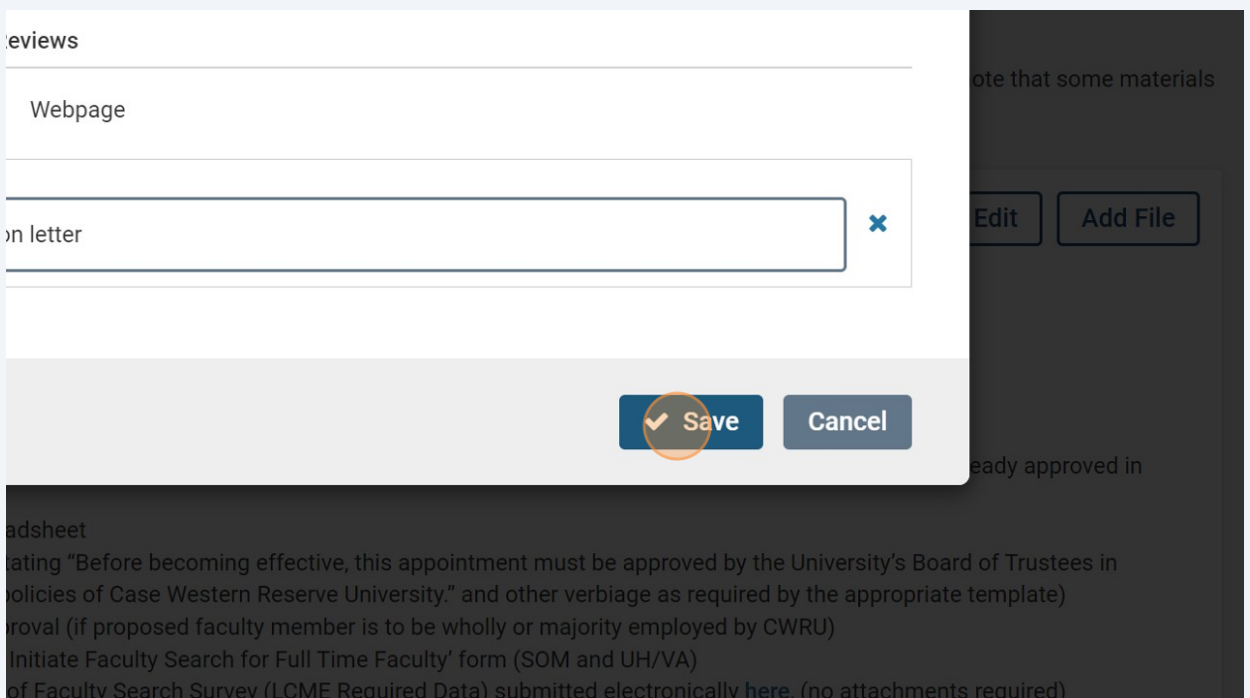
Please upload the following **required** documents:

1. Chair's nomination letter
2. dCAPT Vote Memo
3. Explanation of financial resource support (Request for Approval of Faculty Appointment/Salary form) if salary not already approved in vetting of offer letter
4. External Referee Spreadsheet
5. Copy of offer letter (stating "Before becoming effective, this appointment must be approved by the University's Board of Trustees in accordance with the policies of Case Western Reserve University," and other verbiage as required by the appropriate template)
6. Affirmative action approval (if proposed faculty member is to be wholly or majority employed by CWRU)
7. Approved 'Request to Initiate Faculty Search for Full Time Faculty' form (SOM and UH/VA)
8. Completed Summary of Faculty Search Survey (LCME Required Data) submitted electronically [here](#), (no attachments required)

5 Click "Browse To Upload"



6 Click "Save"



7

With new appointments, there is an additional form that is required. To fill out the form, click "Case Details".

If you are not submitting a case with a required form (indicated on case details page), please jump to step 17.

Pathology Full Time Senior Level Appointment

Home
Faculty Search
Positions
Administration
Reports
Users & Groups

Review, Promotion and Tenure

Cases
Templates
Administration
Reports

Case Materials **Case Details**

Search case materials by title

Read Case

Expand All Collapse All Download

Internal Sections

These sections are available to committee members reviewing the case and cannot be v materials added to internal sections can be shared with the candidate by an administratc

Department Documents

8

Add yourself as a committee manager to fill out the form. Start by clicking "Edit"

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Required Items

All required items must be completed before the case can advance to the next step. 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.

Form Name	Assignee	Actions
Full Time Senior level Appointment 9 required questions	No Assignee	Manage Respondents

Committee Members (0)

Name	Email	Role
------	-------	------

Conversation (0) Turn Off Comments

No Comments Yet

Add Comment

Edit Committee Membership

Email ? **Edit**

9 Click "Add Member"

Required Items

All required items must be completed before the case can advance to the next step. 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.

	Assignee	Actions
Senior level Appointment questions	No Assignee	Manage Respondents

Email	Role
-------	------

Conversation (0) [Turn Off Comments](#)

No Comments Yet

10 Type your name.

11 Find and select your user.

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All required items must be completed before the case can advance to the next step. 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.

Forms

Form Name	Assignee	Actions
Full Time Senior level Appointment 9 required questions	No Assignee	Manage Respondents

and Tenure

Sort By Name

First Name	Last Name	Email
Mary Elizabeth	Spohn	mary.spohn@case.edu

Conversation (0) [Turn Off Comments](#)

No Comments Yet

12 Click "Manager". *You must do this to fill out the required form.*

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Required Items

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Forms

Form Name	Assignee	Actions
Full Time Senior level Appointment 9 required questions	Committee Managers	Manage Respondents

[+ Add Member](#) [Done](#)

Name	Email	Role
Mary Elizabeth Spohn	mary.spohn@case.edu	<input type="checkbox"/> Manager

Conversation (0) [Turn Off Comments](#)

No Comments Yet

[Add Comment](#)

Voting Results

[Add New Votes](#)

13 Click "Done"

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Required Items

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Forms

Form Name	Assignee	Actions
Full Time Senior level Appointment 9 required questions	Committee Managers	Manage Respondents

[+ Add Member](#) [Done](#)

Name	Email	Role
Mary Elizabeth Spohn	mary.spohn@case.edu	<input checked="" type="checkbox"/> Manager

Conversation (0) [Turn Off Comments](#)

No Comments Yet

[Add Comment](#)

Voting Results

[Add New Votes](#)

14 Now click "Manage Respondents"

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UNIVERSITY

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Reviewing as

Department Chair and Admin

Required Items

All required items must be completed before the case can advance to the next step. 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.

Forms

Form Name	Assignee	Actions
Full Time Senior level Appointment 9 required questions	Committee Managers	Manage Respondents

Committee Members (1)

Email Edit

Name	Email	Role
Mary Elizabeth Spohn	mary.spohn@case.edu	Manager

Conversation (0) Turn Off Comments

No Comments Yet

Add Comment

15 Click "Fill Out Form"

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Status	Actions
Not Started	Fill Out Form

Status

form submissions from any Committee Member.

however a Committee

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) Turn Off Comments

16 Fill out the form and then click "Submit Form".

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[Case Western Reserve University](#) > [Cases](#) > [Spartie Spartan](#) >

Full Time Senior level Appointment

Full Name of Faculty Member: *

Proposed Rank: *

Proposed Tenure Status: *

17 Once all documents have been uploaded and the form (if applicable) is filled out, click "Send Case".

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[y](#) > [Cases](#) >

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[Send Case ▾](#) [Case Options ▾](#)

Template	Status
Full Time Senior Level Appointment	Select Status

etails **1**

nin

1 missing

Completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee can select to omit the form as a requirement for a user.

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Click "Faculty Affairs Review". *This submit the case to Faculty Affairs. Department Administrators and Department Chairs will lose access at this step.*

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Home > Cases >

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Send Case ▾

Case Options ▾

Forward to
Faculty Affairs Review

Template

Full Time Senior Level Appointment

Select Status

Details **1**

min

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1 missing

completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee can select to omit the form as a requirement for a user.