MANAGING A REVIEW OR PROMOTION CASE IN INTERFOLIO REVIEW, PROMOTION AND TENURE:
YOUR “TO DO” LIST

Presented by the Office of Faculty Affairs in the Office of the Provost at Vanderbilt University

VU.EDU/FACULTY

http://product-help.interfolio.com/m/33238 - ALL INTERFOLIO RPT HELP ARTICLES

TO DO:

☐ IMPORTANT: Has the review or promotion been initiated by the Dean’s Office? You should never start a case with a custom workflow. Your Dean’s Assistant will initiate your faculty member’s case for you in Interfolio RPT.

☐ Are your users and committees in place? Standing committees? Ad hoc committees? Do this work first.

☐ Are your case review steps correct? Once you navigate into a case, click on the light blue Case Options button and select Edit Case, and then Case Review Steps to check the current configuration of Case Review Steps. Make changes or updates, if necessary. If you need further clarification, get in touch with your Dean’s assistant or Interfolio Specialist to clarify the review steps.

☐ Are your internal case sections to your specifications?
  o If not, add Internal Case Sections by clicking the light blue Case Options button in the upper right corner and select Edit Case > Internal Case Sections (see: Interfolio Support article on creating Internal Case Sections)
  o Reorder Internal Case Sections, if needed, by clicking the light blue Case Options button in the upper right corner and select Edit Case > Internal Case Sections. Hover, drag, and drop the section where needed. You may have to refresh the page to see the new order reflected.
  o Moving individual documents will require the document to be selected first, then moved to the selected section.

☐ What are your deadlines?

☐ Are your email addresses correct for your External Letter requests? Have you read through our Best Practices for sending External Letter requests?

☐ Did you attach the appropriate review materials to the request for an external evaluation?

☐ Are you in touch with your department chair and Dean’s Office around expectations?

☐ Are your external letters labeled and organized appropriately?

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Once all materials are ready, your committees are correct and in place, your case review steps are in order, and you are ready to move it forward from your review step to the first committee review step:

1. Double check the committee composition at the next case review step
   a. If correct, send case forward to Committee 1
   b. If incorrect, make changes to Committee using Interfolio support articles on creating or editing a committee

2. Send the case forward to the committee with a message including the single sign on link: https://iam-api.interfolio.com/Shibboleth.sso/Login?entityID=https://sso-login.vanderbilt.edu
a. Subject should be: First Name Last Name Promotion Materials Ready for Your Review

3. If Committee 1 generates a document, upload it to the appropriate internal case sections

4. Repeat steps 1-3 until you have moved through all of your committees (every school is different) and are ready for the Chair’s review step
   a. Upload the chair’s memo at the appropriate internal case section

5. Download the entire dossier before the case leaves your custody (usually before the Dean’s case review step)

6. Double check the reviewers at the next case review step

7. SET YOUR RECUSALS – This is VERY important! You will recuse all department administrators, INCLUDING YOURSELF, before advancing it to the Dean’s Office.

8. Send forward with a message
   a. Subject should be: First Name Last Name Promotion Materials Ready for Your Review

QUESTIONS:
Please adhere to the protocol below when seeking an answer to your question:

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<thead>
<tr>
<th>Interfolio Product Support (amazing help articles with screenshots)</th>
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<table>
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<tr>
<th>Local Interfolio Specialists or Users</th>
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<tr>
<td>Be in touch with your school's identified Interfolio Specialist</td>
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<th>Process and Solutions Implementation Team</th>
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<td>If the tools are not performing as expected or you cannot answer your question with the first two steps</td>
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<th>Office of Faculty Affairs in the Office of the Provost</th>
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<td>Send your question via email to <a href="mailto:faculty@vanderbilt.edu">faculty@vanderbilt.edu</a></td>
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