Departmental Interfolio Case Creation Checklist

In Interfolio, you have the option to create one case at time or create multiple cases at once (if the case’s action has the same final authority).

Select the option to jump that section of the document.

Option 1: [Creating one case](#Creating_for_one_person)

Option 2 (\*recommended option\*): [Creating multiple cases at once](#Creating_for_multiple)

[Creating a case for one person based on a template](http://product-help.interfolio.com/m/33238/l/344684-create-a-case-based-on-a-template?preview=true)

* Log in to Interfolio using Single Sign-On ([review.ucsd.edu](https://review.ucsd.edu))
* Locate the “Review, Promotion and Tenure” section on the left-hand side of the screen
* Click on “Users & Groups” link to search for the person you are creating the file for
* Search for faculty name
* **Record/copy/write down the email address**
* Click on the “Cases” link under the “Review, Promotion and Tenure” section on the left-hand side of the screen to navigate to case list
* Click on the “Create Case” button
* [Select the home department or ORU for the file](http://product-help.interfolio.com/m/33238/l/344684-create-a-case-based-on-a-template?preview=true#select_a_unit_for_the_case_and_click_confirm) then click “confirm”
* [Select a template based on the file’s final authority](http://product-help.interfolio.com/m/33238/l/344684-create-a-case-based-on-a-template?preview=true#select_a_template) **\*Make sure to scroll to the bottom of the screen to select the template specific to your department (ex. ECON- Chancellor’s Authority)\***
* [Fill out the “Case Information” page](http://product-help.interfolio.com/m/33238/l/344684-create-a-case-based-on-a-template?preview=true#fill-out-the-case-information-page)
	1. Select “Review” for Type (all files need to start as this type and it can be changed once the file has been created)
	2. Search for the candidate (**Make sure to use the email address you recorded in Step 3**)
	3. “Will the candidate be involved in the evaluation?”
		1. Mark “yes” if at *any* time they will be using Interfolio to submit their documents, complete certifications, view documents, etc. \*recommended option\*
		2. Mark “no” if the candidate will NEVER be logging into the system at any point in the file. **This cannot be changed later on!**
	4. Add or delete any case data forms applicable to this file.
* [Create Candidate Requirements](http://product-help.interfolio.com/m/33238/l/344684-create-a-case-based-on-a-template?preview=true#create_candidate_requirements)
1. Candidate’s Packet Due: Add a due date for the candidate’s packet materials to be turned in (if preferred). This date is a hard deadline and will lock out the candidate if they do not access the system in time. The date can be updated if needed.
2. Instructions To Candidate: Copy and paste your call letter and/or other instructions to the candidate in this section
3. Packet Requirements: Can add or delete documents for the file here and can add a due date here
	1. Can delete the Certifications if they are not required for an appointment file
4. Uncheck the “Allow candidates to add their own sections to the packet” option at the bottom of the screen
* [Internal Case Sections](http://product-help.interfolio.com/m/33238/l/344684-create-a-case-based-on-a-template?preview=true#add-internal-case-sections)
1. Make sure the setting is checked for “Above the candidate packet” and click save.
2. Only edit the other sections if you need to add section headers for extra documents for this specific file
3. External Evaluations: Leave this section here if external referee letters are required for this file (even if you do not use Interfolio to solicit them)
* [Case Review Steps](http://product-help.interfolio.com/m/33238/l/344684-create-a-case-based-on-a-template?preview=true#set_up_the_workflow_of_case_review_steps)
1. Review the workflow and make sure to add any additional steps, if needed, for this specific file
2. Review the Departmental steps in order to recuse or add any users, add any ad hoc committees, or voting groups.
* Click “continue”
* File is created!
* Click on “return to case” button to return to the file
* [Notify candidate](http://product-help.interfolio.com/m/33238/l/344703-notify-a-candidate-of-their-review)
1. If using Interfolio, click the “Send Case” button to see the “notify candidate” option. Include a personal message to let the faculty know to access the system at review.ucsd.edu. *You must complete this step if the candidate will be logging into the system at any point in the file.*
* [Send file forward](http://product-help.interfolio.com/m/33238/l/344705-move-a-case-forward-or-backward?preview=true) to put the file in “file prep” stage
* Upload file documents
* [Request External Evaluations](http://product-help.interfolio.com/m/33238/l/344722-request-external-evaluations) via Interfolio (if applicable)
* Add redacted bundle of external evaluations to file and share them with the candidate (if applicable)
* Have candidate complete Certification 1-A
* Review candidate’s response to Cert 1-A (if any)
* (if applicable) Upload Department Ad Hoc report - unredacted and redacted under “Recommendations” section
* (if applicable) Share the redacted Department Ad Hoc report with the candidate
* (if applicable) Have candidate complete Certification 1-B (only if Ad Hoc Report is added to file)
* (if applicable) Review candidate’s response to Cert 1-B (if any)
* [Send file forward](http://product-help.interfolio.com/m/33238/l/344705-move-a-case-forward-or-backward?preview=true) for the Department Chair and/or voting faculty to review
* Review file and conduct vote (if applicable) per normal Department procedures
* Upload final Department Recommendation Letter under “Recommendations” section
* Share the Department Recommendation Letter with the candidate
* Have candidate complete Certification 2
* Review candidate’s response to Cert 2 (if any)
* Create the summary form and employment history via the link in Interfolio for AP Data
* [Send file forward](http://product-help.interfolio.com/m/33238/l/344705-move-a-case-forward-or-backward?preview=true) to the Dean’s AP staff for review

[Creating Cases for Multiple Candidates at Once](http://product-help.interfolio.com/m/33238/l/745716-create-cases-for-multiple-candidates-at-once)

\*Note this option can be used even if you are only creating a case for one person, and is recommended in order to avoid any issues with using the incorrect email address during case creation

* Log in to Interfolio using Single Sign-On ([review.ucsd.edu](https://a4.ucsd.edu/tritON/Authn/UserPassword))
* Locate the “Review, Promotion and Tenure” section on the left-hand side of the screen
* Click on “Users & Groups” link to search for the appointees you are creating the files for
* Search for the candidate’s names to make sure profiles have been created for them
	1. If they do not have a user profile built yet, please contact Brandy Cheshire.
* Click on the “Cases” link under the “Review, Promotion and Tenure” section on the left-hand side of the screen to navigate to case list
* Click on the “Create Case” button’s dropdown menu and select “Create multiple cases” selection
* [Select the home department or ORU for the file](http://product-help.interfolio.com/m/33238/l/745716-create-cases-for-multiple-candidates-at-once#select_the_unit_in_which_you_want_to_create_cases)s
* Select “Review” for type of case (all files need to start as this type and it can be changed once the file has been created)
* [Select a template based on the files’ final authority](http://product-help.interfolio.com/m/33238/l/745716-create-cases-for-multiple-candidates-at-once%22%20%5Cl%20%22select_the_template_for_the_cases_you_are_creating)  **[\*Make sure to scroll to the bottom of the screen to select the template specific to your department (ex. ECON- Chancellor’s Authority)\*](http://product-help.interfolio.com/m/33238/l/745716-create-cases-for-multiple-candidates-at-once%22%20%5Cl%20%22select_the_template_for_the_cases_you_are_creating)**
* [Select the candidates](http://product-help.interfolio.com/m/33238/l/745716-create-cases-for-multiple-candidates-at-once%22%20%5Cl%20%22indicate_if_the_candidates_will_submit_a_packet)
* [Indicate whether candidates will be submitting documents](http://product-help.interfolio.com/m/33238/l/745716-create-cases-for-multiple-candidates-at-once%22%20%5Cl%20%22indicate_if_the_candidates_will_submit_a_packet)
1. “Will the candidate be involved in the evaluation?”
	* Mark “yes” if at *any* time they will be using Interfolio to submit their documents, complete certifications, view documents, etc. \*recommended option\*
	* Mark “no” if the candidate will NEVER be logging into the system at any point in the file. **This cannot be changed later on!**
* [Add the candidates](http://product-help.interfolio.com/m/33238/l/745716-create-cases-for-multiple-candidates-at-once#click_add_candidates)
* Click “Continue” when all candidates have been added
* [Review and confirm the information in the cases](http://product-help.interfolio.com/m/33238/l/745716-create-cases-for-multiple-candidates-at-once#summary_confirmation)
1. Note: the due dates and notifications will apply to all candidates if added
* Click “yes” for the question “Would you like to notify the candidates now?”
* [Click the “Create cases” button to create the cases](http://product-help.interfolio.com/m/33238/l/745716-create-cases-for-multiple-candidates-at-once#click_to_create_cases)
* You will receive an email and the case list will be updated when the files are created
* You will need to edit each individual file if you need to make any changes to the workflow steps, add/recuse users, add committees, etc.
* [Notify candidate](http://product-help.interfolio.com/m/33238/l/344703-notify-a-candidate-of-their-review) (if you didn’t do this during the file creation)
1. If using Interfolio, click the “Send Case” button to see the “notify candidate” option. Include a personal message to let the faculty know to access the system at review.ucsd.edu. *You must complete this step if the candidate will be logging into the system at any point in the file.*
* [Send file forward](http://product-help.interfolio.com/m/33238/l/344705-move-a-case-forward-or-backward?preview=true) to put the file in “file prep” stage
* Upload file documents and work with candidate to get their documents added
* [Request External Evaluations](http://product-help.interfolio.com/m/33238/l/344722-request-external-evaluations) (if applicable)
* Add redacted bundle of external evaluations to file (if applicable)
* Have candidate complete Certification 1-A
* Review candidate’s response to Cert 1-A (if any)
* (if applicable) Upload Department Ad Hoc report- unredacted and redacted under “Recommendations” section
* (if applicable) Share the redacted Departmental Ad Hoc report with the candidate
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