

## Interfolio Cheat Sheet for DPACs/LPACs Chairs/School Directors, and Deans

Reviewing Candidates, Uploading Recommendation, Sharing and Moving Cases Forward to the Next Level of Review (updated 09-13-21)

1. Access Candidate's "Case" in Interfolio.
2. Review case and take notes for your recommendation. For those going for both promotion and tenure, be sure to make clear whether you are supporting tenure, promotion, both, neither, etc.
3. Upload your document to Interfolio in the "CASE DETAILS" tab. Click on "Case Details" and simply press the "ADD" button to add the document here. DO NOT upload the document to the "CASE MATERIALS" section. If the document is in the "CASE MATERIALS" section only the case cannot be forwarded to the next level.
4. Next, return to the "Case Materials" tab to "SHARE" the uploaded file with the candidate. Scroll down to "Internal Sections" to find your section (DPAC; Chair; Dean) and click on the arrow to open your section. Then, scroll down past the instructions and you will see the uploaded document. **Important:** Be sure the document has completely uploaded before you select it to share it. You will notice the file name will be highlighted in blue if successfully uploaded. To SHARE simply click the box next to the document you want to share (a check mark will appear in the box), then click "SHARE" as an option on the blue bar at top of your screen and select "With Candidate." **If you do not use the "SHARE" function the document will not be visible to the candidate.** It's also a good idea to "SHARE" the recommendation with the committee as well to ensure all people are dealing with the exact same document. When SHARING the file be sure to click on the "ENABLE" box under "FILE RESPONSE" and complete the response date information to allow the candidate the opportunity to submit a respond.
5. If revisions to your recommendation are required, delete the original recommendation in Interfolio, and upload the new version in the "Case Details" section. Always be sure to "SHARE" final documents with the candidate and committee members.
6. Once the final document has been SHARED, move the case forward using the "SEND CASE" button on top of page. The "SEND CASE" will move the case to "Pending Next Level of Review." This is a holding queue for cases until they are moved to the next level. Note that you can unclick the box "Send a message to the reviewers gaining access" before sending the case forward since there are no reviewers assigned to "Pending Next Level of Review."

If you run into any issues or problems, Mary Colon and Ken Sumner can assist and resolve them.