Review, Promotion & Tenure
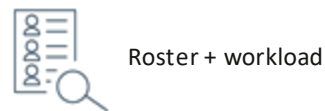## Case Manager Training

Agenda

- **Key Concepts**

- **User Roles**

- **Product Demonstration**
  - How to Create a Case
  - How to Add Committees and Committee Management
  - Notifying a Candidate
  - Review Candidate Requirements and Unlocking Sections
  - Moving a Case Forward

Addressing the Critical Moments in the Academic Lifecycle

Interfolio's Faculty Information System

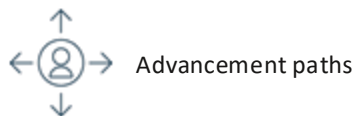| interfolio lifecycle management	interfolio faculty search	interfolio review, promotion & tenure	interfolio faculty activity reporting	interfolio data service
Roster + workload	Committee Collaboration	Workflow Efficiency	CVs	Multidisciplinary Data Pipeline
Advancement paths	Data & Compliance	Candidate Clarity	Accreditation	Disambiguation & De-duplication
Timelines	Equity & Inclusion	Fairness & Documentation	Validated Data	Accept, Edit, Amend, Reject

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Review, Promotion, and Tenure Key Concepts

Review, Promotions & Tenure
An Interfolio module used to facilitate the review process anytime a candidate submits materials and one or as series of committees need to review or approve the materials. Also referred to as RPT.

Templates
The building blocks of the RPT module that allows administrators to create standardized, repeatable processes for all review types at their institution, colleges, schools, and departments. Templates can be created centrally or copied down to specific unit for customization.

Units
A digital representation of institutional hierarchy. Within the hierarchy, the different tiers will determine scope. Administrators can be assigned to any given unit.

Ex. Institution > School > Department

Cases
The lifecycle of candidates as they progress through a standardized review cycle. Committees have the ability to add a case analysis or evaluation to the case as it progresses through the workflow leading up to the final decision.

Important Terms

Packet: The collection of materials by which a candidate is being reviewed (documents and other files). The packet is divided into sections which can be worked on and submitted independently of one another. All materials submitted in the packet will be copied to the candidates' Dossier for record keeping.

Committee: Groups of users that can review the candidates' case at a given step of the review process. Committees can be: Standing (managed from the central committee tab), Ad Hoc (case specific), or individual assignment (committee of one).

Dossier: A tool for all faculty to store and manage job, fellowship, and promotion or review documents in one place. The Dossier will act as the central archiving tool for candidates' materials. All information submitted for a review will be copied into the faculty Dossier for archiving or reusability purposes.

Review, Promotion & Tenure: User Roles
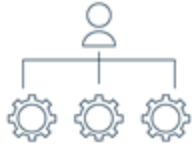
Administrators can access documents, reports, e-mail candidates and committees, and move a case forward or backward. Administrators can create and edit templates, forms, and cases for the units to which they have access.

Case Managers are assigned to a specific unit. They can review candidates, move cases forward or backward, edit the case-specific requirements and workflow steps as well as e-mail both candidates and committees from within the system.

Template Administrators can create and edit templates for the units to which they have access. They can also create and edit standing committees within their unit.

Committee Managers are assigned to a specific committee or step. They can review a candidate, move a case forward or backward, and communicate with both candidate and committee members from within the system.

Committee Members have the most basic permissions within the system. They can view a candidate's packet, download documents (if allowed), and leave comments (also if allowed) on the particular case they have access to.

Interfolio Resources

Product Help Center
Quick help articles to guide you through specific tasks and functionality while using the product
product-help.interfolio.com

Scholar Services
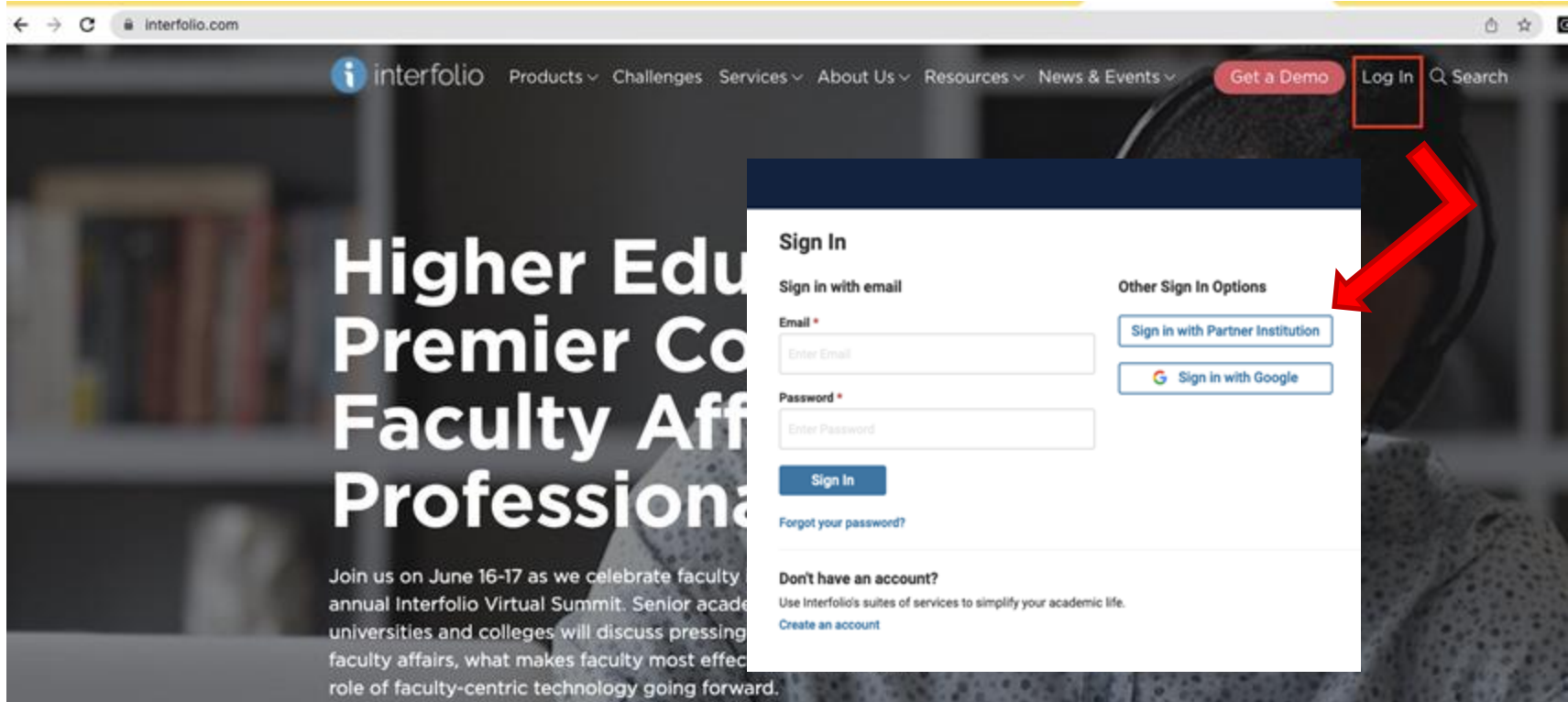Call, email, or chat with our Scholar Services team
Phone: **+1 833-844-2118**
Email: i**nterfolio-support@elsevier.com**
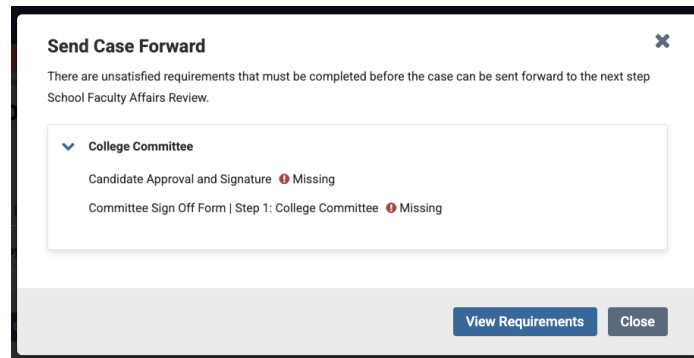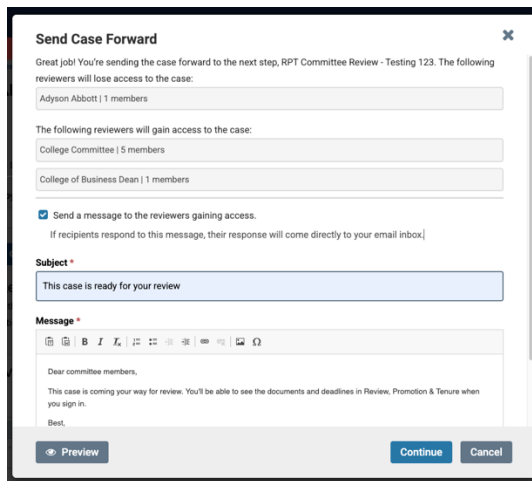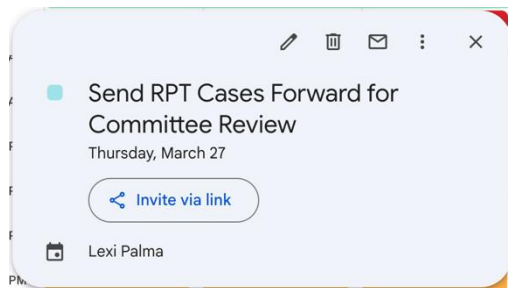
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Logging into Interfolio: interfolio.com

Case Manager Best Practices

- Google Chrome usually works best

- Set a reminder in your calendar when you need to move the case forward

Product Demo