***To sign into Interfolio:***

* Go to interfolio.com
* Click "sign in" in the top right hand corner
* Sign in through your institution by searching in the box provided "University of Louisville"
* Click "sign in"
* Input your ULink username and password and click "log in"

**Step by step directions in processing triptychs in Interfolio after signing in:**

**\*\*Please note that these directions may differ slightly if you are submitting a Periodic Career Review, Special Periodic Career Review, Advanced Rank Promotion Only, Tenure with Promotion or Tenure Only or Letter of Offer Approval.**

* Select "Cases" on the left side of screen
* Select "Create case" in the light blue box on the top right corner
* Select your department name
* When starting case use appropriate template for action listed on our website
  + Don’t use “blank case”. You will be unable to send the case forward for review
* Add candidate name and email
  + If the candidate isn’t found, add the candidates name and email to your department by adding a user in the Users & Groups tab
  + This link provides directions on how to add users: <https://product-help.interfolio.com/en_US/managing-users/add-and-manage-faculty-search-users-with-sso>
* When asked "Will the Candidate be involved in this evaluation?"
* Check the "NO" box
* Select "Continue" located under the case data forms
* Settings select "Above the candidate packet" and Continue
* Scroll to the bottom of the case review steps and select "continue"
* Click "return to case" at the top right corner
* Click "send case" Forward to "Department Faculty Affairs Coordinator"
* Add subject line stating "Name, Action and Department" you can update the email message if you so choose to.
* Select "continue"
* You will then get and email
* In the email click on the "review candidate" button
* From there you will be able to upload the required documents
* All documents need to be scanned in separately labeling them by document name
* Once the documents have been uploaded send the case forward to "Department Chair Approval"
* Your chair will then sign in to review the packet.
* If they approve then they will click the dark blue button on the top right corner that says "send case" and choose "Forward to Department Faculty Affairs Coordinator"
* You will then sign back in and forward the case to "SOM Receipt Log"

**Once you have moved it to the "SOM Receipt Log" our office will review and move forward from here.**

At any time during the approval process, you are able to check on the progress of the case approval in the following two ways:

* When viewing cases: Under the candidate's name it will note what step in the review is on (i.e. "Step 4 of 15: SOM Receipt Log")
* If you select the case, you can click on case options drop down and "view activity log"
* This will give you a log of approvals and when they've occurred

**A couple of other notes you will need to know when you are processing these actions:**

* Once the documents have been sent forward to the "SOM Receipt Log", your submission has been received, our office will then continue the approval process
* Direct questions to Toni Corbett and Beth Williams other than actions relating to Periodic Career Review, Special Periodic Career Review, Advanced Rank Promotion Only or Tenure with Promotion or Tenure Only. Questions regarding these actions should be directed to Christina Halcomb.
* Actions that require original transcripts (i.e. new appointments), please email a copy in to the School of Medicine Office of Faculty Affairs and Advancement and Kitty de Voogd, Vice Provost’s Office, Faculty Affairs, Belknap campus