

Templates and Cases

About Templates

Templates are the building blocks of the Interfolio Review, Promotion & Tenure program. They allow Administrators to create a standardized, repeatable process for all review cases in their institution, colleges, schools, and departments. Templates save details like packet requirements and steps of review for the entire faculty action process.

Template Summary

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Dossier Visibility

This template is visible to faculty at your institution who are using Interfolio's Dossier. They can view the template title, unit, instructions and packet requirements.

Disable Dossier Visibility

Preview

Template Information

Type

Promotion

Title

Demo University Promotion Cases

Description

A template for promotion cases at Demo University.

Creating a Template

1

Template Information

2

Candidate Requirements

3

Internal Case Sections

4

Case Review Steps

5

Template Summary

If your institution uses the Enterprise version of our Dossier product, you can establish guidelines when creating a template, and make those guidelines visible so that your faculty or staff can use them to prepare for future reviews.

Template Summary

Dossier Visibility

This template is visible to faculty at your institution who are using Interfolio's Dossier. They can view the template title, unit, instructions and packet requirements.

Disable Dossier Visibility

Preview

A template is created and saved at a unit level (a college, school, or department), which limits where it can be later used. For example, when a template is assigned to the institution-level unit, it will be available to the entire institution. When a template is assigned to a college-level

unit, it will be available to that college and the departments beneath it in the hierarchy. When a template is assigned to a department, it will only be available in that department.

Templates List (8)				
Search by title or unit Q Search 8 of 8 templates				
Title	Unit	Type	Dossier Visibility	
Demo University Promotion Cases A template for promotion cases at Demo University.	Demo University	Promotion	Yes	Options ▾
Dental School Annual Review This is for annual review cases in the dental school.	Demo University	Review	No	Options ▾
Dental School Annual Review Workflow Use for Dental School Review	College of Dentistry		No	Options ▾

Cases and Case Types

Once you create a template, you can use it to build individual cases without having to remember or repeat the standardized process at your institution, college, or department, however, because it is possible to modify any template to fit specific information for a candidate, you can think of a case as a customized template.

You can create multiple cases at one time, all based on a single template.

All of the components of a template can be changed or edited to fit the needs of a particular individual's review process when creating a case based on the template.

You can create 7 types of cases:

- Appointment
- Promotion
- Reappointment
- Review
- Sabbatical
- Tenure
- Other

Case Information

Return to Case

Type

Promotion

Candidate's First Name

First Name

Candidate's Last Name

Last Name

Candidate's Email

Ex.: jane.doe@university.com

Will the candidate be involved in this evaluation?

☒ Yes ☐ No

Choose "Yes" if the candidate will submit their own materials and you would like to communicate with them during the evaluation period. Note: This setting cannot be changed after this step.

Creating a Case

1 Case Information

2 Candidate Requirements

3 Internal Case Sections

4 Case Review Steps

5 Case Summary

Case Data Forms

Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the [Administration](#) page.

☐ Additional Information About Candidate	0 / 1 questions answered	Answer	X
☐ Pre-Tenure Form	0 / 1 questions answered	Answer	X

Add Case Data Form

Continue

Useful Articles for Getting Started

[Create Templates to Use as a Starting Point for New Cases](#)

[Recuse an Administrator in a Template](#)

[Create a Case Based on a Template](#)

[Set up Guidelines to Help Your Users Prepare for Upcoming Reviews](#)