Sabbatical/Leave Requests

Objective: When you need to open a case for a candidate to request a Sabbatical/Leave.

Step 1: Sign-in to Interfolio through _Gibson Online_
Note: You can also log-in directly through Interfolio - account.interfolio.com/sso.

Step 2: Proceed to the Review, Promotion and Tenure module on the left side of your home page in Interfolio and click "Cases".

Step 3: Click "Create Case" and select your correct unit/department.

Step 4: Click the template "Sabbatical and Leave Requests".
Note: Some schools may have different name variations for their Sabbatical and Leave Requests template. Check with your Dean's Office if you are unable to find the correct template.

Step 5: Begin to fill out "Case Information". You can "Search for a Candidate" by filling in their last name. This will auto populate your "Candidate's First Name, Candidate's Last Name, and Candidate's Email".
Note: If you did not find your candidate, you can enter their information manually. Be sure to use a Tulane email address for "Candidate's Email"

Step 6: Click "Save and Continue" and the next page "Candidate Requirements" will appear.

Step 7: Fill out "Candidate Requirements" section. This section includes the date the candidate's packet is due, any additional instructions, as well as packet requirements. Once complete, click "Continue".
Note: You can add more requirements if need-be.

Step 8: The "Internal Case Section" is next. This is the default. Make changes as needed, but you will probably not need to. Click "Continue".

Step 9: The "Case Review Steps" shows you the routing for your current sabbatical case. If no changes, click "Continue".

Step 10: The "Case Summary" section is the last section in creating a case. This is just a summary of Steps 5-9. Click "Return to Case" at top right.

Step 11: Click "Send Case" in top right and click "Candidate". This notifies the candidate that the case is in their queue. The candidate will then upload the documents requested.
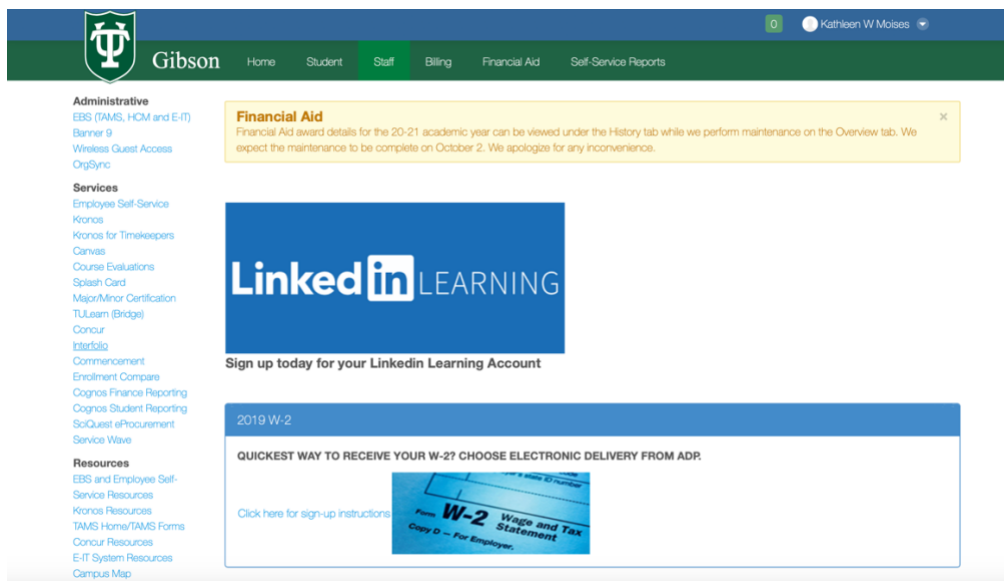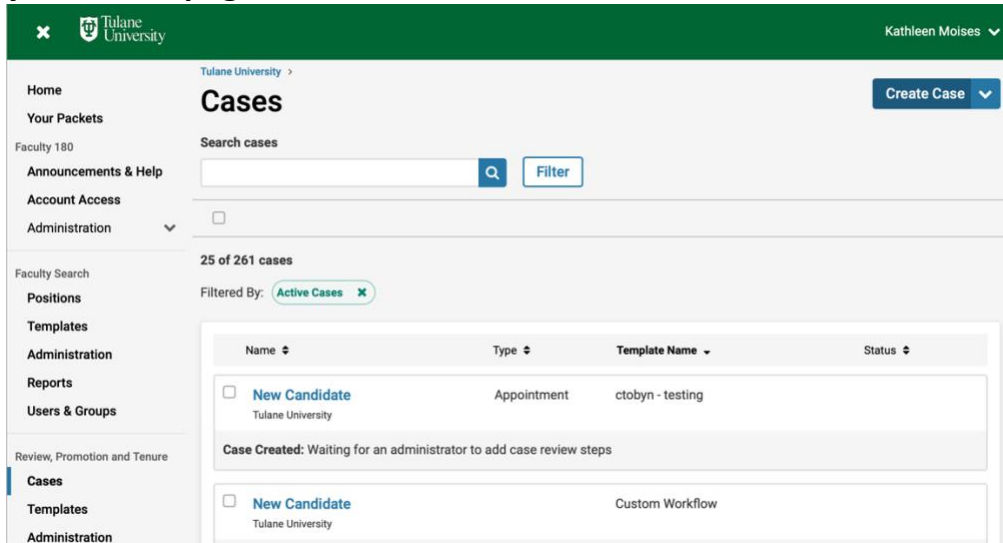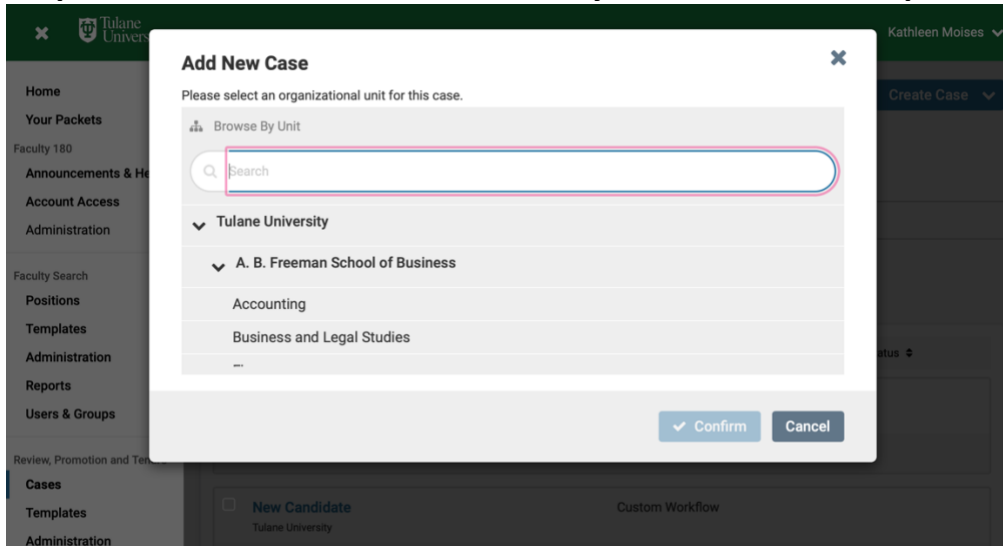

Finished

For an illustrated version of these instructions, please continue through the rest of the document.

Step 1: Sign-in to Interfolio through *Gibson Online*

Note: You can also log-in directly through Interfolio - account.interfolio.com/sso.

Step 2: Proceed to the Review, Promotion and Tenure module on the left side of your home page in Interfolio and click "Cases".

Step 3: Click "Create Case" and select your correct unit/department.

Step 4: Click the template "Sabbatical and Leave Requests".
Note: Some schools may have different name variations for their Sabbatical and Leave Requests template. Check with your Dean's Office if you are unable to find the correct template.

Step 5: Begin to fill out "Case Information". You can "Search for a Candidate" by filling in their last name. This will auto populate your "Candidate's First Name, Candidate's Last Name, and Candidate's Email".

Note: If you did not find your candidate, you can enter their information manually. Be sure to use a Tulane email address for "Candidate's Email"

Step 6: Click "Save and Continue" and the next page "Candidate Requirements" will appear.

Step 7: Fill out "Candidate Requirements" section. This section includes the date the candidate's packet is due, any additional instructions, as well as packet requirements (defaulted to request CV, Sabbatical Proposal, and Sabbatical Leave & Request Form). Once complete, click "Continue".
Note: You can add more requirements if need-be.

Step 8: The "Internal Case Section" is next. This internal section helps committee members or individual users organize the materials they add as part of the review. This is the default. Make changes as needed. Click "Continue".

Step 9: The "Case Review Steps" shows you the routing for your current sabbatical case. If no changes, click "Continue".
Note: Different schools have different routing.

Step 10: The "Case Summary" section is the last section in creating a case. This is just a summary of Steps 5-9. Click "Return to Case" at top right.

Step 11: Click "Send Case" in top right and click "Candidate". This notifies the candidate that the case is in their queue. The candidate will then upload the documents requested.