

Creating and Submitting an Emeritus/Emerita Case Initiator: Dean's Office

Step 1: Sign-in to Interfolio: account.interfolio.com/sso

Note: You can also log-in through [Gibson Online](#) by selecting "Interfolio" in the left-hand menu.

Step 2: Click "Cases" in the left-hand menu

Step 3: Click "Create a Case" in the top right corner

Step 4: Find your specific School (not department) and click "Confirm"

Step 5: Click "Appointment to Emeritus/Emerita Status"

Step 7: Make sure "Type" populates with "Appointment"

Step 8: Find under Case Data Forms the "Emeritus/Emerita Status Candidate Information" and click "Answer" highlighted in blue.

Note: This step should be completed before you "Search for a Candidate". If you "Search for a Candidate" first, you will need to repopulate after you fill out the Emeritus/Emerita Status Candidate Information form.

Step 9: Fill out the Emeritus/Emerita Status Candidate Information form on behalf of the faculty member you are submitting an emeritus case for.

Step 9a: Click "Save" to bring you back to the Case Information page.

Step 10: In the "Search for a Candidate" box type the faculty member's email. This will populate the Candidate's First, Last, and Email.

Step 11: Select “No” for the question “Will the candidate be involved in this evaluation?”

Note: This way you are able to upload all the documents without inconveniencing the candidate. If you select “Yes” you will not be able to change this in the future. You would then need to restart the case.

Step 12: Click “Save & Continue” to bring you to the next page.

Step 13: Once on the Internal Case Sections page, click “Continue” to move forward.

Step 14: Click “Continue” to move onto the Case Summary page.

Step 15: Click “Return to Case” in the right-hand corner.

Step 16: Select “Send Case” and then “Forward to Dean’s Office”

Step 16a: You can write an email letting your Dean know the case is on the way. Click “Continue” when finished.

Step 17: The case will move on to the next step which is the Dean’s Office. This step includes members of the dean’s office (you) as well as the Dean.

Note: You or the Dean can access this case by going to your home page and looking under “My Tasks”

Step 18: On the Home page under “My Tasks”, open the Emeritus/Emerita Appointment case by clicking on the Candidate’s Name.

Step 18a: Select “Case Details”

Note: This will have a number “3” next to it representing the three documents you will be required to upload.

Step 18b: Upload the candidate’s most current CV and Resignation Letter as well as the Dean’s Letter of Approval. Click “Send Case” and click “Forward to the Provost’s Office”.

Note: The case will then route to the Provost’s Office for review, who will review, then notify the Board Office.

Finished

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

1-Pager

Office of Academic Affairs & Provost



interfolio

Step 1: Sign-in to Interfolio: account.interfolio.com/sso

Note: You can also log-in through [Gibson Online](#) by selecting “Interfolio” in the left-hand menu.

The screenshot shows the Gibson Online website. The top navigation bar includes Home, Student, Staff, Billing, and Financial Aid. The left-hand menu lists various services like EBS (TAMS, HCM and E-IT), Wireless Guest Access, Kronos, Kronos for Timekeepers, Canvas, Course Evaluations, Splash Card, Major/Minor Certification, Training Wave, Concur, **Interfolio** (highlighted with a mouse cursor), Cognos Finance Reporting, Cognos Student Reporting, SoQuest eProcurement, and Service Wave. The main content area features announcements such as 'All-Campus Town Hall: Climate Survey Results + Discussion' and '2017 W-2'.

Step 2: Click “Cases” in the left-hand menu

The screenshot shows the Interfolio 'My Tasks' page. The left-hand menu has 'Cases' highlighted with a red box. The main content area shows a table of tasks with columns for Title and Due Date. The 'Cases' menu item is highlighted with a red box.

Title	Due Date
Health Policy and Management (HPM) Review SPHTM-Third-year Review	
Orthopaedics Reappointment Reappointment to Non-BOR Endowed Professorship	
Orthopaedics Reappointment Reappointment to Non-BOR Endowed Professorship	
Orthopaedics Reappointment Reappointment to Non-BOR Endowed Chair	
Orthopaedics Appointment Appointment to BOR Endowed Professorship	
Neurosurgery Appointment Appointment to BOR Endowed Chair	

Step 3: Click “Create a Case” in the top right corner

The screenshot shows the Tulane University 'Cases' page. The top navigation bar is green with the Tulane University logo on the left and the user name 'Kathleen Moises' on the right. Below the navigation bar, there is a sidebar on the left with various menu items. The main content area is titled 'Cases' and includes a search bar and a 'Filter' button. A table of cases is displayed, with the first row highlighted. The 'Create Case' button in the top right corner is highlighted with a red box.

Name	Type	Template Name	Status
<input type="checkbox"/> New Candidate Tulane University	Appointment	ctobyn - testing	
Case Created: Waiting for an administrator to add case review steps			
<input type="checkbox"/> New Candidate Tulane University		Custom Workflow	
Case Created: Waiting for an administrator to add case review steps			
<input type="checkbox"/> New Candidate Tulane University		Custom Workflow	

Step 4: Find your specific School (not department) and click “Confirm”

The screenshot shows the 'Add New Case' dialog box. The title is 'Add New Case' with a close button (X) in the top right corner. Below the title, there is a prompt: 'Please select an organizational unit for this case.' Underneath, there is a search bar with the text 'science'. A list of organizational units is displayed, with 'School of Science and Engineering' highlighted by a red box. Other units listed include 'Computer Science', 'Earth and Environmental Sciences', 'Neuroscience', and 'River Coastal Sciences and Engineering'. At the bottom of the dialog, there are two buttons: 'Confirm' and 'Cancel'.

Step 5: Click “Appointment to Emeritus/Emerita Status”

Note: The wording in the screenshot below looks a little different. For this screenshot we are using our academic affairs testing environment.

The screenshot shows the 'New Case' interface in the Tulane University system. The left sidebar contains navigation options: Home, Your Packets, Faculty 180, Announcements & Help, Account Access, Administration, Faculty Search, Positions, Templates, Administration, Reports, Users & Groups, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area displays a list of case templates. The template 'Appointment to Emeritus/Emerita Status' is highlighted with a red box. A callout box on the right explains that these templates are created by someone at the institution for use within the unit.

Template Name	Description	Action
Blank Case	A blank case that can be customized to match your requirements	
Endowed Professorship Appointment	Use this template for the Appointment of Endowed Professors	Preview
Endowed Chair Holder's Review	Endowed Chair holder renewal/reappointment reviews.	Preview
Appointment to Emeritus/Emerita Status	Please use this template to process Emeritus/Emerita requests.	Preview
University Offer Process	This template is used to process offer letters for selected candidates in the Faculty Search Module.	Preview
testing delete me	testing	Preview
Test	Test	Preview
Test Template - Sabbatical Requests	Use to Test Sabbatical Process	Preview
F180 Vita Test	Testing	Preview
Appointment to Emeritus/Emerita Status - Department	Please use this template to process Emeritus/Emerita requests.	Preview
Appointment to Emeritus/Emerita Status - Dean's Office	Please use this template to process Emeritus/Emerita requests.	Preview

Step 7: Make sure “Type” populates with “Appointment”

The screenshot shows the 'Case Information' form in the Tulane University system. The 'Type' dropdown menu is set to 'Appointment'. A red arrow points to the dropdown with the text 'This should auto-populate "Appointment"'. The form also includes a 'Candidate Information' section with a search box. A sidebar on the right shows the 'Creating a Case' process steps: 1 Case Information, 2 Candidate Requirements, 3 Internal Case Sections, 4 Case Review Steps, and 5 Case Summary.

Step 8: Find under Case Data Forms the “Emeritus/Emerita Status Candidate Information” and click “Answer” highlighted in blue.

Note: This step should be completed before you “Search for a Candidate”. If you “Search for a Candidate” first, you will need to repopulate after you fill out the Emeritus/Emerita Status Candidate Information form.


The screenshot displays the Tulane University 'New Candidate' form. At the top, there is a green header with the Tulane University logo and the name 'Kathleen Moises'. Below the header, a breadcrumb trail reads 'Tulane University > Cases > New Candidate >'. The main content area is divided into several sections:

- Case Information:** Includes a 'Type' dropdown menu currently set to 'Appointment'.
- Candidate Information:** Features a 'Search for a Candidate' search box and three input fields for 'Candidate's First Name', 'Candidate's Last Name', and 'Candidate's Email'.
- Will the candidate be involved in this evaluation?:** A section with radio buttons for 'Yes' (selected) and 'No'.
- Case Data Forms:** A section explaining that case data forms can be used to include additional information about candidates. It lists a form titled 'Emeritus/Emerita Status Candidate Information' with '0 / 13 questions answered'. A blue 'Answer' button is highlighted with a red box.

On the right side, a 'Creating a Case' sidebar shows a progress indicator with five steps: 1. Case Information (active), 2. Candidate Requirements, 3. Internal Case Sections, 4. Case Review Steps, and 5. Case Summary.

At the bottom left, there is a footer with the text '© 2021 Interfolio, Inc. Program Policies'.

Step 9: Fill out the Emeritus/Emerita Status Candidate Information form on behalf of the faculty member you are submitting an emeritus case for.

Kathleen Moises

[Home](#)
[Your Packets](#)
Faculty 180
[Announcements & Help](#)
[Account Access](#)
[Administration](#)
Faculty Search
[Positions](#)
[Templates](#)
[Administration](#)
[Reports](#)
[Users & Groups](#)
Review, Promotion and Tenure
[Cases](#)
[Templates](#)
[Administration](#)
[Reports](#)
[Users & Groups](#)

[Tulane University](#) > [Cases](#) > [New Candidate](#) >

Submit Form

Emeritus/Emerita Status Candidate Information


First Name
Candidate's First Name

Middle Initial
Candidate's Middle Initial

Last Name
Candidate's Last Name

Suffix

School


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Step 9a: Click “Save” to bring you back to the Case Information page.

Tulane University Kathleen Moises

Home

Your Packets

Faculty 180

Announcements & Help

Account Access

Administration

Faculty Search

Positions

Templates

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

Tulane Appointment Date *
Date of First Full Time Faculty Appointment at Tulane - Please Format: "MM/DD/YYYY"
07/01/2000

Retirement Date *
Please Format: "MM/DD/YYYY"
07/01/2021

Full-Time Service Years (Total) *
Totally years of full-time service across all institutions
21

Full-Time Service Years (Tulane) *
Total years of full-time service at Tulane
21

Board Approval Date
To be entered by the Office of Academic Affairs & Provost

© 2021 Interfolio, Inc. **Save** Cancel

Step 10: In the “Search for a Candidate” box type the faculty member’s email. This will populate the Candidate’s First, Last, and Email.

Administration

Faculty Search

Positions

Templates

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Candidate Information

Search for a Candidate
acouvil
Joey Couvillon
acouvil@tulane.edu

Last Name *

Candidate's Email *
Ex.: jane.doe@university

First Name Last Name

Will the candidate be involved in this evaluation?

2
3
4
5

Step 11: Select “No” for the question “Will the candidate be involved in this evaluation?”

Note: This way you are able to upload all the documents without inconveniencing the candidate. If you select “Yes” you will not be able to change this in the future. You would then need to restart the case.

Administration

Faculty Search

Positions

Templates

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

Candidate Information

Search for a Candidate

Candidate's First Name * Candidate's Last Name * Candidate's Email *

Joey Couvillon acouvil@tulane.edu

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.

2 Candidate Requirements

3 Internal Case Sections

4 Case Review Steps

5 Case Summary

Step 12: Click “Save & Continue” to bring you to the next page.

Home

Your Packets

Faculty 180

Announcements & Help

Account Access

Administration

Faculty Search

Positions

Templates

Administration

Reports

Users & Groups

Review, Promotion and Tenure

Cases

Templates

Administration

Reports

Users & Groups

Type *

Appointment

Candidate Information

Search for a Candidate

Candidate's First Name * Candidate's Last Name * Candidate's Email *

Joey Couvillon acouvil@tulane.edu

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.

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.

Emeritus/Emerita Status Candidate Information 10/ 13 questions answered [Answer](#) [X](#)

[Add Case Data Form](#)

[Save & Continue](#) [Return to Case Summary](#)

Creating a Case

1 Case Information

2 Candidate Requirements

3 Internal Case Sections

4 Case Review Steps

5 Case Summary

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Step 13: Once on the Internal Case Sections page, click “Continue” to move forward.

The screenshot shows the 'Internal Case Sections' page. At the top, there is a green header with the Tulane University logo and the name 'Kathleen'. Below the header, a breadcrumb trail reads 'Tulane University > Cases > Joey Couvillon >'. The main heading is 'Internal Case Sections'. A descriptive paragraph explains that sections are created to help committee members organize materials. Below this is a 'Settings' section with the heading 'Internal case sections will appear:' and two radio button options: 'Above the candidate packet' (unselected) and 'Below the candidate packet' (selected). The 'Sections' section displays two existing sections: 'Dean's Office Documents' and 'Provost Office Documents', each with 'Edit' and 'Remove' buttons. Below these are two buttons: 'Add Section' and 'Add External Evaluations Section'. At the bottom, there are two buttons: 'Continue' (highlighted with a red box) and 'Previous'. On the right side, a 'Creating a Case' progress indicator shows four steps: 1. Case Information, 2. Internal Case Sections (highlighted with a green circle), 3. Case Review Steps, and 4. Case Summary.

Step 14: Click “Continue” to move onto the Case Summary page.

The screenshot shows the 'Case Review Steps' page. At the top, there is a green header with the Tulane University logo and the name 'Kathleen'. Below the header, a breadcrumb trail reads 'Tulane University > Cases > Joey Couvillon >'. The main heading is 'Case Review Steps'. Below the heading are two buttons: 'Add Step' and 'Additional Options'. The main content area displays two review steps: '1 Dean's Office' and '2 Provost Office'. Each step has an 'Edit' and 'Delete' button. The 'Dean's Office' step is assigned to 'Kathleen Moises (kwhite13@tulane.edu)' and includes instructions and 3 required documents. The 'Provost Office' step is assigned to 'AA&P Staff (4)' and includes instructions and 1 required document. At the bottom, there are two buttons: 'Continue' (highlighted with a red box) and 'Previous'. On the right side, a 'Creating a Case' progress indicator shows four steps: 1. Case Information, 2. Internal Case Sections, 3. Case Review Steps (highlighted with a green circle), and 4. Case Summary.

Step 15: Click “Return to Case” in the right-hand corner.

Tulane University > Cases > Joey Couvillon >

Case Summary

Case Information [Edit](#)

Type	Name
Appointment	Joey Couvillon
Unit	Email
Academic Affairs Test Environment	acouvil@tulane.edu

Case Data Forms

Creating a Case

- 1 Case Information
- 2 Internal Case Sections
- 3 Case Review Steps

Home & Help
ess
in

Step 16: Select “Send Case” and then “Forward to Dean’s Office”

Tulane University > Cases >

Joey Couvillon

Send Case **Case Options**

Forward to Dean's Office

Template
Appointment to Emeritus/Emerita Status - [Select Status](#)
Dean's Office

Home
Your Packets
Faculty 180
Announcements & Help
Account Access
Administration

Case Materials Case Details

Step 16a: You can write an email letting your Dean know the case is on the way. Click “Continue” when finished.

Send Case Forward

Great job! You're sending the case forward to the next step, Dean's Office. The following reviewers will lose access to the case:

Case is Being Created | 0 members

The following reviewers will gain access to the case:

Kathleen Moises | 1 members

Send a message to the reviewers gaining access.
If recipients respond to this message, their response will come directly to your email inbox.

Subject *
Joey Couvillon - Emeritus Appointment

Message *

Dear _____

This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.

Best,
Kathleen Moises

body p

Continue **Cancel**

Step 17: The case will move on to the next step which is the Dean’s Office. This step includes members of the dean’s office (you) as well as the Dean.

Note: You or the Dean can access this case by going to your home page and looking under “My Tasks”

The screenshot shows the Tulane University 'My Tasks' dashboard. At the top, there is a green header with the Tulane University logo and the name 'Kathleen Moises'. Below the header, the 'My Tasks' section displays '11 Unread Tasks' and '0 Read Tasks'. A search bar is located to the right of the task counts. Below the counts is a table with the following data:

Title	Due Date
Joey Couvillon Academic Affairs Test Environment Appointment Appointment to Emeritus/Emerita Status - Department	
Health Policy and Management (HPM) Review SPHTM-Third-year Review	
Orthopaedics Reappointment Reappointment to Non-BOR Endowed Professorship	
Orthopaedics Reappointment Reappointment to Non-BOR Endowed Professorship	
Orthopaedics Reappointment Reappointment to Non-BOR Endowed Chair	
Orthopaedics Appointment Appointment to BOR Endowed Professorship	

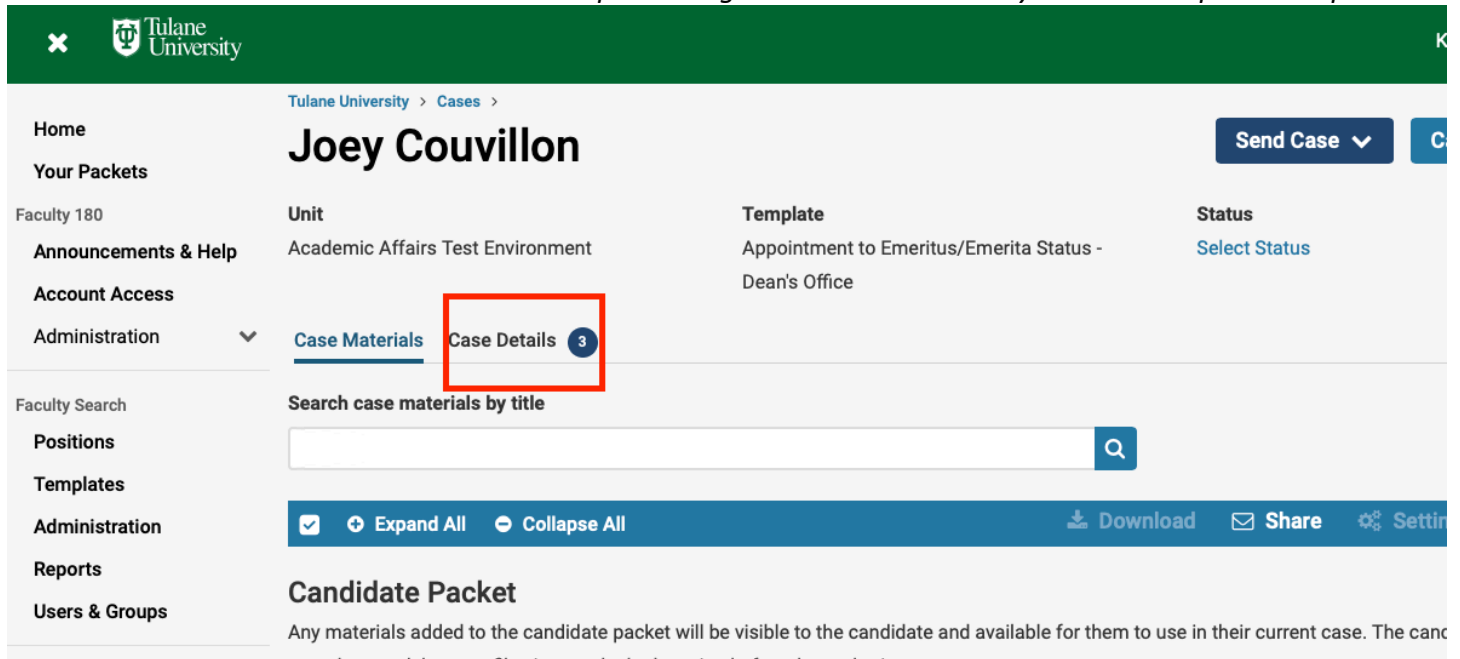
A 'View all' link is located at the bottom right of the table.

Step 18: On the Home page under “My Tasks”, open the Emeritus/Emerita Appointment case by clicking on the Candidate’s Name.

This screenshot is similar to the previous one, but the 'Joey Couvillon' candidate name in the first row of the task list is highlighted with a red rectangular box. The rest of the dashboard, including the task counts and search bar, remains the same.

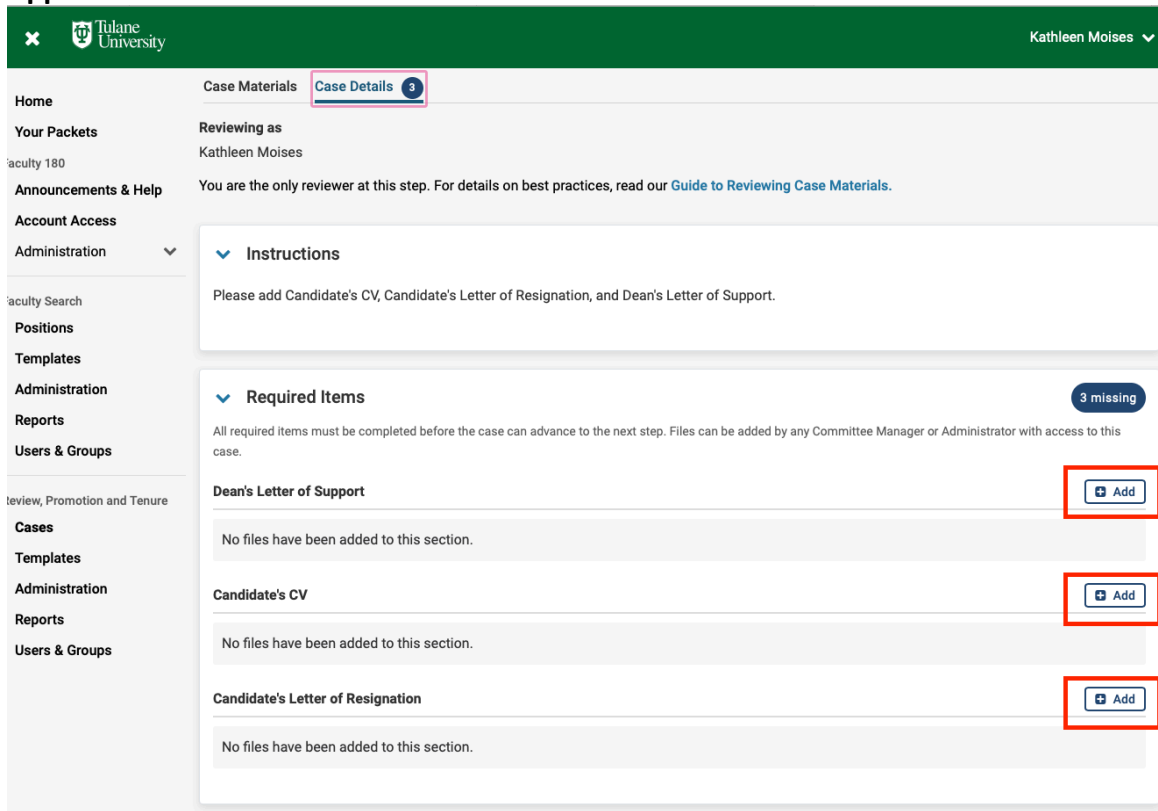
Step 18a: Select "Case Details"

Note: This will have a number "3" next to it representing the three documents you will be required to upload.



The screenshot shows the Tulane University Case Management System interface. The top navigation bar includes the Tulane University logo and a user profile for Kathleen Moises. The main header displays the case name "Joey Couvillon" and a "Send Case" button. Below the header, there are sections for "Unit" (Academic Affairs Test Environment), "Template" (Appointment to Emeritus/Emerita Status - Dean's Office), and "Status" (Select Status). A navigation menu on the left lists various system functions. The "Case Materials" tab is selected, and the "Case Details" sub-tab is highlighted with a red box, showing a notification badge with the number "3". Below the tabs is a search bar for case materials by title. A blue action bar contains options for "Expand All", "Collapse All", "Download", "Share", and "Settings". The main content area is titled "Candidate Packet" and includes a brief description of the packet's purpose.

Step 18b: Upload the candidate's most current CV and Resignation Letter as well as the Dean's Letter of Approval.



The screenshot shows the "Case Details" page in the Tulane University Case Management System. The "Case Materials" tab is selected, and the "Case Details" sub-tab is highlighted with a red box. The page is titled "Reviewing as Kathleen Moises" and includes a note: "You are the only reviewer at this step. For details on best practices, read our [Guide to Reviewing Case Materials](#)." Below this, there are two main sections: "Instructions" and "Required Items". The "Required Items" section is highlighted with a red box and shows a notification badge with the number "3 missing". It lists three items that need to be uploaded: "Dean's Letter of Support", "Candidate's CV", and "Candidate's Letter of Resignation". Each item has a corresponding "Add" button, which is also highlighted with a red box. The "Instructions" section contains the text: "Please add Candidate's CV, Candidate's Letter of Resignation, and Dean's Letter of Support."

Step 18c: Click “Send Case” and click “Forward to the Provost’s Office”.

Note: The case will then route to the Provost’s Office for review, who will review, then notify the Board Office.

The screenshot shows the Tulane University case management system interface. At the top, there is a green header with the Tulane University logo and the name 'Kathleen Moises'. Below the header, the breadcrumb trail reads 'Tulane University > Cases >'. The main content area is titled 'Joey Couvillon'. On the left, there is a navigation menu with options: 'Home', 'Your Packets', 'Faculty 180', 'Announcements & Help', 'Account Access', and 'Administration'. The main content area displays the case details for 'Joey Couvillon', including the 'Unit' (Academic Affairs Test Environment) and the 'Template' (Appointment to Emeritus/Emerita Status - Dean's Office). A red box highlights the 'Send Case' dropdown menu, which is currently open and showing the option 'Forward to Provost Office'. The 'Case Options' dropdown menu is also visible to the right of the 'Send Case' menu.

Finished