

<u>Creating and Submitting an Emeritus/Emerita Case</u> Initiator: Department Administrator or Department Chair

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

Note: You can also log-in through <u>Gibson Online</u> 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 6: Make sure "Type" populates with "Appointment"

Step 7: Scroll down to 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 8: Fill out the Emeritus/Emerita Status Candidate Information form on behalf of the faculty member you are submitting an emeritus case for.

Step 8a: Click "Save" to bring you back to the Case Information page.

Step 9: In the "Search for a Candidate" box type the faculty member's email. This will populate the Candidate's First, Last, and Email.

Step 10: 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 <u>not</u> be able to change this in the future. You would then need to restart the case.

- Step 11: Click "Save & Continue" to bring you to the next page.
- Step 12: Once on the Internal Case Sections page, click "Continue" to move forward.
- Step 13: On the Case Review Steps page we will now edit the Department section. Click "Edit".

Step 13a: Click "Add Members" and search for your department chair, department administrator (this could be yourself), and any other additional members. Select "+Add".

Step 13b: Once you have added everyone, click "Close" and then click "Return to Case Review Steps"

- 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 Department"

Step 16a: You can write an email letting your department chair and other members of the committee the case is on the way. Click "Continue" when finished.

Step 17: The case will move on to the next step which is the Department. This step includes the department administrator (which could be you) and the department chair.

Note: Anyone on the department's committee (department administrator, chair, and other designated members) 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 "2" 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. Click "Send Case" and click "Forward to the Dean's Office".

Note: The case will then route to Dean's Office for the dean's letter of approval and then to the Provost's Office, for review, who will then notify the Board Office.

Finished

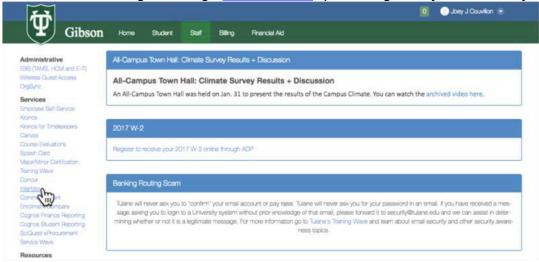
For an illustrated version of these instructions, please continue through the rest of the document.

1-Pager Office of Academic Affairs & Provost

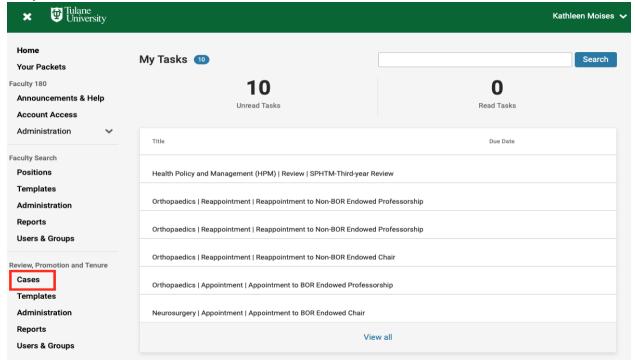


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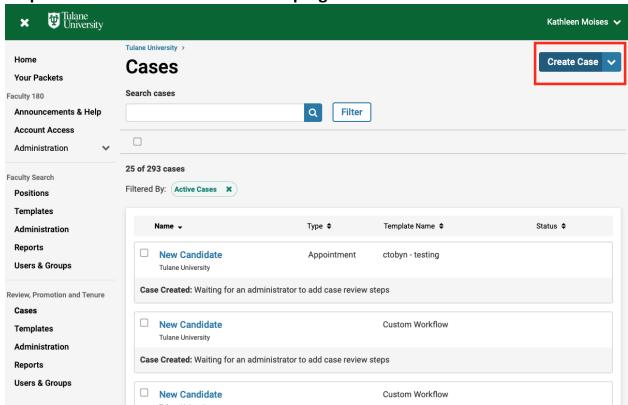
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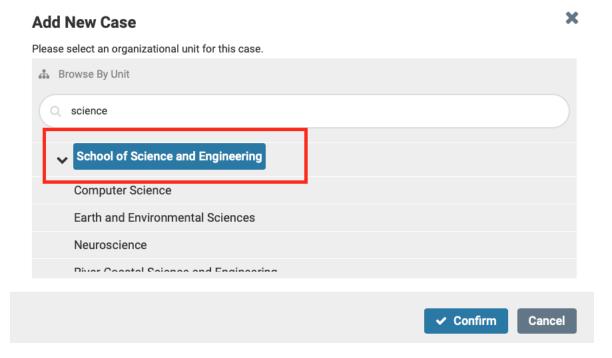
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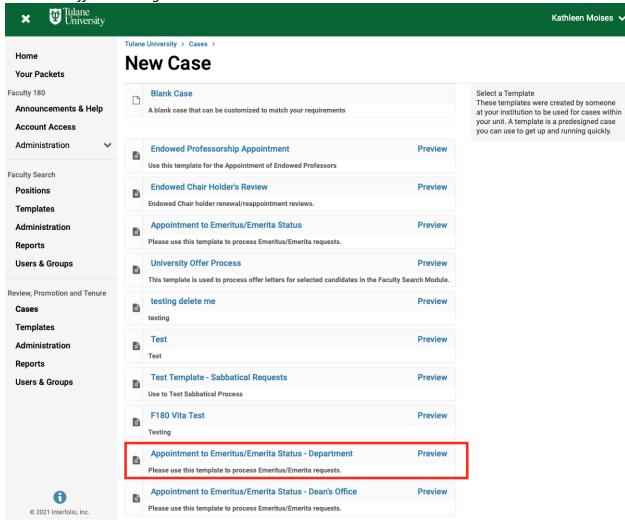


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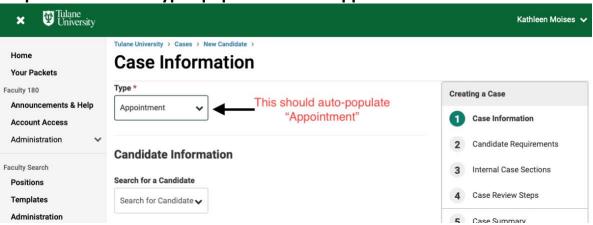


Step 5: Click "Appointment to Emeritus/Emerita Status"

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

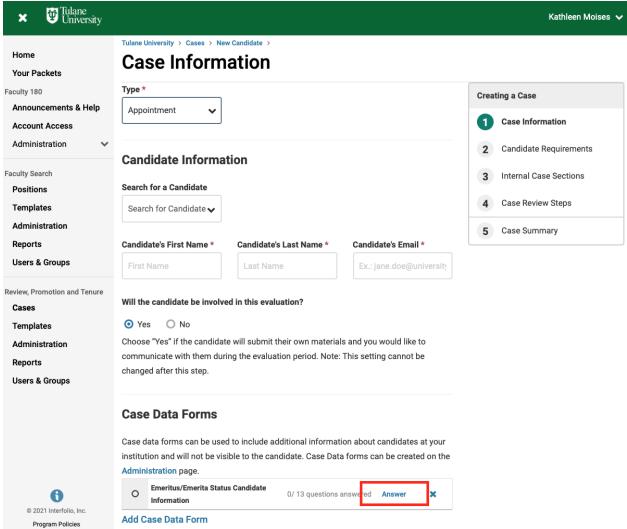


Step 6: Make sure "Type" populates with "Appointment"

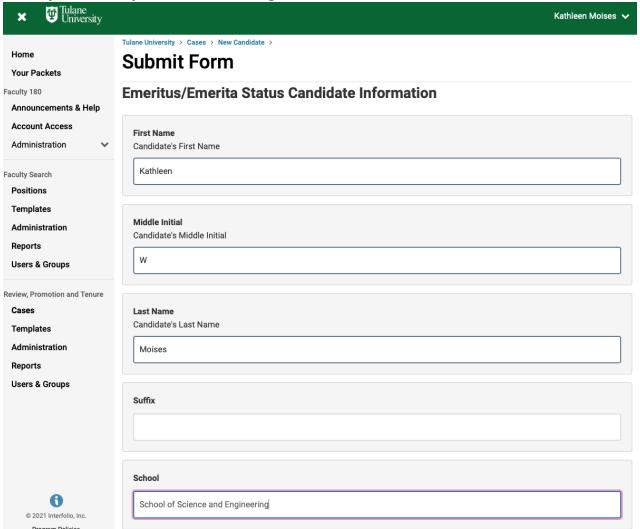


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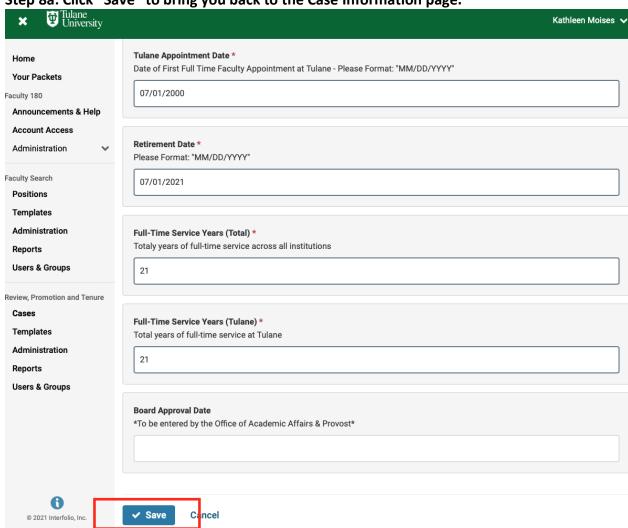
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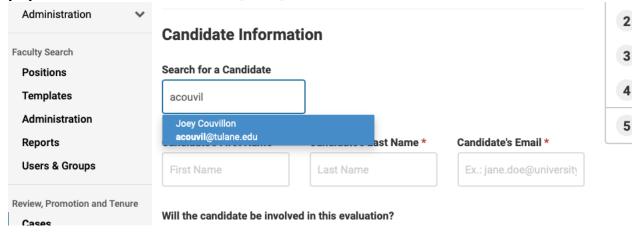
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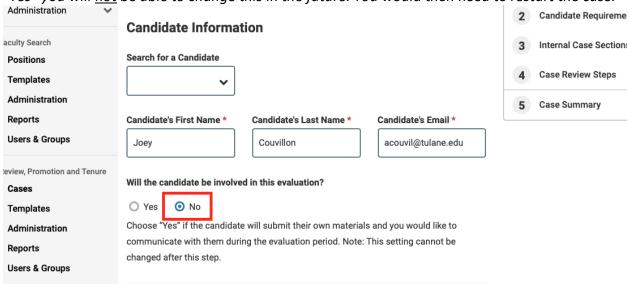


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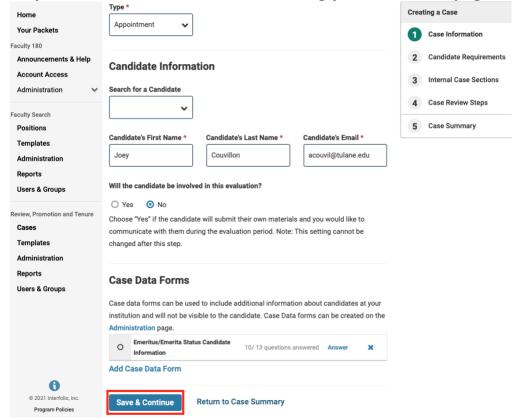


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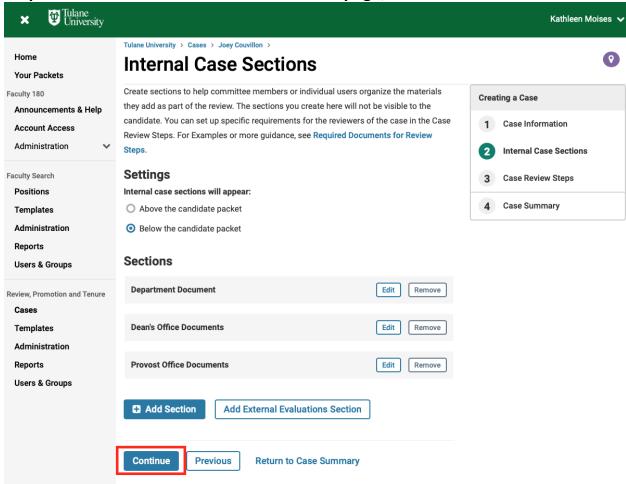
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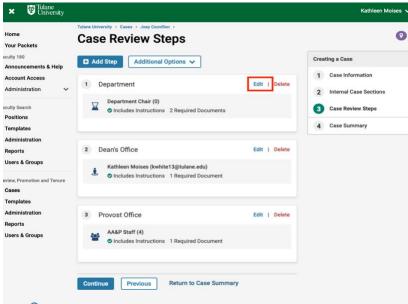
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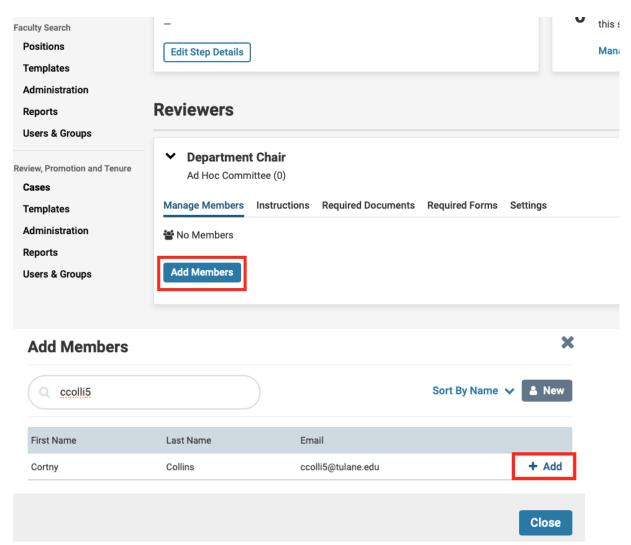
Step 12: Once on the Internal Case Sections page, click "Continue" to move forward.



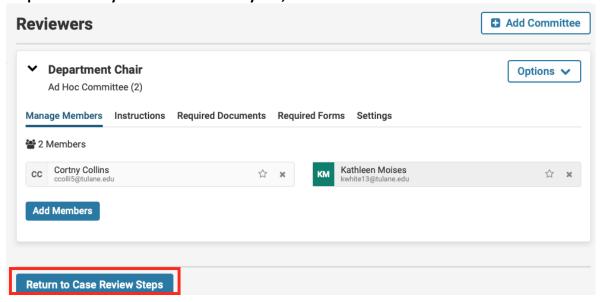
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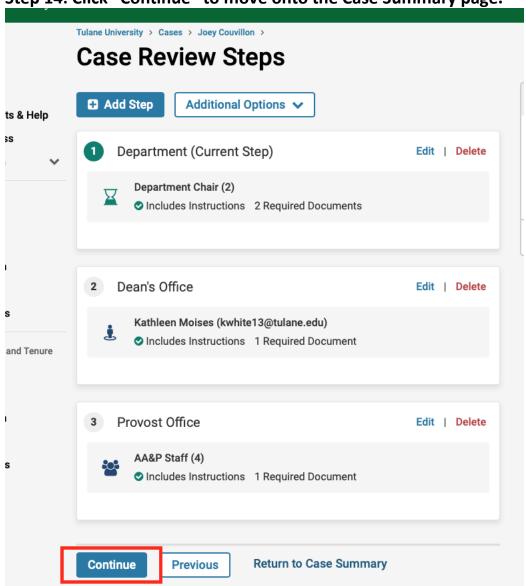
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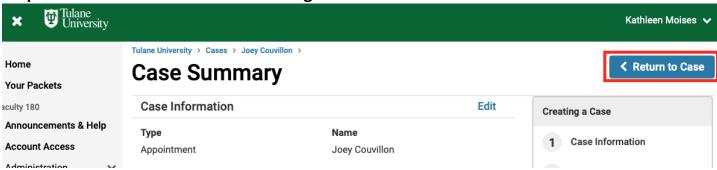
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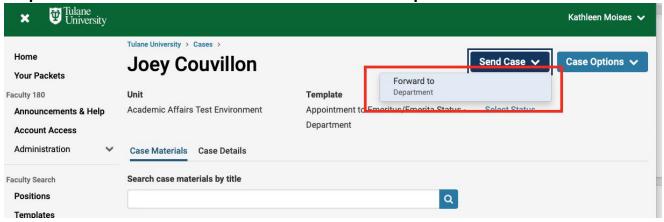
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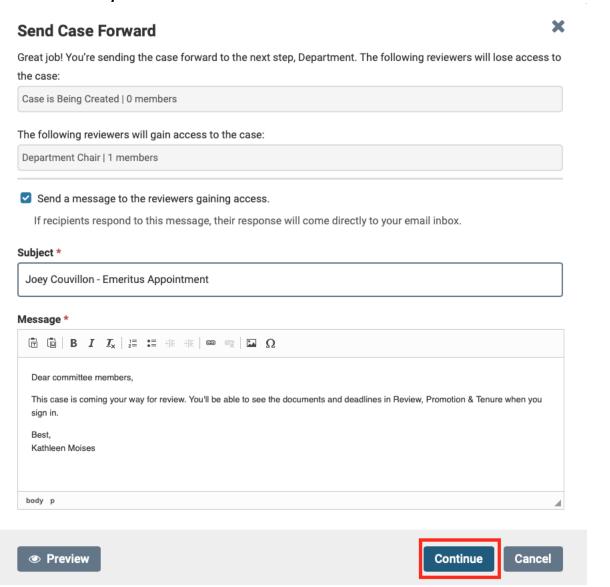
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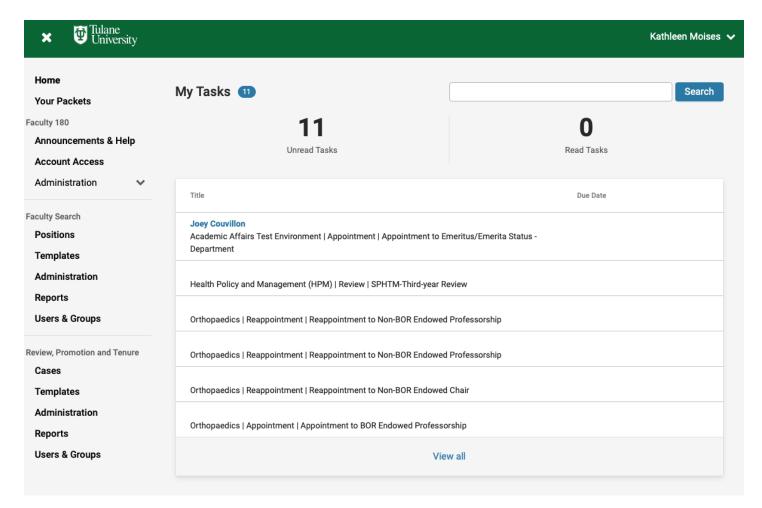


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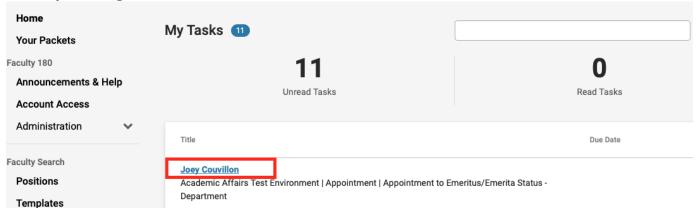


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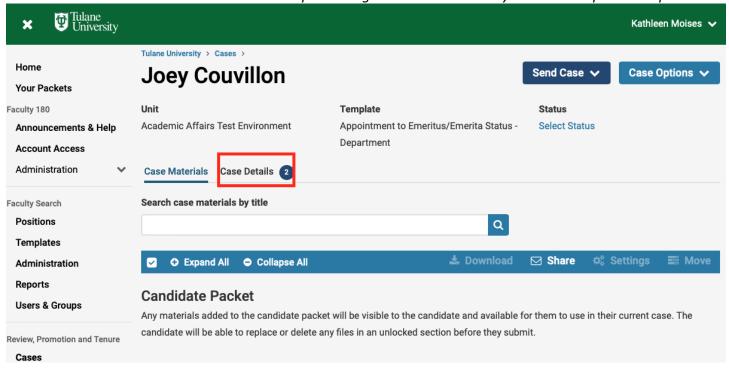


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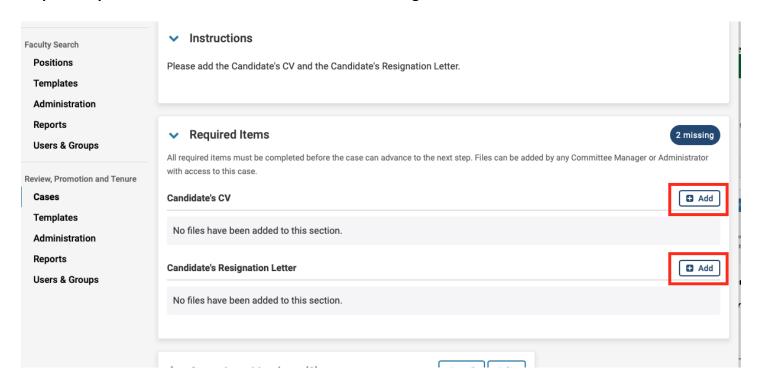


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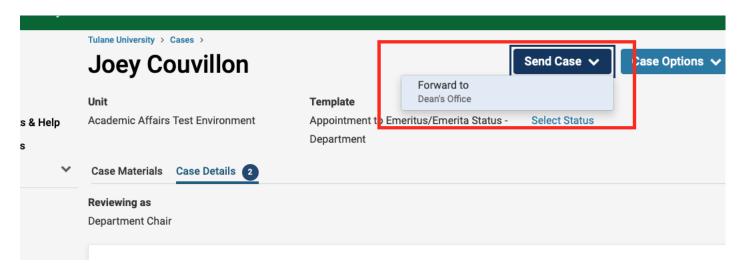


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