

# Completing Committee Manager Tasks

Resources: <https://www.fhsu.edu/academic/provost/digital-portfolio-system> (guides, training, reviewer FAQ)  
8/16/22 step-by-step instruction video <https://app.vidgrid.com/view/IQtHj1WJQHEd>.

All committee members: Open case and select **Read Case** to begin review.

See [https://product-help.interfolio.com/en\\_US/reviewing-cases/view-case-materials](https://product-help.interfolio.com/en_US/reviewing-cases/view-case-materials)

## Committee manager tasks (following initial file review)

Individuals with committee manager access depending on review level: chair, dean, committee chair, admin assistant

Refer to Case Manager Instructions under **Case Details** tab.



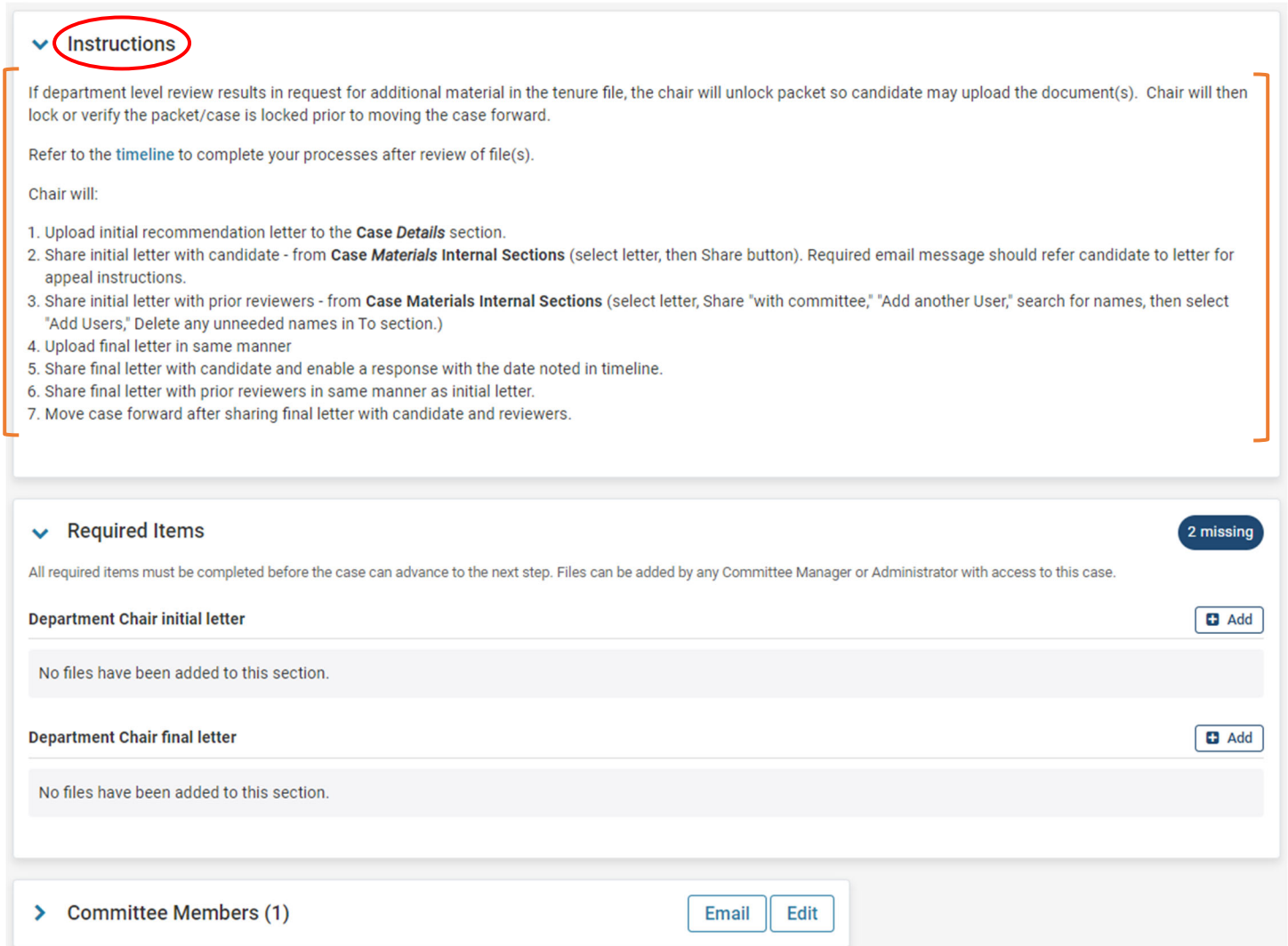
Fort Hays State University > Cases >

### Victor E. Tiger

Unit	Template	Sta
Department of Health and Human Performance	Tenure - 3rd & 4th Year	1

Case Materials Case Details

Instructions will vary by review level.



Instructions

If department level review results in request for additional material in the tenure file, the chair will unlock packet so candidate may upload the document(s). Chair will then lock or verify the packet/case is locked prior to moving the case forward.

Refer to the [timeline](#) to complete your processes after review of file(s).

Chair will:

1. Upload initial recommendation letter to the **Case Details** section.
2. Share initial letter with candidate - from **Case Materials Internal Sections** (select letter, then Share button). Required email message should refer candidate to letter for appeal instructions.
3. Share initial letter with prior reviewers - from **Case Materials Internal Sections** (select letter, Share "with committee," "Add another User," search for names, then select "Add Users," Delete any unneeded names in To section.)
4. Upload final letter in same manner
5. Share final letter with candidate and enable a response with the date noted in timeline.
6. Share final letter with prior reviewers in same manner as initial letter.
7. Move case forward after sharing final letter with candidate and reviewers.

Required Items 2 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

Department Chair initial letter + Add

No files have been added to this section.

Department Chair final letter + Add

No files have been added to this section.

> Committee Members (1) Email Edit

## Unlock / lock case ONLY at department level college / university skip to "Loading initial or final letter..."

- College and University reviewers **DISREGARD**. **DO NOT unlock cases during college or university review**.
- **ONLY** Department / Program / School level when reviewers recommend case corrections.

This packet is locked. Click **Unlock** prior to informing candidate via initial letter or message accompanying the letter.

The screenshot shows a web interface for a candidate packet. At the top, there are two tabs: "Case Materials" (circled in red) and "Case Details" (with a "2" notification). Below the tabs is a search bar for case materials by title, a search icon, and a "Read Case" button. A blue bar contains "Expand All", "Collapse All", "Share", "Settings", and "Move" options. The main section is titled "Candidate Packet" and includes a sub-header "Candidate Packet" with a "Locked" status (circled in red). An "Unlock" button (with an arrow pointing to it) is located to the right. Below this, there is a "Tenure Statement" section with "1 required" and an "Add File" button. A table lists the statement: "Victor E Tiger Tenure Statement year 1" with details "Submitted by Victor E. Tiger Jul 19, 2023" and an "Edit" action.

Packet will lock when candidate submits corrections. (Edits are not viewable to reviewers until candidate selects "Submit.") Committee manager must **verify packet is locked** before moving case forward.

This packet is unlocked. This may be an instance where the candidate elected not to submit corrections.

**Check case for unlocked packet to Lock** before moving case forward.

The screenshot shows the same web interface as above, but the "Candidate Packet" status is now "Unlocked" (circled in red). The "Lock" button (with an arrow pointing to it) is now visible to the right of the status.

## Loading initial or final letter in Required Items

### 1. Navigating to Required Items

- Select **Case Details** tab **Case Materials** **Case Details** (with a "2" notification, circled in red) and scroll to "Required Items"

**OR**


- Under **Case Materials** **Case Materials** (circled in red) **Case Details** (with a "2" notification) scroll to **Internal Sections** (**DO NOT** load required letters here. \*See note below for loading other documents.) and **click View**. View takes you to Case Details, Required Items.

The screenshot shows the "Internal Sections" section. A red box highlights the text: "These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that these sections will not be shared with the candidate by an administrator or committee manager." Below this is a purple warning icon and the text: "You are asked to submit required items as part of this case. **View**" (with an arrow pointing to it).

2. Under Required Items, select “+ Add” on the relevant letter line.

Required Items 2 missing


All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

Dean initial letter 


No files have been added to this section.

3. Browse to upload the letter from your files.

Upload a new file Select file from case



Drag & Drop your files anywhere or



4. Edit document “Name” as needed. Must include reviewer level, initial or final, candidate name, AY or year of review.

4.a. Dean / College Committee letters – change “Section” to “Dean and College....”


Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

**Name \*** Review level, candidate name, initial/final, AY or review year

**Section \***

Chair and Department Committee Review Do ▼

Chair and Department Committee Review Documents

**Dean and College Committee Review Documents**  dean/college ltrs

5. Click “+ Add.”

The letter is now listed in required items and will be viewable within the case by current and subsequent reviewers (not candidate).

**CANDIDATE CANNOT ACCESS THE UPLOADED LETTER yet. It must be “shared” with them and prior reviewers.**

\*Note: If your unit normally sends a separate cover sheet with the recommendation letter, that information could be included in the message when sending the letter (see “Sharing .... letter with candidate”), or the cover sheet may be loaded to the Case Materials Internal Section. The recommendation letter already loaded in Details and the additional document can be selected and shared with the Candidate at the same time from Case Materials.

Continue to “Sharing initial or final letter with candidate” and “Sharing letter with prior reviewers.”

## Sharing initial or final letter with candidate

1. Navigate to **Case Materials** **Case Details** 1, scroll down to "Internal Sections," click section drop down arrow.

### Internal Sections


These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

 You are asked to submit required items as part of this case. [View](#)

 > Chair and Department Committee Review Documents

Edit

Add File

 > Dean and College Committee Review Documents

Edit

Add File

2. Select box next to letter. *Candidate cannot access/view shared doc if the box is not checked.*

▼ Dean and College Review Documents

Edit

Add File

**PLEASE READ: DO NOT** add recommendation letters here. Go to **Case Details** tab (top of case) **first** to load letters in the Case Details "Required Items" and select dean section. Recommendation letters will then automatically save here. Candidate response will also save to this internal section. This internal section is **NOT** visible to the candidate.

Then return to this Case Materials section to **select and share initial and final letters** with candidate and previous reviewers.

#### Materials

Title	Details	Actions
<input type="checkbox"/> College cmt initial recommendation V Tiger 22-23	Added by Janet Kohl Jul 28, 2023	Edit
<input type="checkbox"/> College cmt final recommendation V Tiger 22-23	Added by Janet Kohl Jul 28, 2023	Edit
<input checked="" type="checkbox"/> Dean initial rec V Tiger year 3	Added by Janet Kohl Jul 28, 2023	Edit

3. Select **Share** (top of screen) and "With Candidate."

 Share

With Candidate

With Committee Members



6. Candidate response to **FINAL** recommendation letter. Skip step 6 when sharing **initial** recommendation letter.

Step 6 **only** applies to sharing the **final** letter with candidate.

- a) Select "Enable"
- b) Add Message Reason "Optional response to final recommendation letter"
- c) Enter Deadline date (Last day of 3-day period that candidate may respond per MOA. See relevant [timeline](#). Candidate will only be allowed to respond on or before this date.)
- d) Select Section

**Details**

**Direct email reply:**  
jakohl2@fhsu.edu

**File Response:**  
 Enable  
When you share a file for the recipient to review, you can check this box to allow them to submit a file in response. Check this option to allow the recipient of this message to submit a file in response.

**Message Reason**  
Optional response to final recommendation letter

**Deadline** ⓘ  
Mmm d, yyyy ⓘ

**Section for Response \***  
- Select Section -  
- Select Section -  
Candidate Packet  
Candidate Packet  
Internal Sections  
Chair and Department Committee Review Documents  
Dean and College Review Documents

Select "Chair and Department ..." for response to chair or dept committee.

Select "Dean and College..." for response to dean or college committee.

7. Click **Preview** (optional) to view the message as it will appear to the candidate. Select "Edit" to return to the message or proceed to step 8 if no change is needed.

8. Click **"Send"** to complete the process or **"Cancel"** to exit without sending or editing and return to the case.

Any response submitted will now save to the selected internal section and be viewable by subsequent case reviewers.

Sharing letter with prior reviewers Department/Program/School Committees will disregard this process. \_\_\_\_\_

This process is similar to sharing letters with the candidate with the exception of steps below.

1. Select letter (see steps 1 & 2 of sharing with candidate) in the Case Materials Internal Section then **Share** (top of screen) **"With Committee Members."**

Share

With Candidate

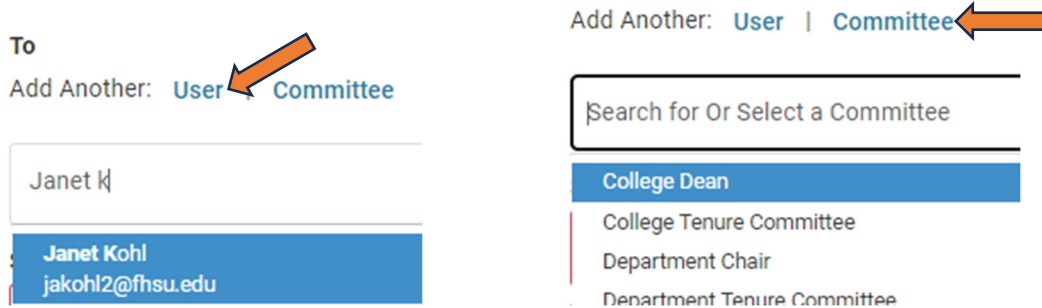
With Committee Members

2. The "To" section will list members of your committee. **Delete these names** unless you intend to share the document with them as well.

### Message to Committee



3. **Add previous** committee chairs, chair, dean, admin assistants as appropriate. **Select "User"** and **type the individual's name** to select from the Interfolio autogenerated list **and/or** **Select "Committee"** and **choose** from the drop-down list.



**Individuals:** After selecting name(s), **"Add User(s)."** Names will not be included if the "Add" step is skipped.



**Committees:** After selecting each committee, **"Add Members."** Names will not be included if the "Add" step is skipped.



4. **Check the "To" group** to **verify correct recipient list**. **Delete** non-chairing committee members or errors as needed.



**Continue** with **steps 4, 5, 7, and 8** of Candidate letter-sharing process.

**Sample text for Message to prior reviewers:** The Dean's initial tenure recommendation letter has been uploaded to Dr. Doe's case. When logging into Interfolio, find the document under "Files have been shared with you."

**TIP:** This can be repeated as needed. If a required recipient was accidentally left off when sharing letters, the process above can be repeated with only that individual in the "To" group. Recipients are notified individually whether notice is sent to one person or a group.

Recipient's email notice to view a shared letter:

Janet Kohl has shared files with you.



You will be required to sign in to your account to view the shared files.

## Sending Case(s) forward to next review level

### A. Sending a single case forward:

With the appropriate case open, **select Send Case**, then **Forward to** (next level of review is only option).

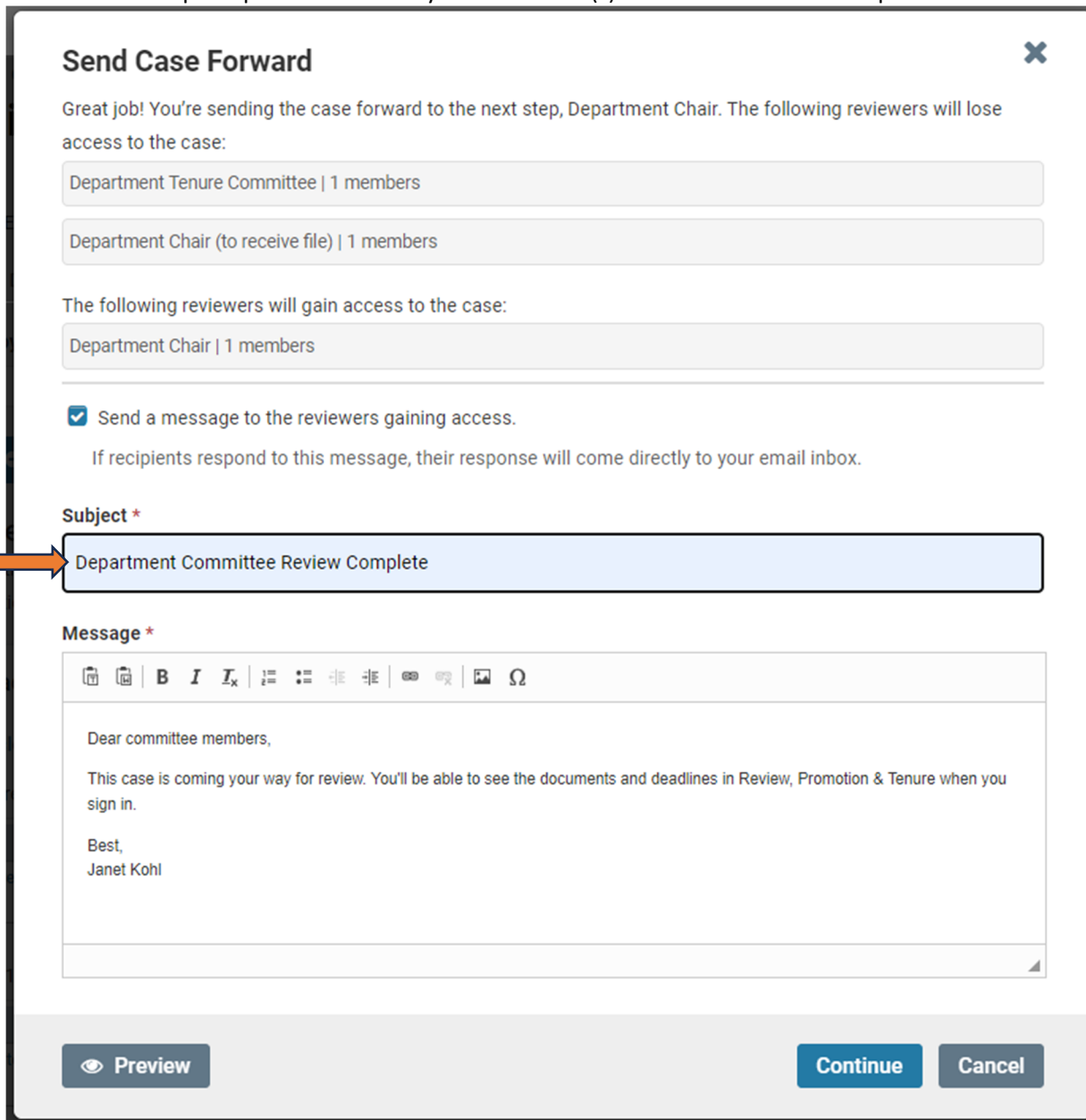


The screenshot shows the 'Victor E. Tiger' case page. The breadcrumb trail is 'Fort Hays State University > Cases >'. The case title is 'Victor E. Tiger'. Below the title, there are two columns: 'Unit' (Department of Management) and 'Template' (Tenure - 3rd & 4th Year). On the right side, there is a 'Send Case' dropdown menu. An orange arrow points to the 'Send Case' button, and another orange arrow points to the 'Forward to' option in the dropdown menu, which is currently expanded to show 'Dean' and 'Backwards to Department Chair'.

Whether sending one or multiple cases (see option B below), the next box indicates who will no longer have case access and who is gaining access. When sending multiple cases, all cases moving forward will be listed as well.

**Enter subject.** The Message contains Interfolio-generated wording. Leave as is or edit as desired.


**Continue** to complete process and notify next reviewer(s). **Cancel** will back out of process.




The 'Send Case Forward' dialog box is shown. It has a title bar with a close button (X). The main content area contains the following text: 'Great job! You're sending the case forward to the next step, Department Chair. The following reviewers will lose access to the case:'. Below this, there are two input fields: 'Department Tenure Committee | 1 members' and 'Department Chair (to receive file) | 1 members'. The next section is 'The following reviewers will gain access to the case:', followed by one input field: 'Department Chair | 1 members'. There is a checked checkbox for 'Send a message to the reviewers gaining access.' with the subtext 'If recipients respond to this message, their response will come directly to your email inbox.' Below this is the 'Subject \*' field, which contains 'Department Committee Review Complete'. An orange arrow points to this field. The 'Message \*' field contains a rich text editor with the following text: 'Dear committee members, 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, Janet Kohl'. At the bottom of the dialog, there are three buttons: 'Preview', 'Continue', and 'Cancel'.



## B. Sending multiple cases simultaneously:



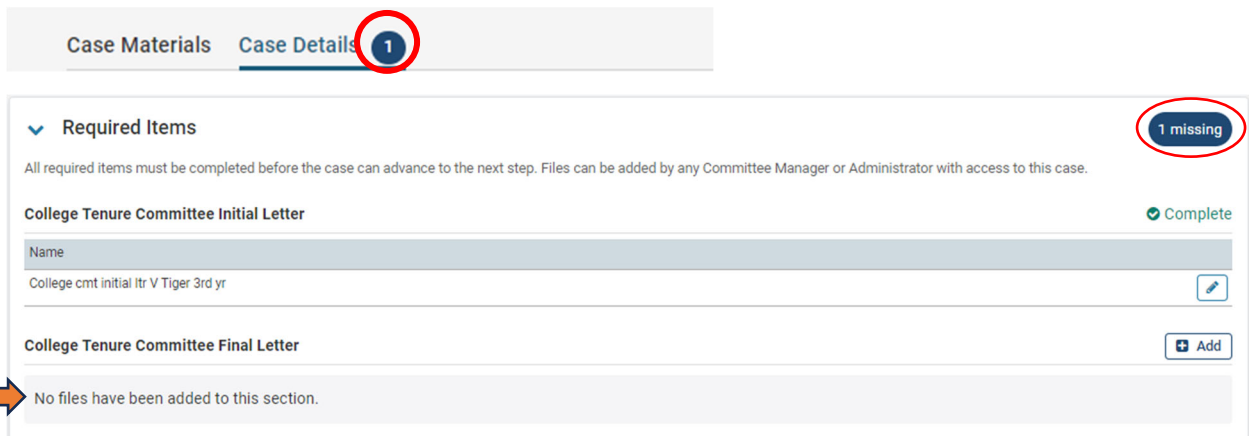
In Cases view **Cases** Select box next to each case

Select **Send Forward** in the top menu bar 

Proceed in the same manner as sending a single case.

**REMINDER:** Load and share letters **before** moving case forward. See “Loading Initial or Final Recommendation Letter,” “Sharing Initial or Final Letter with Candidate,” and “Sharing Initial or Final Letter with Prior Reviewers.”

If you are not being allowed to send the case forward, check for a missing document(s) in **Case Details, Required Items**.



Case Materials **Case Details** 1

Required Items 1 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

College Tenure Committee Initial Letter Complete

Name  
College cmt initial ltr V Tiger 3rd yr


College Tenure Committee Final Letter Add

No files have been added to this section.

The letter was likely loaded to Case Materials instead of Case Details. See “Adding a required letter to ...” below to add the letter to Case Details.

## Uploaded Letter Troubleshooting

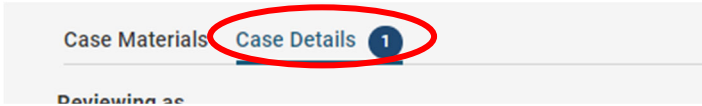
### Correct loaded letter title or move letter to appropriate section

You can rename or move your uploaded letters any time you see “Edit” or the pencil icon . This may be needed when, for example, the dean’s letter was saved in the chair/department documents or the file name didn’t include all required information. Simply **select Edit or the pencil** then **Edit Details or Edit Settings** to make corrections, and/or move letter to correct section, or delete the document.

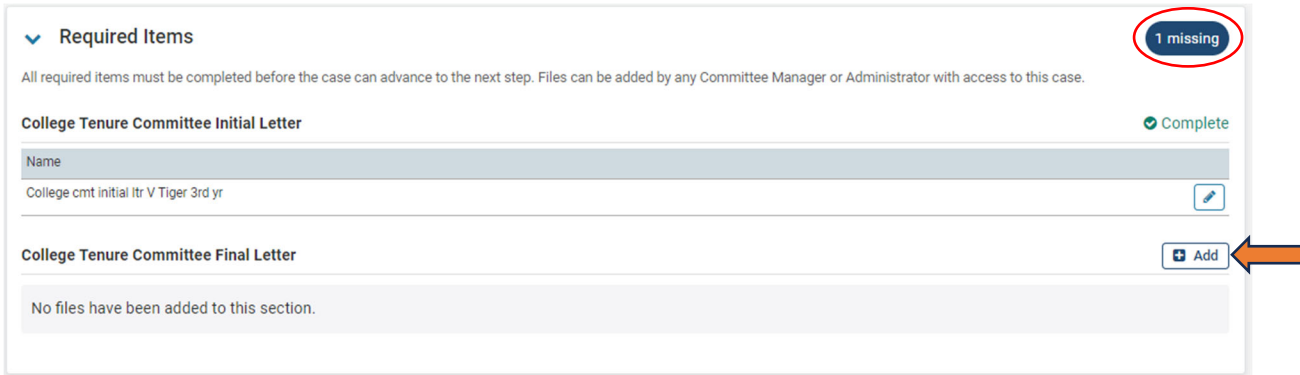
## Adding a required letter to Case Details when it was initially loaded to Case Materials

If letters were added to the case, but the Case Details tab still has a circled 1 or 2 next to it, the letters were likely loaded to Case Materials instead of Required Items in Case Details. The case cannot be moved forward until Case Details Required Items are complete.

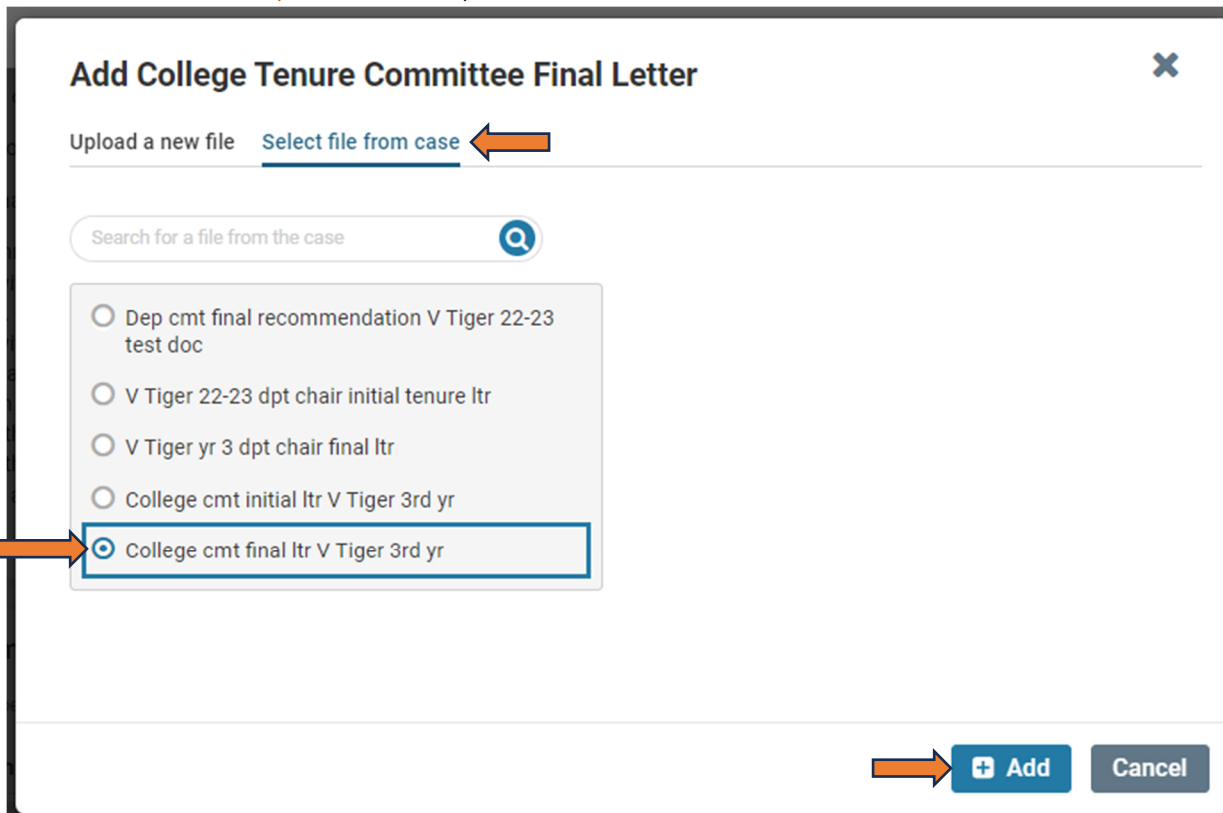
Click on **Case Details** tab,



Scroll down to **Required Items** and **+ Add** next to missing item.



“Select Files from Case,” select the file, then **+ Add**.



Next, open the selected letter from Required Items to **verify it is the correct document**. This is especially important if any recommendation letters are not clearly titled with review level and initial/final.

Proceed with moving the case forward.

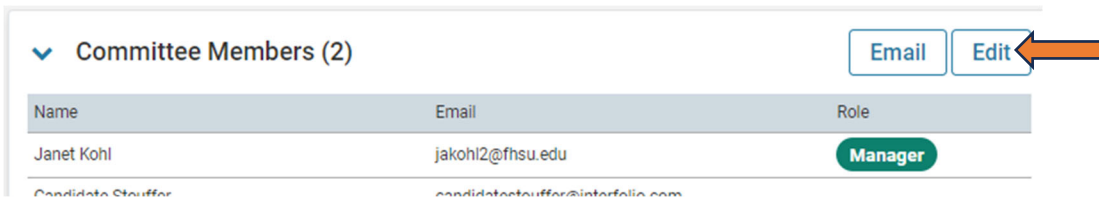
## Changing or adding committee manager access if needed

The committee chair is marked as “Manager” for access to complete Committee Manager tasks. When another committee member is designated as chair or is assisting with CM tasks, the committee chair or administrative assistant can add Manager access for that individual.

Scroll down to Committee Members under Case Details tab.

Case Materials **Case Details** 1

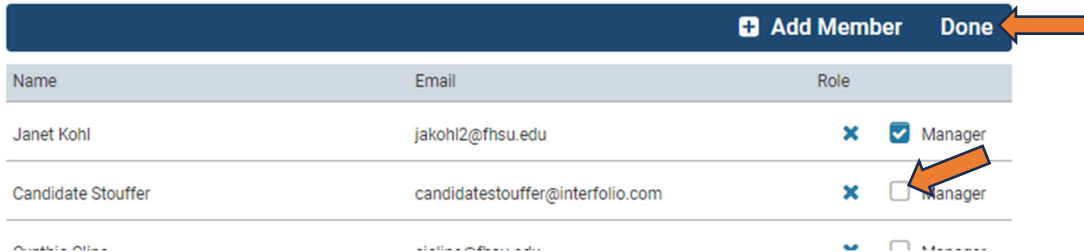
Select Edit.



Committee Members (2)

Name	Email	Role
Janet Kohl	jakohl2@fhsu.edu	Manager
Candidate Stouffer	candidatestouffer@interfolio.com	

Check the Manager box next to the individual’s name, then Done.



+ Add Member Done

Name	Email	Role
Janet Kohl	jakohl2@fhsu.edu	<input checked="" type="checkbox"/> Manager
Candidate Stouffer	candidatestouffer@interfolio.com	<input type="checkbox"/> Manager
...	...	...

Resources: <https://www.fhsu.edu/academic/provost/digital-portfolio-system> (guides, training, reviewer FAQ)  
8/16/22 step-by-step instruction video <https://app.vidgrid.com/view/IQtHj1WJQHed>.