As an RTP or Lecturer evaluator/reviewer there are 2 methods to move submitted portfolios to the next review level, by the annual deadline published in the FAR evaluation time tables:

1. Method #1: Moving cases forward on an individual basis
   a. After logging in, click on an individual faculty name, to open a case that has been assigned to you as a reviewer:
   
   ![Image of Case List](image1)
   
   b. Click the "Send Case" button to open drop down menu and select the option available
c. A message interface will pop up, you will need to fill in the necessary portions (indicated by an *).
   i. Then click "Continue"

   

   ... (Image of email interface showing forward to Departmental Review)

   ii. Text in both the Subject Line & the Message box is Mandatory. The case cannot be forwarded if these boxes are blank

   ... (Further Image of email interface with fields clearly marked)

   iii. When you click "Continue" the message and case will be sent to the next review level, and you will lose access to the case if you are:
      i. A Department or DPC Chair forwarding an RTP portfolio to the College Dean
      ii. A Department Chair forwarding a Lecturer WPAF to the DPRC
      iii. A DPRC Chair forwarding a Lecturer WPAF to the Department Chair
      iv. A Department Chair forwarding a Lecturer WPAF to the College Dean

   ... Button Click Here last
2. Method #2: Moving multiple cases forward at the same time

**Please NOTE:** this method for moving cases forward is very useful if the Interfolio server is slow in opening up individual cases or if the Send Case button is non-responsive

a. To initialize this second method, Click on "cases" on the Left-hand menu of the Interfolio interface. It is located directly under "Review, Promotion, and Tenure".

b. Click HERE 1st

c. Once the Case list has popped up turn on the filters and select your unit

d. The cases will filter to only the cases created for faculty in that particular unit
f. Click the check box next to the name of the person whose review you want to forward to the next review level. Once the check box is clicked by at least one or more names a new menu bar will pop up at the top of the screen.

When you click the check box, the blue menu bar appears.

As you can see the selected department is reflected in the faculty info.
ii. If you click the check box next the word "name" all the faculty members in the unit will be selected to be sent forward or backward

5 of 5 cases

1.

Tuffy Titan
Sample Department

Step 1 of 7: Chair Declares Comple

i. Click "Send forward" and a message interface will pop up

 Notify Candidates  Send Backward  Send Forward
iii. In this message interface you will need to fill in the necessary portions (indicated by an `*`).
   i. Then click "Send"
Send Cases Forward

If recipients respond to this message, their response will come directly to your email inbox.

**Subject** *

Evaluation is completed

**Message** *

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,

Mary Pons

- Text was inputted here and the send button is now functional as a result

- Click HERE

h. When you click "Send" the message and cases you selected will be sent to the next review level, and **you will lose access** to the case if you are:
   i. A Department or DPC Chair forwarding an RTP portfolio to the College Dean
   ii. A Department Chair forwarding a Lecturer WPAF to the DPRC
   iii. A DPRC Chair forwarding a Lecturer WPAF to the Department Chair
   iv. A Department Chair forwarding a Lecturer WPAF to the College Dean

***END OF TUTORIAL***