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# INTERFOLIO: WWAMI SITE FACULTY APPOINTMENT GUIDE

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Administrator User Role



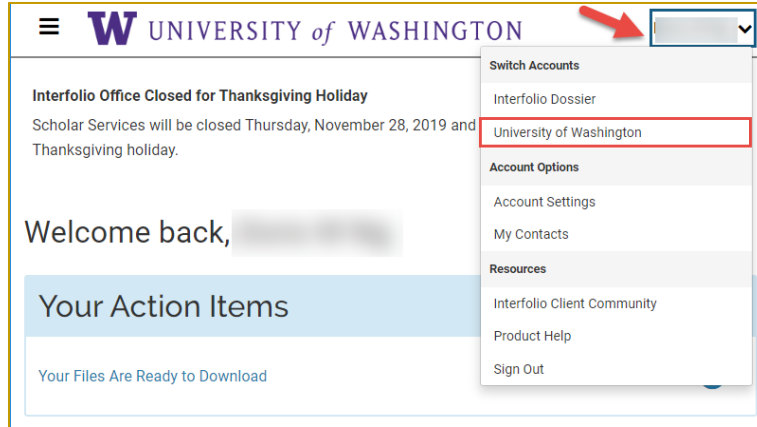
UW SCHOOL OF MEDICINE  
Academic Appointments & Compensation  
Revised 4/1/2023

**LOGIN and NAVIGATE TO THE INSTITUTIONAL ACCOUNT:**

- 1) Use Firefox, Chrome, Edge or Safari browsers to click on this link [SSO Login \(interfolio.com\)](https://interfolio.com) or enter the address <https://account.interfolio.com> which will take to the Partner Institution sign in. Then select the institution. Hint: type in WAS to pull-up **University of Washington**.

- 2) The UW netID portal will appear. *Administrators who manage the cases, must use their UW netID and password to log in!* After logging in, a window option may come up to select your dashboard of either University of Washington or Dossier, please choose University of Washington. This allows the user to take actions as a UW administrative staff and handle the case.
  - You can also change your dashboard by going to the drop-down found on the top-right by your name.

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### ADD AN INDIVIDUAL USER TO INTERFOLIO-RPT

For a new appointment, we know that the candidate is probably not yet affiliated with the institution yet and will not be found in the database. As a result, you will need to add the individual to the system using their first and last name and an email address (preferably an @uw.edu email address if that exists). To add an user, go to the Users and Group menu > under the Users tab, click on Add user > enter in the information for the required fields.

**IMPORTANT:** Keep the default box requiring the user to be verified via Single Sign-On (SSO) checked. Also, DO NOT send the user a welcome message to notify them of the new account for data security purposes. This is not necessary because the candidate will not be using Interfolio. It is possible for them to gain access to Interfolio once they are affiliated with the institution and have an updated @uw.edu email address.

Refer to the link for more instructions <https://product-help.interfolio.com/m/33238/l/344649-add-new-users-to-review-promotion-tenure>

**Add User** ✕

**First Name**  **Last Name**

**Email**

If checked, this user will need to sign on using their institutional credentials.

**Unit**

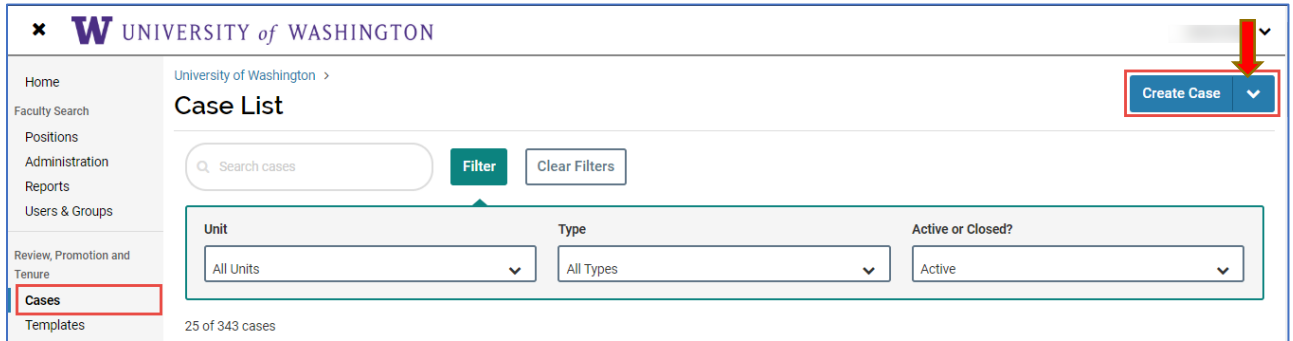
Send the user a welcome message.

### HOW TO CREATE CASE

- 1) From the left-hand menu, click on “Cases.” This will take you to the Case list page with the names of all the active cases in progress.

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- 2) To create a NEW Case based on a pre-existing template: [https://product-help.interfolio.com/en\\_US/creating-cases/create-cases-in-bulk-for-multiple-candidates-at-once](https://product-help.interfolio.com/en_US/creating-cases/create-cases-in-bulk-for-multiple-candidates-at-once)
  - a. click on the button found on the top-right “**create case**” and continue to Case setup.  
NOTE: you must click on the drop-down arrow to activate the create multiple case function (using the same template for the batch).



- 3) You will begin at 1 Case setup. Complete the information in the fields.
  - For WWAMI appointments: select type=Appointment
  - For WWAMI promotions: select type=Promotion

In which unit would you like to create your cases? \*

– Search for or select a unit – Your unit name

What type of cases are you creating?

Select Type –

- a. Select the template for the case.
  - For appointments: **WWAMI Faculty Appointment-Initiation**. (Note: the template name should contain the correct WWAMI site) You can preview the template (skip to FYI section for more information), but it should be correct as any changes are to be managed by ARRA or AAC. Click on **Select** and if this is correct, click on **Continue to go to case setp 2**.

Select the template for the cases

Search cases

Appointment | WWAMI Faculty Appointment-Initiation

WWAMI-Wyoming

Wyoming: Initiation process to establish a UW faculty appointment for faculty working at WWAMI sites. (EXCLUDES: King and Pierce county sites.)

Preview Select

- 4) In 2 of case setup, select your Candidate(s).
  - a. **IMPORTANT:** select NO as the candidate will not be participating in the case workflow such as submitting documents.

University of Washington > Cases >

## 2. Select Candidates

Will the candidate submit their packet?  
Choose "Yes" if the candidate will submit materials online through Interfolio. This setting can not be changed after the case has been created.

Yes

No

Add 1 or more candidates

[+ Add Candidates](#)

[Continue](#) [Previous](#) [Cancel](#)

Then click on the “**Add Candidates**” button and a new window will open for you to search and add one or multiple candidates using this same exact template. Tip: use the netid or the first couple letters of the email for faster results. If the candidate exists in the system, the name will appear. Click on “**+Add.**” Continue as needed to create more cases. Then, click on “**Done**” to create the case(s). *If the name does not appear, please go back to the Add an Individual User section.*

**Add Candidates**

Search by name, email or unit

aaa

Show 10

0 of 1 added | [Add remaining 1 on this page](#)

Name	Units	Actions
AAA Faculty dng@zzz.edu		<a href="#">+ Add</a>

- 5) The system will take a few seconds to create the case. Review Summary and Confirmation page. (As mentioned previously, you DO NOT need to notify candidates. You also DO NOT need to set any Packet due date.) You can scan through the page, but you do not need to make any entries or changes. Click on Create Cases to continue.

**FYI Preview template:** you may wish to **Preview** the template to make sure the steps and committees is accurate. It should have a list of all the required Candidate documents and 4 case review steps. See example below. Template change requests should be discussed with ARRA.

- Curriculum Vitae, 1 required
- WWAMI Personal Data Form, 1 required
- Sexual Misconduct Declaration Form, 1 required
- UW Criminal Conviction Disclosure Form\* (only required for clinical faculty appointments), up to 1 optional
- Washington State Patrol (WSP) Form\* (only required for clinical faculty appointments), up to 1 optional

**Preview: WWAMI Faculty Appointment-Initiation**



Case Review Steps

▼ 1. WWAMI Site Administration Preparation

- 👤 ARRA Committee Review (2), Includes Instructions, No Required Documents
- 👤 WWAMI Site Administration - Alaska (2), Includes Instructions, No Required Documents

▼ 2. ARRA Committee Review

- 👤 ARRA Committee Review (2), Includes Instructions, No Required Documents
- 👤 WWAMI Site Administration - Alaska (2), Includes Instructions, No Required Documents

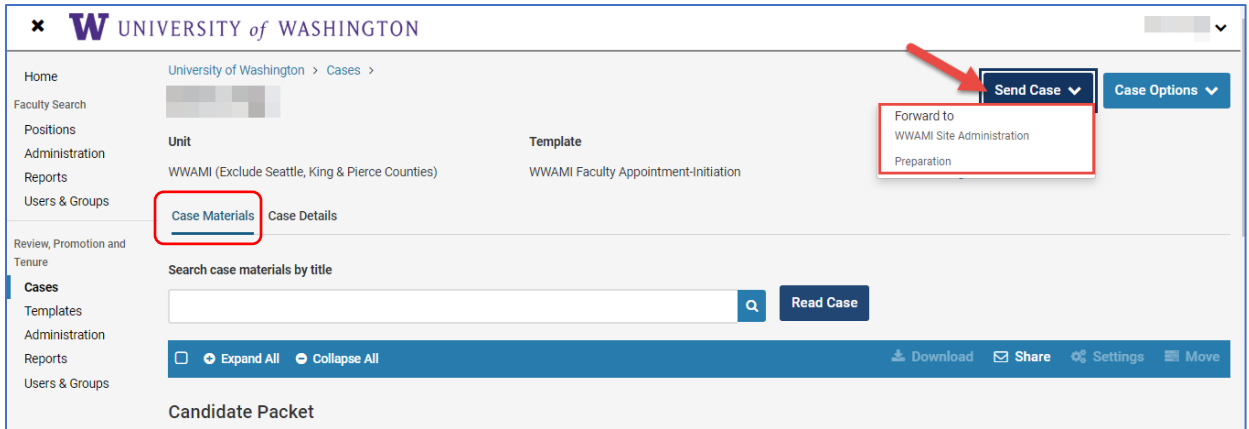
> 3. DEPT-WWAMI Appointment Review

> 4. WWAMI Appointment Workday Decision

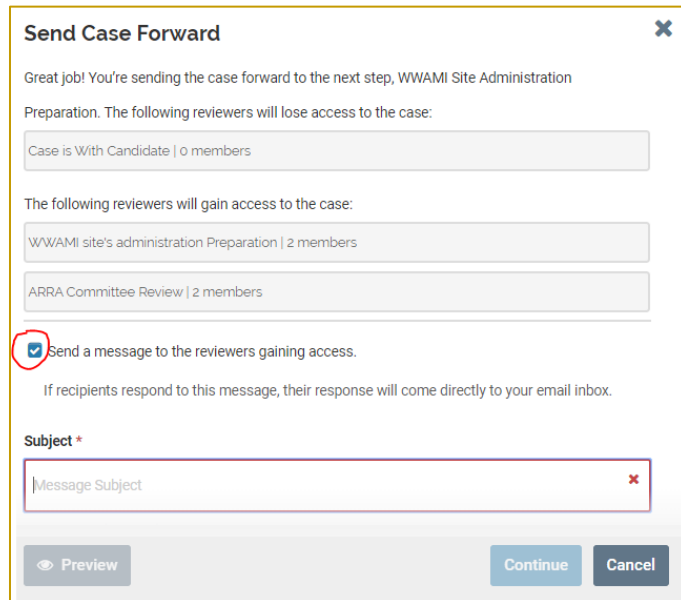
6) Once it is complete, the case displays a **Case Created** status which means the **case is on stand-by until the administrator sends the case to begin the process.**

<input type="checkbox"/>	<p><b>Doris W Ng</b> WWAMI-Alaska</p>	<p>Appointment</p>	<p>WWAMI Faculty Appointment-Initiation</p>
<p><b>Case Created:</b> Waiting for an administrator to send the case forward</p>			

- 7) The administrator **MUST** advance the case to step 1 to initiate the workflow. To do so: <https://product-help.interfolio.com/m/33238/l/344705-move-a-case-forward-or-backward>
- a. Go to the case list page and click on the case name to open the case you just created. This will take you to what the case materials (Documents) Page.
  - b. Click on the " Send Case" button. The next committee to receive the case will appear. If this is correct, click on the review step's name.



- c. DEFAULT: there will always be an option for you to send an email message to the next review committee(s) when a case is moved. **THE BEST PRACTICE** is to send a notification if the case is moving to another unit/department to ensure hand-off and communication takes place. These emails are captured in the system and kept within the [case's activity log](#).
  - You may click on preview to **preview** the email for any edits before sending.
  - If the email is ready, click **continue** to send.
  - If you want to exit this step, click on **cancel**.



- d. Alternative message option (customize your recipients): Once the case is initiated, you can use the email function found in the “Case Details” Tab. You will be able to communicate with the identified committees or members within the database. Additionally, you can find instructions to help walk through the process.

**Unit**  
WWAMI-Alaska

**Template**  
WWAMI Faculty Appointment-Initiation

**Status**  
● Approve [change](#)

**Case Materials** | **Case Details**

**Reviewing as**  
WWAMI Site Administration - Alaska [change](#)

**Instructions**

WWAMI site administrator will:

- will transfer the application materials from the external source to Interfolio by clicking on the “add file” button in the appropriate sections such as **Candidate documents** or **Other Candidate Documents**.
- Once the case is complete and there are no issues, the WWAMI administrator will **send case** forward to ARRA Committee Review with a notification to the committee.

**Committee Members (2)** [Email](#) [Edit](#)

Name	Email	Role
Shyla Cochran-Dema	sdema@uw.edu	<b>Manager</b>
Ciera Stafford	cejstaff@uw.edu	<b>Manager</b>

**Conversation (0)** [Turn Off Comments](#)

No Comments Yet

[Add Comment](#)

8) Once sent, the case step will update with a 1 of #. Administrators can track the progress of the case by checking the case list page.

**Candidate Name** Appointment WWAMI Faculty Appointment-Initiation

WWAMI (Exclude Seattle, King & Pierce Counties)

**Step 1 of 3: WWAMI Site Administration Preparation**

### ADD FILES TO THE CASE

<https://product-help.interfolio.com/m/33238/l/344721-adding-and-managing-case-materials>


Since the administrator is loading the case materials for the candidate’s appointment, the administrator will need to go into the candidate’s case > click on the “add file” button to either drag and drop or select by browsing the computer for the appropriate document. Documents should be loaded as each item.

Letter(s) of Recommendation should be loaded into **External Evaluations** for it to be confidential. (This action will be recorded in the activity log.)



### 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.

 External Evaluations

[Request Evaluation](#)

[Add File](#)

**BEST PRACTICE:** When all the documents are loaded, click on the LOCK button to lock the candidate documents.

**NOTE:** all documents will be converted to PDF. The system may take a little longer to load and convert if the documents are in other formats other than PDF.

- 9) When all actions are completed by the WWAMI administrator and the case is ready to go to the ARRA Committee Review, click on **Send Case**. Refer to above step 5 for instructions. Your case should look like the below and be in step 2 of 4!

~~~~~ THE END ~~~~~

### Contact

Doris Ng [dng@uw.edu](mailto:dng@uw.edu) for UW Interfolio technical support or questions

Interfolio (direct): [help@interfolio.com](mailto:help@interfolio.com)