

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

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 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 not 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



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. A left-hand menu lists various services like EBS (TAMS, HCM and E-IT), Wireless Guest Access, OrgSync, Employee Self-Service, Kronos, Kronos for Timekeepers, Canvas, Course Evaluations, Splash Card, Major/Minor Certification, Training Wave, Concur, Interfolio, Comm, Enrollment Services, Cognos Finance Reporting, Cognos Student Reporting, SciQuest eProcurement, and Service Wave. The main content area features three blue header boxes: 'All-Campus Town Hall: Climate Survey Results + Discussion', '2017 W-2', and 'Banking Routing Scam'.

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 like '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 is titled 'Cases' and has a search bar with a 'Filter' button. Below the search bar, there is a table of cases. The table has columns for 'Name', 'Type', 'Template Name', and 'Status'. There are three rows of cases, each starting with a checkbox and the text 'New Candidate'. The first row has 'Appointment' as the type and 'ctobyn - testing' as the template name. The second and third rows have 'Custom Workflow' as the template name. A red box highlights the 'Create Case' button in the top right corner.

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' and there is a close button (X) in the top right corner. Below the title, there is a prompt: 'Please select an organizational unit for this case.' Below the prompt, there is a search bar with the text 'science' entered. Below the search bar, there is a list of organizational units. The first item is 'School of Science and Engineering', which is highlighted with a red box. Below it are 'Computer Science', 'Earth and Environmental Sciences', 'Neuroscience', and 'River Coastal Science and Engineering'. At the bottom of the dialog box, 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 'Appointment to Emeritus/Emerita Status' template is highlighted with a red box. A tooltip on the right explains that 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 6: 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', with an arrow pointing to it and a note: 'This should auto-populate "Appointment"'. The 'Candidate Information' section has a search box for a candidate. The 'Creating a Case' sidebar shows a progress indicator with 'Case Information' as the first step.

Case Information

Type *
Appointment

Candidate Information

Search for a Candidate
Search for Candidate

Creating a Case


- 1 Case Information
- 2 Candidate Requirements
- 3 Internal Case Sections
- 4 Case Review Steps
- 5 Case Summary

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.

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 three sections: 'Case Information', 'Candidate Information', and 'Case Data Forms'. The 'Case Information' section includes a 'Type' dropdown menu set to 'Appointment'. The 'Candidate Information' section features a 'Search for a Candidate' dropdown and three input fields for 'Candidate's First Name', 'Candidate's Last Name', and 'Candidate's Email'. The 'Case Data Forms' section contains a list of forms, with 'Emeritus/Emerita Status Candidate Information' selected. This form has '0 / 13 questions answered' and a blue 'Answer' button highlighted by a red box. A 'Creating a Case' sidebar on the right lists five steps: 1. Case Information, 2. Candidate Requirements, 3. Internal Case Sections, 4. Case Review Steps, and 5. Case Summary. The left sidebar contains navigation options such as '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'. At the bottom left, there is a copyright notice for Interfolio, Inc. and a link to 'Program Policies'.

Step 8: 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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Program Policies

Step 8a: 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 9: 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 *

First Name Last Name Ex.: jane.doe@university

Will the candidate be involved in this evaluation?

2
3
4
5

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 not be able to change this in the future. You would then need to restart the case.

Administration

aculty 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 Requireme

3 Internal Case Section:

4 Case Review Steps

5 Case Summary

Step 11: 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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Program Policies

Step 12: 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 Moises'. Below the header, a breadcrumb trail reads 'Tulane University > Cases > Joey Couvillon >'. The main heading is 'Internal Case Sections'. A purple question mark icon is in the top right corner. The left sidebar contains navigation links: 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. The main content area has a sub-heading 'Internal Case Sections' and a paragraph: 'Create sections to help committee members or individual users organize the materials they add as part of the review. The sections you create here will not be visible to the candidate. You can set up specific requirements for the reviewers of the case in the Case Review Steps. For Examples or more guidance, see [Required Documents for Review Steps](#).' Below this is a 'Settings' section with the heading 'Internal case sections will appear:' and two radio buttons: 'Above the candidate packet' (unselected) and 'Below the candidate packet' (selected). The 'Sections' section lists three items: 'Department Document', 'Dean's Office Documents', and 'Provost Office Documents', each with 'Edit' and 'Remove' buttons. At the bottom of the sections list are two buttons: 'Add Section' and 'Add External Evaluations Section'. At the very bottom of the page are three buttons: 'Continue' (highlighted with a red box), 'Previous', and 'Return to Case Summary'.

Step 13: On the Case Review Steps page we will now edit the Department section. Click “Edit”.

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 Moises'. Below the header, a breadcrumb trail reads 'Tulane University > Cases > Joey Couvillon >'. The main heading is 'Case Review Steps'. A purple question mark icon is in the top right corner. The left sidebar contains navigation links: 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. The main content area has a sub-heading 'Case Review Steps' and a paragraph: 'Create sections to help committee members or individual users organize the materials they add as part of the review. The sections you create here will not be visible to the candidate. You can set up specific requirements for the reviewers of the case in the Case Review Steps. For Examples or more guidance, see [Required Documents for Review Steps](#).' Below this is a 'Settings' section with the heading 'Internal case sections will appear:' and two radio buttons: 'Above the candidate packet' (unselected) and 'Below the candidate packet' (selected). The 'Sections' section lists three items: 'Department', 'Dean's Office', and 'Provost Office', each with 'Edit' and 'Delete' buttons. The 'Department' step is expanded to show 'Department Chair (0)' with 'Includes Instructions' and '2 Required Documents'. The 'Dean's Office' step is expanded to show 'Kathleen Moises (kwhite13@tulane.edu)' with 'Includes Instructions' and '1 Required Document'. The 'Provost Office' step is expanded to show 'AA&P Staff (4)' with 'Includes Instructions' and '1 Required Document'. At the bottom of the page are three buttons: 'Continue', 'Previous', and 'Return to Case Summary'. The 'Edit' button for the 'Department' step is highlighted with a red box.

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

The screenshot shows a web interface for managing reviewers. On the left is a navigation menu with categories like 'Faculty Search', 'Positions', 'Templates', 'Administration', 'Reports', and 'Users & Groups'. The main content area is titled 'Reviewers' and shows a section for 'Department Chair' with 'Ad Hoc Committee (0)'. Below this, there are tabs for 'Manage Members', 'Instructions', 'Required Documents', 'Required Forms', and 'Settings'. Under the 'Manage Members' tab, it says 'No Members'. A blue button labeled 'Add Members' is highlighted with a red rectangular box.

Add Members

The 'Add Members' modal window is shown. It has a search bar containing 'ccolli5'. To the right of the search bar are 'Sort By Name' and a 'New' button. Below the search bar is a table with the following data:

First Name	Last Name	Email	
Cortny	Collins	ccolli5@tulane.edu	+ Add

The '+ Add' button in the table is highlighted with a red rectangular box. At the bottom right of the modal is a 'Close' button.

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

Reviewers

The screenshot shows the 'Reviewers' page after adding members. The 'Department Chair' section now shows 'Ad Hoc Committee (2)'. Below this, there are tabs for 'Manage Members', 'Instructions', 'Required Documents', 'Required Forms', and 'Settings'. Under the 'Manage Members' tab, it says '2 Members'. Below this, there are two member cards: 'Cortny Collins' (ccolli5@tulane.edu) and 'Kathleen Moises' (kwhite13@tulane.edu). At the bottom left of the modal is an 'Add Members' button. At the bottom of the page, a blue button labeled 'Return to Case Review Steps' is highlighted with a red rectangular box.


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

Tulane University > Cases > Joey Couvillon >


Case Review Steps

[+ Add Step](#) [Additional Options](#) ▼


1 Department (Current Step) [Edit](#) | [Delete](#)

 Department Chair (2)
✔ Includes Instructions 2 Required Documents

2 Dean's Office [Edit](#) | [Delete](#)

 Kathleen Moises (kwhite13@tulane.edu)
✔ Includes Instructions 1 Required Document

3 Provost Office [Edit](#) | [Delete](#)

 AA&P Staff (4)
✔ Includes Instructions 1 Required Document

[Continue](#) [Previous](#) [Return to Case Summary](#)

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

Tulane University Kathleen Moises ▼

Tulane University > Cases > Joey Couvillon >

Case Summary

[← Return to Case](#)

Case Information [Edit](#)

Type	Name
Appointment	Joey Couvillon

Creating a Case

- 1 Case Information

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”

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

My Tasks 11

11 Unread Tasks

0 Read Tasks

Search

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	

[View all](#)

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

Home
Your Packets
Faculty 180
Announcements & Help
Account Access
Administration
Faculty Search
Positions
Templates

My Tasks 11

11 Unread Tasks

0 Read Tasks

Title	Due Date
Joey Couvillon Academic Affairs Test Environment Appointment Appointment to Emeritus/Emerita Status - Department	

Step 18a: Select "Case Details"

Note: This will have a number "2" next to it representing the two documents you will be required to upload.

The screenshot shows the Tulane University system interface for a case titled "Joey Couvillon". The user is Kathleen Moises. The interface includes a navigation menu on the left with options like Home, Your Packets, Faculty 180, Announcements & Help, Account Access, Administration, Faculty Search, Positions, Templates, Administration, Reports, Users & Groups, Review, Promotion and Tenure, and Cases. The main content area shows the case details for "Joey Couvillon", including Unit (Academic Affairs Test Environment), Template (Appointment to Emeritus/Emerita Status - Department), and Status (Select Status). The "Case Materials" tab is active, and the "Case Details" sub-tab is highlighted with a red box and a "2" next to it. Below the tabs is a search bar for case materials by title. A blue bar contains actions: Expand All, Collapse All, Download, Share, Settings, and Move. The "Candidate Packet" section is visible, with a description: "Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit."

Step 18b: Upload the candidate's most current CV and Resignation Letter.

The screenshot shows the "Required Items" section of the Tulane University system interface. The left navigation menu is the same as in the previous screenshot. The "Required Items" section is expanded, showing a list of items that must be completed before the case can advance to the next step. The items are "Candidate's CV" and "Candidate's Resignation Letter". Each item has an "Add" button next to it, which is highlighted with a red box. A "2 missing" badge is visible in the top right corner of the "Required Items" section. The description for the required items states: "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." Below each item name is a text box indicating "No files have been added to this section."

Step 18c: 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.

The screenshot shows a web interface for managing a case. At the top, there is a green header bar. Below it, the breadcrumb navigation reads "Tulane University > Cases >". The main title of the case is "Joey Couvillon". To the right of the title, there is a "Send Case" button with a dropdown arrow, which is highlighted with a red box. The dropdown menu is open, showing the option "Forward to Dean's Office". To the right of the dropdown is a "Case Options" button with a dropdown arrow. Below the title, there are several sections: "Unit" (Academic Affairs Test Environment), "Template" (Appointment to Emeritus/Emerita Status - Select Status), and "Reviewing as" (Department Chair). There are also tabs for "Case Materials" and "Case Details" (with a '2' in a blue circle). On the left side, there are partial labels "s & Help" and "s".

Finished