
INTERFOLIO, RPT:

SUBMITTING
OFFER LETTERS
FOR REVIEW

(DEPARTMENT
ADMINISTRATORS)

A Step-by-Step Guide

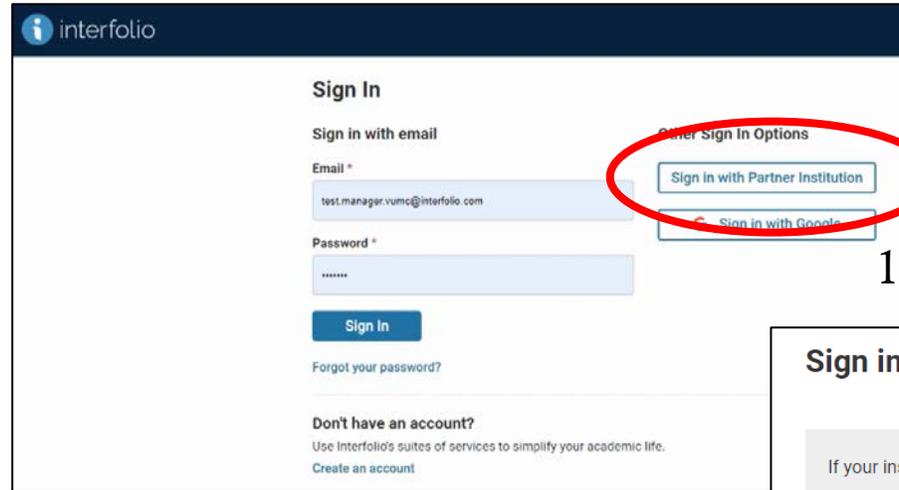
*forward*view
Review, Promotion & Tenure

LOGGING IN

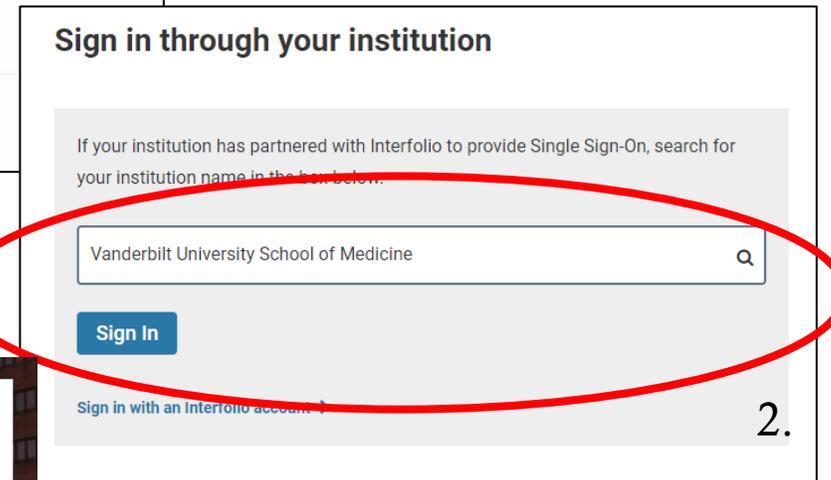
1. To login you will [CLICK HERE](#) & click “Sign in with Partner Institution.”
2. Search for Vanderbilt University School of Medicine and click 
3. Choose your vumc.org email for single sign-on

OR

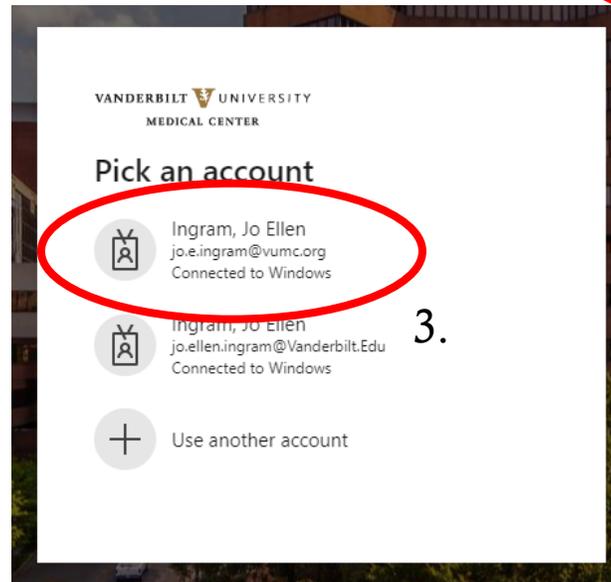
You can also use the single sign-on method by [CLICKING HERE](#) and choosing your @vumc.org email address.



The screenshot shows the Interfolio 'Sign In' page. It has a dark blue header with the Interfolio logo. Below the header, there's a 'Sign In' section with a 'Sign in with email' heading. There are input fields for 'Email *' (containing 'test.manager.vumc@interfolio.com') and 'Password *'. A blue 'Sign In' button is below these fields. To the right, under 'Other Sign In Options', there are two buttons: 'Sign in with Partner Institution' and 'Sign in with Google'. Both buttons are circled in red. A '1.' is placed to the right of the buttons.



The screenshot shows the 'Sign in through your institution' page. It has a light gray background. At the top, it says 'Sign in through your institution'. Below that, there's a text prompt: 'If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.' There is a search input field containing 'Vanderbilt University School of Medicine' and a magnifying glass icon. Below the search field is a blue 'Sign In' button. At the bottom, there's a link 'Sign in with an Interfolio account'. A red oval circles the search field and the 'Sign In' button. A '2.' is placed to the right of the page.

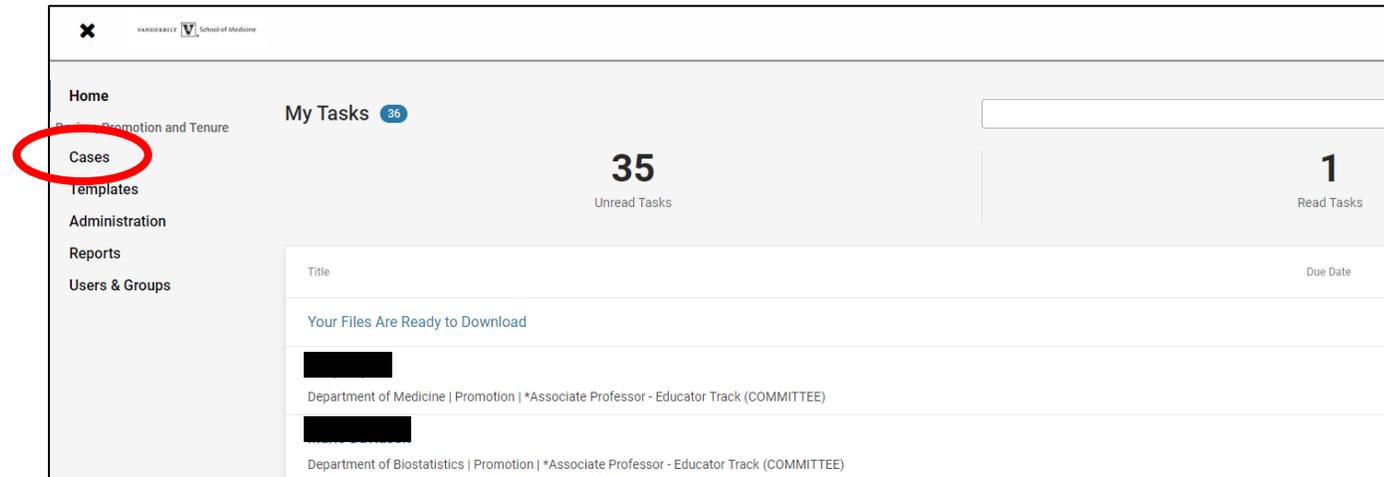


The screenshot shows the 'Vanderbilt University Medical Center' account selection page. It has a white background with the Vanderbilt University Medical Center logo at the top. Below the logo, it says 'Pick an account'. There are three options, each with a circular icon containing a 'V' and a person silhouette. The first option is 'Ingram, Jo Ellen' with email 'jo.e.ingram@vumc.org' and 'Connected to Windows'. This option is circled in red. The second option is 'Ingram, Jo Ellen' with email 'jo.ellen.ingram@Vanderbilt.Edu' and 'Connected to Windows'. The third option is 'Use another account' with a plus sign icon. A '3.' is placed to the right of the page.

HOMEPAGE

This will then bring you to your homepage where you will see any cases you have opened and are active.

You will then want to navigate to your “Cases” Tab on the left-hand side of the screen to begin the process of “Creating a Case” and submitting the offer letter for review.





Cases

Create Case

Home

Review, Promotion and Tenure

Cases

1. Click "Cases"

Users & Groups

Search cases

1 of 1 cases

Name

Test Candida

Department of Bio

Step 2 of 12: FAPC

Add New Case

Selected Candidate *

OLU Offer Letter User
offerletter.user@vumc.org

[Change selected candidate](#)

3. Search &
Choose Candidate
from List

Will the candidate be involved in this evaluation? *

This setting cannot be changed after this step. [Learn more about candidate involvement.](#)

Yes, the candidate will be involved during the case.

No

4. Click "Yes"

Unit for Case *

Please select an organizational unit for this case.

Department of Anesthesiology

5. Choose your department

Confirm

Cancel

6. Click "Confirm"

2. Click "Create Case"

CREATING YOUR CASE

CHOOSING THE TEMPLATE

- Scroll through the templates until you find the ones that begin with “Offer Letter”
- Click on the one that is right for your use case.

The screenshot displays the Vanderbilt University School of Medicine website interface. On the left, a navigation menu includes: Home, Review, Promotion and Tenure, Cases, Templates, Administration, Reports, and Users & Groups. The main content area lists several templates, each with a document icon, a title, a description, and a 'Preview' link. The templates are:

- *Professor - Investigator Track (COMMITTEE) - Investigator Track Promotion to Professor
- *Associate Professor - Educator Track (COMMITTEE) - Educator Track Promotion to Associate Professor
- *Professor - Educator Track (COMMITTEE) - Educator Track Promotion to Professor
- *Associate Professor of Clinical - Clinical Practice Track (COMMITTEE) - Clinical Practice Track Promotion to Associate Professor of Clinical
- *Professor of Clinical - Clinical Practice Track (COMMITTEE) - Clinical Practice Track Promotion to Professor of Clinical
- Offer Letter - Persons under Professional Service Agreement (OLA / Raiford / Moore) - Use this template for review of Professional Service Agreement (PSA)
- Offer Letter - Appointment of Faculty Physicians (Penn / Moore) - Use this template for offer letter reviews that include requests for physicians to be appointed to the faculty, regardless of track.
- Offer Letter - Research Track vs. Staff Scientist Appointment (Penn / Pietenpol / Moore) - Use this template for offer letter appointments on the research track
- Offer Letter - Non-Physician VMG members [e.g., Prof Staff w/ Privileges] - (Raiford / Moore) - Use this template for offer letter reviews for all VMG members who are not physicians.
- Offer Letter - Exclusively NON-Campus Clinical Practice (Raiford / Moore) - Use this template for offer letter reviews for non-faculty, VMG Physicians

A red box highlights the 'Offer Letter' templates. At the bottom of the page, there is a pagination control with buttons for 'First', 'Previous', '1', '2', '3', 'Next', and 'Last'. The number '2' is highlighted in blue, and a red arrow points to it. The footer includes the text: © 2022 Interfolio, Inc. Program Policies.

CLICK THROUGH PRE-MADE TEMPLATE

1.

Vanderbilt University School of Medicine > Cases > Offer Letter User >

Case Information

Type *

Other

Candidate Information

Candidate

OLU Offer Letter User
offerletter.user@vumc.org

Will the candidate be involved in this evaluation?
Yes, the candidate will be involved during their case.

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.

[Add Case Data Form](#)

Save & Continue Return to Case Summary

2.

Vanderbilt University School of Medicine > Cases > Offer Letter User >

Candidate Requirements

Candidate Packet Settings

Packet Deadline Type
The deadline type displayed below is set by an Administrator and applies to all cases across the institution. A deadline type can be selected on the Template level and applied to the case that uses the template.

Soft Deadline
Candidates can submit packets after the deadline.

Select Packet Due Date

Candidate Packet Section Settings
Allow candidates to add their own sections to the packet.

Allow candidates to add their own sections.
 Don't allow candidates to add their own sections.

Candidate Instructions
Add instructions to the candidate about assembling their packet, procedures, policies, or deadlines at your institution. You can also include links to required forms and online resources.

0/1000 characters

Packet Requirements

Create packet sections for materials you would like to receive from a candidate. Each section can contain a due date, a description, and requirements for particular materials (e.g., CV, teaching statement, syllabi).

Candidate Documents

Documents	Requirements
Offer Letter	1 required
Additional Documentation	up to 1 optional

Continue Previous Return to Case Summary

3.

Vanderbilt University School of Medicine > Cases > Offer Letter User >

Internal Case Sections

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](#).

Settings

Internal case sections will appear:

Above the candidate packet
 Below the candidate packet

Sections

Departmental Documentation for Submission in use	Edit Remove
This section will contain information provided by the Department that are required documents for the proposed nomination, but are not part of the candidate's dossier.	
Committee Documents in use	Edit Remove
External Evaluations special section	Learn More Remove

Add Section

Continue Previous Return to Case Summary

ADD YOURSELF & OTHERS TO REVIEW STEPS

Case Review Steps

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

1 Department Administrator Review & Send to OFA [Edit](#) [Delete](#)

Academic Level: [VUMC](#) [Departments](#)

Department Admin (0)

Includes Instructions No Required Documents 1 Required Form

Creating a Case

- Case Information
- Candidate Requirements
- Internal Case Sections
- Case Review Steps
- Case Summary

3 Department Receives Final Letter [Edit](#) [Delete](#)

Academic Level: [VUMC](#) [Departments](#)

Department Administrator (0)

No Instructions No Required Documents No Required Forms

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

Edit Details

Step Details (Step 1 of 3)

Step Name: Department Administrator Review & Send to OFA

Due Date: -

[Edit Step Details](#)

Academic Level: Academic levels manage which administrators and case managers have access at this step.

[VUMC](#) [Departments](#)

[MANAGE ACADEMIC LEVELS](#)

Reviewers

[+ Add Committee](#)

Department Admin (Ad Hoc Committee (0)) [Options](#)

[Manage Members](#) [Instructions](#) [Required Documents](#) [Required Forms](#) [Settings](#)

No Members

[Add Members](#)

[Return to Case Review Steps](#)

Add Members

Search: joey [Sort By Name](#) [New](#)

First Name	Last Name	Email	
Joey	Ingram	jo.e.ingram@vumc.org	+ Add

[Close](#)

Reviewers

[+ Add Committee](#)

Department Administrator (Ad Hoc Committee (1)) [Options](#)

[Manage Members](#) [Instructions](#) [Required Documents](#) [Required Forms](#) [Settings](#)

1 Member

Joey Ingram (jo.e.ingram@vumc.org) [★](#)

[Add Members](#)

[Return to Case Review Steps](#)

[Continue](#)

FINISHING UP SETTING UP THE CASE & NEXT STEPS

- Click Return to Case to Upload the Offer Letter and other documents for review
- Click Add File to add the URL to your word Document for the offer letter
- Click Add file for the CV and other documents to upload them in whatever format you prefer (doesn't need to be a URL)

Vanderbilt University School of Medicine > Cases > Offer Letter User

Case Summary

Case Information

Type	Other	Name	Offer Letter User
Unit	Department of Dermatology	Email	offerletter.user@vmc.org

Candidate Requirements

Instructions to the Candidate

Greetings,

Please review the requirements for your specific circumstances. Collect the items and documents necessary for them to move the materials forward for review.

> Candidate Documents

Internal Case Sections

Departmental Documentation for Submission

Committee Documents

External Evaluations

Creating a Case

- 1 Case Information
- 2 Candidate Requirements
- 3 Internal Case Sections

Joey Ingram

Return to Case

Vanderbilt University School of Medicine > Cases > Offer Letter User

Offer Letter User

Unit: Department of Dermatology

Template: Offer Letter - Appointment of Faculty Physicians (Penn / Moore)

Status: Select Status

Send Case Case Options

Case Materials Case Details

Search case materials by title

Expand All Collapse All Download Share Settings Move

Candidate Packet

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.

Candidate Documents Unlocked

Offer Letter 1 required

No files have been submitted.

Curriculum Vitae 1 required

No files have been submitted.

Add File

Add File

Upload Video Webpage

You can include links to webpages in your dossier materials. When a reviewer clicks the link, the webpage will open in a new tab. For more information see the article Link to Webpages in Your Dossier.

Title *

Test Offer Letter

URL *

https://vmc365-my.sharepoint.com/:f/g/personal/jo_e_ingram_vumc_org/Elns8f-wlERGoaMyEGGhuQ8BqOjper

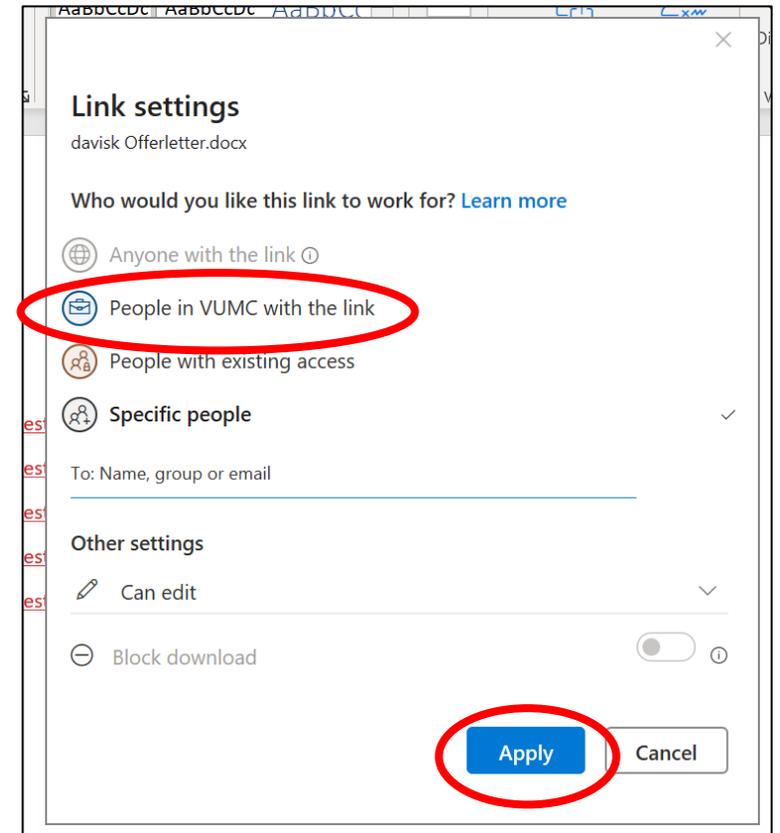
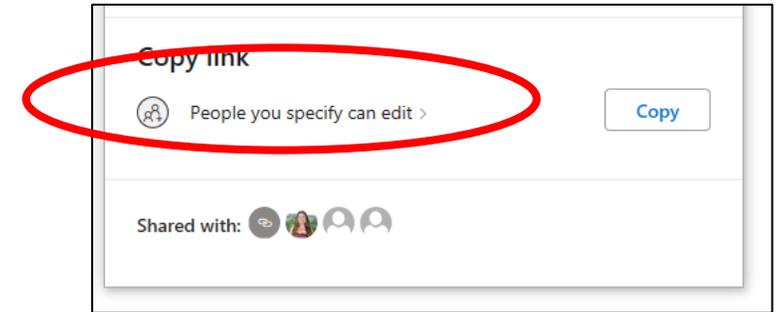
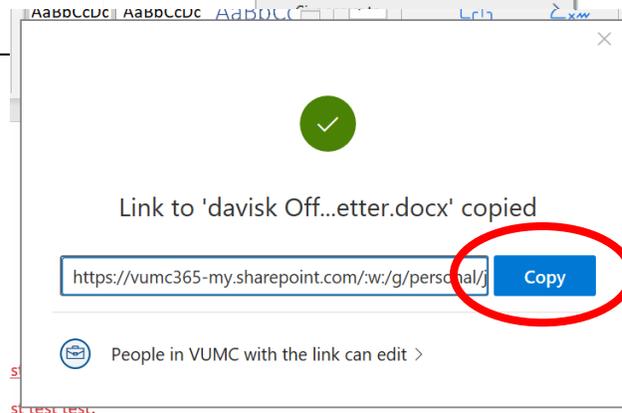
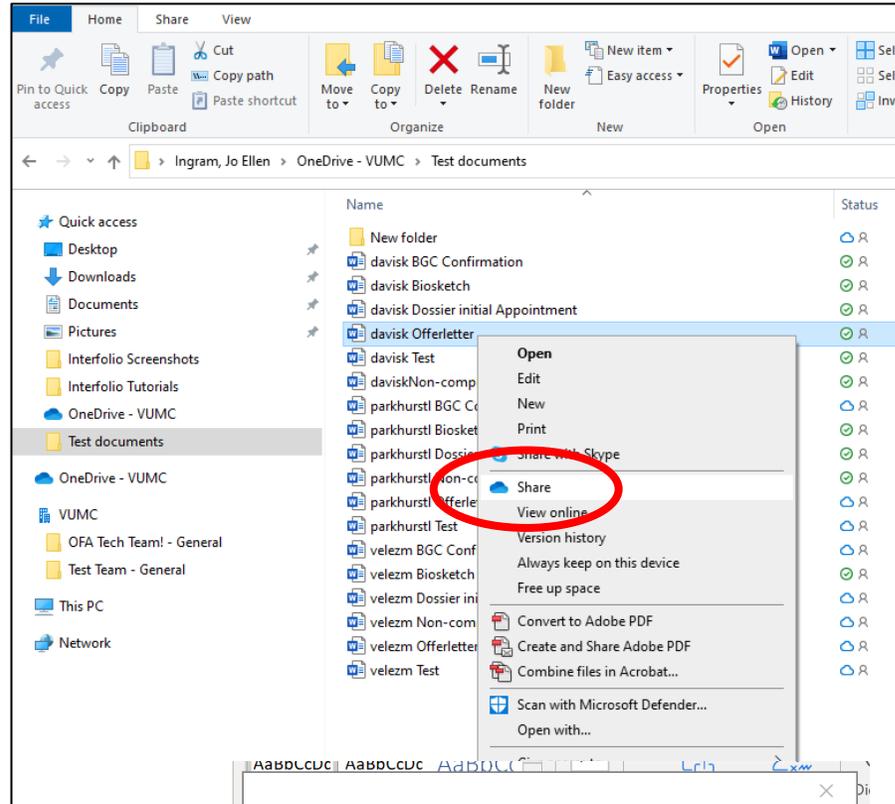
Description

Please see the attached offer letter. This is where any information you need to include will go.

Save Cancel

GETTING URL TO UPLOAD

- Go to OneDrive either online or on your hard drive.
- Find your document & Right Click
- Click Share
- Change “People you specify can edit”
- To “People in VUMC with the link”
- Click to Copy the URL
- Paste the URL into the URL box on the previous slide.



SEND THE CASE FORWARD (TO YOURSELF)

Vanderbilt University School of Medicine > Cases >

Offer Letter User

Unit
Department of Health Policy

Template
Offer Letter - Appointment of Faculty Physician (Moore)

Send Case Case Options

Candidate
Notify Candidates

Forward to
Department Administrator Review & Send to OFA

Case Materials Case Details

Search case materials by title

Read Case

Expand All Collapse All Download Share Settings Move

Candidate Packet

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.

Candidate Documents **Unlocked** Lock

Offer Letter 1 required Add File

Title	Details	Actions
-------	---------	---------

Fill in Subject Line (You will receive a notification in your inbox because you are sending it to yourself.)

Send Case Forward

Great job! You're sending the case forward to the next step, Department Administrator Review & Send to OFA. The following reviewers will lose access to the case:

Case is Being Created | 0 members

The following reviewers will gain access to the case:

Department Admin | 1 members

Send a message to the reviewers gaining access.

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

Subject

Test Offer Letter

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,
Joey Ingram

Preview Continue Cancel

FILL OUT THE OFFER LETTER FORM REGARDING THE CANDIDATE

- Go to the Case you just created
- Click Case Details
- Click “Fill Out Form”
- Enter all required information & Click “Submit Form”

Vanderbilt University School of Medicine > Cases

Search cases

offer letter [Filter]

1 of 1 cases

Name	Type	Template Name
<input type="checkbox"/> Offer Letter User Department of Health Policy	Other	Offer Letter - Appointment of Faculty Physicians (Penn / Moore)

Step 1 of 3: Department Administrator Review & Send to OFA ⚠️ Required Documents

Vanderbilt University School of Medicine > Cases > Offer Letter User

Send Case Case Options

Unit: Department of Health Policy | Template: Offer Letter - Appointment of Faculty Physicians (Penn / Moore) | Status: Select Status

Case Materials | Case Details

Reviewing as: Department Admin

Instructions: During this step, Department Administrators will confirm all required elements for promotion have been provided. Once complete, send case forward to OFA Administrator.

Required Items: All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user. 1 missing

Form Name	Assignee	Actions
Offer Letter Candidate 5 required questions	Committee Managers	View Details
Offer Letter Candidate 5 required questions	Joey Ingram (You)	Fill Out Form

Vanderbilt University School of Medicine > Cases > Offer Letter User > Offer Letter Candidate

Fill out this form to let us know who the Offer Letter is for and what department they will be in.

Last Name *

First Name *

Middle Initial or Name

Department *

BFT Personnel Change Form ID Number *

This is the Budget/Forecast Tool (BFT) personnel change form ID. If this position was not budgeted it will need to be added to Interfolio.

BFT Personnel Change Form ID Number *

This is the Budget/Forecast Tool (BFT) personnel change form ID. If this position was not budgeted it will need to be added to the Forecast tool to create a new ID number, prior to submission in Interfolio.

Is there an approved Executive Funds Flow commitment for this position? (Would only apply to the clinical effort portion of this position.) *

Will be requested at future Executive Funds Flow

Yes, has already been approved by Executive Funds Flow. (Please attach documentation as \"Additional Documents\")

Not Applicable: will not be requesting Executive Funds Flow.

Please provide any supporting information or comments.

Submit Form

SEND THE CASE FORWARD TO THE REVIEWER

Vanderbilt University School of Medicine > Cases >

Offer Letter User

Unit
Department of Health Policy

Template
Offer Letter - Appointment of Faculty Physicians (Penn / Moore)

Forward to
Offer Letter Committee Review

Send Case ▼ Case Options ▼

Case Materials Case Details

Reviewing as
Department Admin

Instructions

Send Case Forward

Great job! You're sending the case forward to the next step, Department Administrator Review & Send to OFA. The following reviewers will lose access to the case:

Case is Being Created | 0 members

The following reviewers will gain access to the case:

Department Admin | 1 members

Send a message to the reviewers gaining access.
If recipients respond to this message, their response will come directly to your email inbox.

Subject *
Test Offer Letter

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,
Joey Ingram

Preview Continue Cancel

Fill in Subject Line and edit any information you would like to in the body of the email and then click "Continue".

ONCE YOU
HAVE SENT
THE CASE
FORWARD YOU
ARE FINISHED,
THEN THE
CASE WILL BE
SENT BACK TO
YOU WITH
NOTES.



Feel free to reach out
with any questions!

Joey Ingram
jo.e.ingram@vumc.org