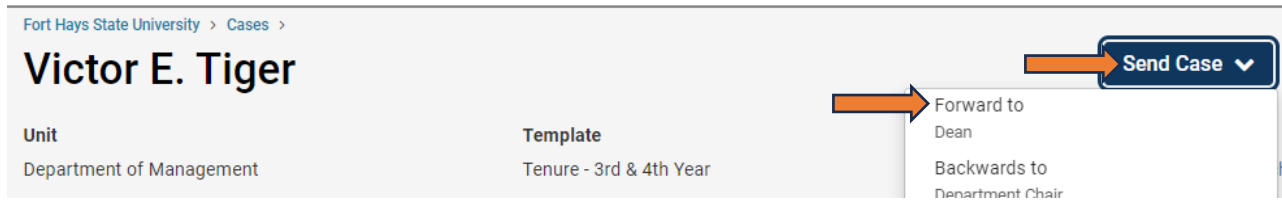


# Sending Case(s) Forward to Next Review Level

Send case forward **after** initial and final letters have been loaded and “shared” with candidate and prior reviewers.

## A. Sending a single case forward:

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



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.

### Send Case Forward

Great job! You're sending the case forward to the next step, Department Chair. The following reviewers will lose access to the case:

- Department Tenure Committee | 1 members
- Department Chair (to receive file) | 1 members

The following reviewers will gain access to the case:

- Department Chair | 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 \***

Department Committee Review Complete

**Message \***

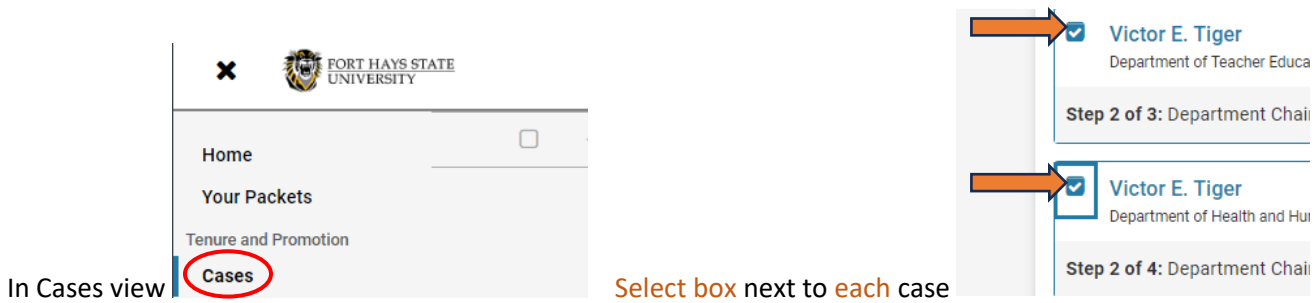
Dear committee members,

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,  
Janet Kohl

**Preview** **Continue** **Cancel**

B. Sending multiple cases simultaneously:



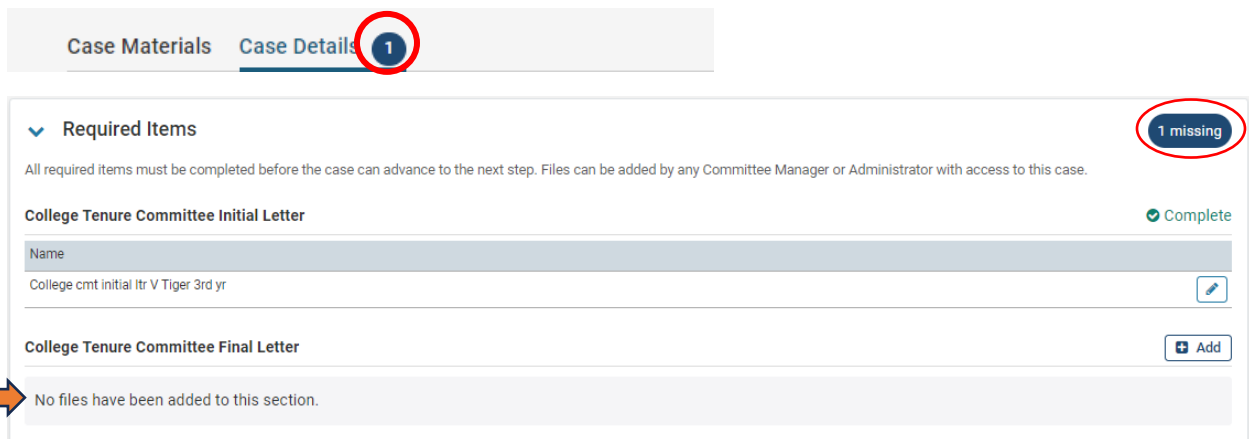
Select **Send Forward** in the top menu bar



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.**

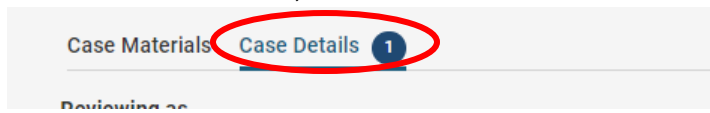


The letter was likely loaded to Case Materials instead of Case Details. See below to add the letter to Case Details.

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.

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>.