



INSTRUCTIONS FOR CREATING A CASE IN INTERFOLIO (RPT MODULE)

1. Go to <https://account.interfolio.com/login>
2. Click sign in with your partner institution

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3. Enter and Select CUNY Queens College

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Sign in through your institution

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cuny

- CUNY Baruch College
- CUNY Hunter College
- CUNY Queens College
- CUNY School of Professional Studies
- CUNY School of Professional Studies DEV

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4. Enter your CAMS account to log in.



QC or CAMS Username (Do not use your CUNY @login.cuny.edu username)

Password

Don't Remember Login

Clear prior granting of permission for release of your information to this service.

Login

[Forgot your password?](#)

[Need Help?](#)

5. Click on Create Case

CUNY Queens College >

Cases

Search cases

6. Click on Select Candidates

Home > Case

Create Cases

ip

1 Select Candidate(s) 2 Select Template 3 Review & Settings

Candidate Information

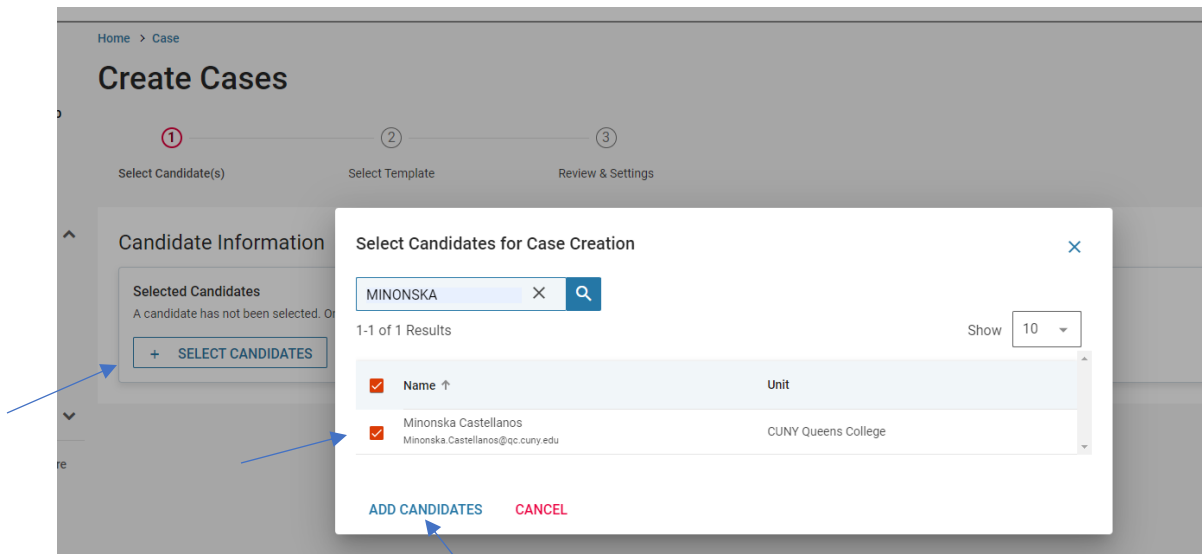
Selected Candidates
A candidate has not been selected. Once you select one or more candidates, the candidate information will display.

+ SELECT CANDIDATES

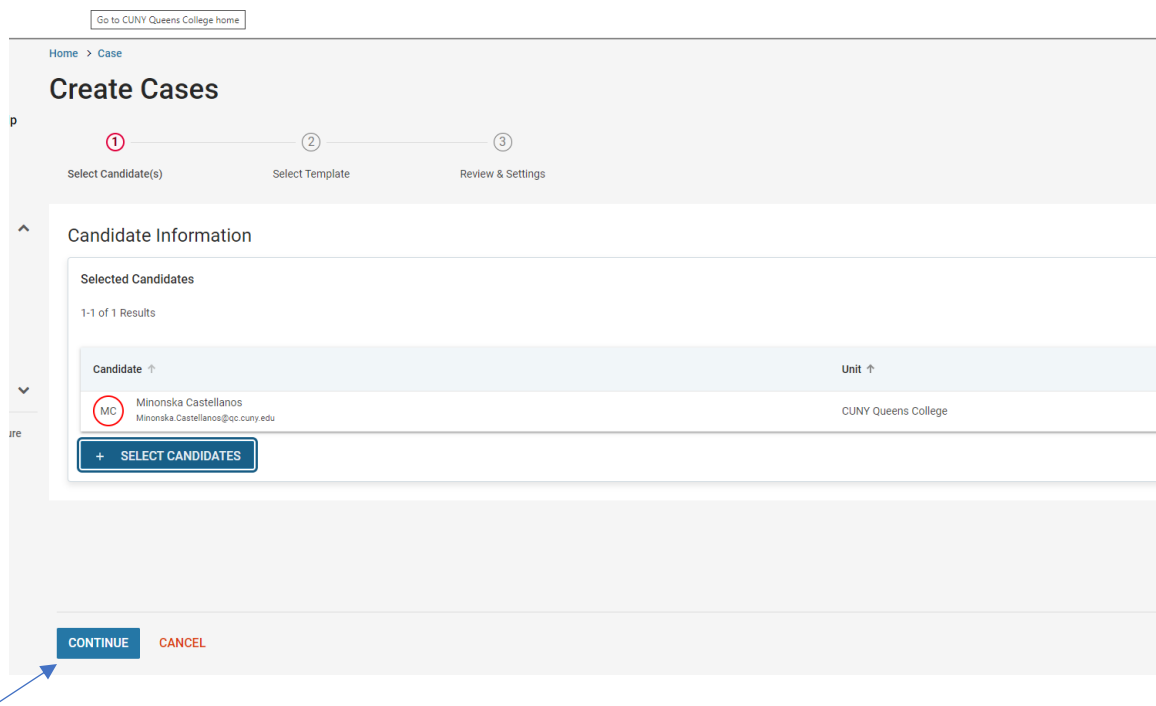
7. Enter Name of the Candidate and click on the search icon



8. Click on Select Candidates
9. Click on the name of the candidate to select the candidate
10. Click on Add Candidates



11. Click Continue



12. Select Unit for Case (s), Type of Case, Template and click Continue

The screenshot shows the 'Create Cases' interface. At the top, there is a breadcrumb 'Home > Case' and a progress indicator with three steps: 'Select Candidate(s)' (completed), 'Select Template' (current step, marked with a red circle), and 'Review & Settings' (pending). The main content area is divided into two sections: 'Select Case Settings' and 'Select Template'. In 'Select Case Settings', there is a dropdown for 'Unit for Case(s) *' with 'Secondary Education & Youth Services' selected, and a dropdown for 'Type' with 'Sabbatical' selected. Below this is the 'Select Template' section, which includes a search bar and a table of templates. The table has columns for 'Template information', 'Unit', and 'Type'. Two templates are listed: 'Custom Case' and 'Application for Half-Year Fellowship Leave Award at 80% Pay'. The second template is selected, indicated by a red dot. The 'Unit' for this template is 'CUNY Queens College' and the 'Type' is 'Sabbatical'. Blue arrows point to the 'Unit for Case(s)' dropdown, the 'Type' dropdown, and the selected template row.

13. On the next page, click on “Edit Candidate Sections”, select the Start Term, Start Year, End Term and End Year to the current term (the term when the leave application is processed or the attached documents from F180 will not show in the Vita).

14. Click Save

The screenshot shows the 'Review & Settings' interface. At the top, there is a breadcrumb 'Home > Case' and a progress indicator with three steps: 'Select Candidate(s)' (completed), 'Select Template' (completed), and 'Review & Settings' (current step, marked with a red circle). The main content area is divided into several sections: 'Case Information', 'Candidate Requirements', 'Candidate Requirements', 'Faculty Activity Reporting Vita', and 'Internal Case Sections'. The 'Case Information' section shows 'Unit for Case(s) *' as 'Secondary Education & Youth Services' and 'Type' as 'Sabbatical'. The 'Template *' section shows 'Application for Half-Year Fellowship Leave Award at 80% Pay'. The 'Faculty Activity Reporting Vita' section shows 'Term Range: Spring 2024 - Fall 2024' and an 'EDIT CANDIDATE SECTIONS' button. The 'Internal Case Sections' section shows 'Case Review Steps' and an 'EDIT STEP DUE DATES' button. A modal window titled 'Edit Candidate Sections' is open on the right. It has a close button (X) in the top right corner. The modal is divided into sections: 'Faculty180 Vita', '(1) CUNY Fellowship Leave Application', and '(2) Fellowship Leave Statement'. The 'Faculty180 Vita' section has fields for 'Vita Name' (Faculty Leaves), 'Unit' (Queens College), and 'Term Range'. The 'Term Range' section has fields for 'Start Term *' (Fall), 'Start Year *' (2024), 'End Term *' (Fall), and 'End Year *' (2024). The '(1) CUNY Fellowship Leave Application' section has a 'Due Date' field with a calendar icon. The '(2) Fellowship Leave Statement' section has a 'Due Date' field with a calendar icon. At the bottom of the modal, there are 'SAVE' and 'CANCEL' buttons. Blue arrows point to the 'Start Term', 'Start Year', 'End Term', and 'End Year' dropdowns, and the 'SAVE' button.

15. Click Yes, the candidate will be involved in this evaluation.
16. Click No, to the question “Would you like to notify the candidates now?”
17. Click Create 1 Case

Settings

Tenure

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

Would you like to notify the candidates now? *

An automatic notification will be sent to the candidate after the case is created with instructions for uploading and submitting materials online.

Yes

No

CREATE 1 CASE PREVIOUS CANCEL

18. The Faculty 180 Vita (as shown below) will say processing. Go back to Cases, open the Case you just created and check that the Faculty Vita show Details as “Generated”.

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.

Title	Details	Actions
<input type="checkbox"/> Faculty180 Vita Fall 2018 · Fall 2019 3 attachments included	Processing	View History Lock Edit

19. Once the case is created FORWARD the case to the next step in RPT.

NOTE: When forwarding the Case for the LEAVE REVISION FORM, the SCHOLAR INCENTIVE AWARDS and ONE-HALF YEAR LEAVE AT FULL PAY select: **Send a message to the reviewers gaining access.**