Step 6: Close or Reopen Case(s)

Individual Case

Unit Administrators and Case Managers can Close Case(s) in Interfolio Review, Promotion & Tenure (RPT) from either the case list or the individual case page of a candidate. When a case reaches the final step, a Close Case button will appear on the Case page. After closing the case a final status or decision will need to be applied to the case. It is also possible to select Close a Case from the More Options menu at the top right of the Case.

Bulk

From the case list, unit administrators or case managers can close more than one case at a time if the cases share the same final status or the same final status is desired to be assigned. **Note** that faculty members can still view/access closed cases.

Individual Case

1. Navigate to the **Cases** page and click the **hyperlinked Name** of the applicable faculty member's case.

UMass Chan Medical School >				✓ Unit
Cases Search cases	Population and Quantitative Health Sciences			
	Q Filter			Include child units
				✔ Туре
1 of 1 cases Filtered By: Population and Quantitative Health S	Sciences X Include child units X	Closed X Active Cases X Reset Filters		Appointment Promotion Reappointment
Name 🗸	Туре 🗢	Template Name 🗢	Status 🖨	Review Sabbatical
Faculty Member 2 Population and Quantitative Health & nuces	Review	2025 PQHS Faculty Annual Performance Review Supervisor	Closed	✓ Status
Step 5 of 5: Academic Administrator				Chair Review
				Closed Faculty Review
				Open
				Supervisor Review
				 Active or Closed
				Active
				Closed

2. Click Close Case from the Case Options dropdown menu.

Mass Chan Medical School > Cases >					
Faculty Member 2			Send Case	e 🗸 🛛 Ca	se Options 🗸
-			Edit Case	9	
Init	Template	Status	Email Ca	ndidate	
opulation and Quantitative Health Sciences	2025 PQHS Faculty Annual Performance Review Supervisor	Closed		rnal Section	
	Supervisor		View Act	ivity Log	
Case Materials Case Details			Close Ca	ise	
earch case materials by title					2
	Q Read Case				-
🔲 🕂 Expand All 🗢 Collapse All			🖂 Share		

Candidate Packet

ny 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 les in an unlocked section before they submit.

Interfolio Step 6 Job Aid: Faculty Annual Performance Review

3. Select a **Status Decision** from the dropdown menu that reflects the final phase of this case before closing.



4) Then click Save button.





If the case is closed, the Reopen Case option will appear.



Interfolio Step 6 Job Aid: Faculty Annual Performance Review

Bulk

- Navigate to the Cases page and select the checkboxes next to the applicable faculty members' cases.
- 2) Click the **Close Cases** button on the toolbar that appears at the top of the page when cases are selected.

Cases			
Search cases		2	
	Q Filter	G	
□ 🖪 Notify Candidates 📢 Send	Backward 🕨 Send Forward	Close Cases fore Options	
3 of 3 cases			
Filtered By: Closed X Active Cases X	Reset Filters		
Name 🚽	Type 🗢	Template Name 🗢	Status 🗢
	Туре 🗢	Template Name 🗢	Status 🗢
Name -	Type ◆ Review	2025 PQHS Faculty Annual Performance Review	Status 🗢
Foculty Member 2 opulation and Quantitative Health Sciences			
F culty Member 2		2025 PQHS Faculty Annual Performance Review	
Foulty Member 2 copulation and Quantitative Health Sciences Step 5 of 5: Academic Administrator hypla Sluss		2025 PQHS Faculty Annual Performance Review	
Coulty Member 2 Opulation and Quantitative Health Sciences Step 5 of 5: Academic Administrator	Review	2025 PQHS Faculty Annual Performance Review Supervisor	Closed
Foulty Member 2 copulation and Quantitative Health Sciences Step 5 of 5: Academic Administrator hypla Sluss	Review	2025 PQHS Faculty Annual Performance Review Supervisor 2025 Faculty Annual Performance Review-	Closed
Foculty Member 2 Spulation and Quantitative Health Sciences Step 5 of 5: Academic Administrator Hyla Sluss ridocrinology & Diabetes	Review	2025 PQHS Faculty Annual Performance Review Supervisor 2025 Faculty Annual Performance Review-	Closed

- 3) Select a Status from the dropdown menu that reflects the final phase of these cases.
- 4) Then click **Save** button.

