Interfolio Quick Reference Card (QRC)

Completing the UCRHSS Grant Process in Interfolio

1.Login

Browsers:

Latest versions of Google Chrome, Mozilla Firefox, Safari, Edge

1. URL - https://account.interfolio.com/sso .
2. Type **Princeton University** under the **Search for your institution** section and click **Sign In.**
3. Enter Princeton login credentials.
4. Click **Login.**

2. Create Case

1. Click **Cases** button, in the left navigation.
2. As a unit administrator you will see all cases in your unit.
3. In the upper right corner click CREATE CASE
4. Search for candidate(s) by name. If you have multiple candidates for the same action, you can search for and select multiple names to create multiple cases.
5. Click CREATE CASE
6. Under section **Units for Case(s)** select the **Unit** dropdown.
   (In the dropdown, you will only see the list of units that you have access to.)
7. Select **Type** dropdown and action for **Other**
8. Scroll down and select the template **UCRHSS Grant- Request for Researtch Assistance.**
9. Click Continue
10. In the **Review & Settings** section, you can set an optional **Soft Deadline** for the candidate requirements. Soft Deadline means the system will allow the candidates to submit packets after the deadline.
11. In **Settings,** review the question: Will the candidate be involved in this evaluation? ⚠This setting cannot be changed after this step.
12. Click CREATE CASE

3. Set up Case Permissions (REQUIRED)

1. In the upper right corner, click the **Case Options** dropdown, select **Edit Case.**
2. Under the **Creating a Case** menu, Click **Case Review Steps.**
3. In the **Academic Unit (academic managers & administrators)** section, click **Edit**
   ⚠This is an important step and should not be skipped.
4. Under Reviews, Click Add Members .
5. Type your name or the name of the member who will be primarily handling the case (completing forms and uploading documents) in the search box. ***Only one person* in your unit who will be working on the case should be added.**
   ⚠This is an important step and should not be skipped.
6. Select the name, and the **+ Add** then **Close.** Note that only the users who have already been added to the system can be selected.
7. The name will display, Click the **Star** icon (so it turns green ★) which will grant the required permissions to complete forms and other requirements. *Only one person* in your unit who will be working on the case should be assigned the star.
   ⚠Ensure that you have the ★ next to your name.
8. Click Return to Case Review Steps.
9. **For the UCRHSS grant process, please ensure you add yourself and assign the green star in both Academic Unit steps—specifically at Step 1 and Step 5 of the Case Review Steps—to grant yourself full management permissions.**
10. Click Continue .
11. Click **Return to Case,** at the top right corner of the screen.

Note: *If the primary case handler changes during the process, remove the existing case handler who has the ★ and add the new member who will be replacing them. Remember to assign the ★*

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4. Send Case Forward to Academic Unit (REQUIRED)

⚠ **It is important that you follow this step because this will enable the you to complete the required documents and forms.**

1. From the drop-down under Send Case click on **Forward to Academic Unit.**
2. A pop-up message will appear. If you uncheck the box, you can forward the case without a message. If you would like to send an email, complete the subject line and modify the pre -populated message.
3. Click Continue to send the case to the Academic Unit.

5.Upload Files

All required items must be completed before the case can advance to the next step.

1. In **Cases**, click the candidate's name.
2. Click **Case Details**.

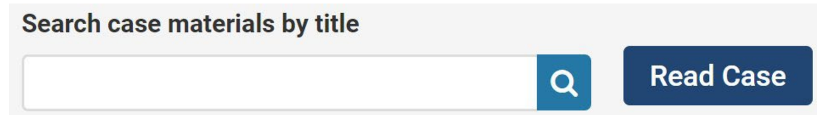
Before uploading the required file, read the instructions under each requirement. Each file needs to be added into the correct section to be considered Complete.

1. To upload a file, click Add browse to the required file, and complete the upload. (Supported File Types: .pdf, .doc, .docx, .xls, .xlsx, .txt, .ppt, .pptx, .html).
2. Once a document's requirements are met, the status changes to ✔ Complete for that item.

*Note: The Case Details section allows you to upload only one document. There may be instances where more than one document needs to be uploaded, in these situations, click **Case Materials** tab, navigate to **Internal Sections** , select the appropriate Internal section and click **Add File** .*

6. Read Case

1. Click **Read Case** under the Case Materials tab and next to the search box to read all materials organized by sections. Verify that all the requirements have been completed.
2. Click the title of a document to open in the document reader.



7. Send Case Forward to ODoF Academic Affairs

The last action is to send the case forward to ODoF Academic Affairs.

1. Click Return to Case if you are in the document reader.
2. To send the case Forward, click Send Case dropdown and select **Forward to ODoF.**
3. Check **Send a message to the reviewers gaining access.**
4. Type a meaningful Subject line using the following format:
   UCRHSS GRANT- 2025-26 - Last Name
   You have the option to edit the default message in the body of the email.
5. At this point the case will show in your Cases list and the Step will be updated.

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8. Case Sent Backwards for Revisions

1. If any revisions are needed, ODoF will send the case back to the Academic Unit.
2. You will receive an email notification with the **subject line Revisions Needed.** ⚠ **Please do not reply to this email address as it is not monitored by the ODoF team reviewing cases.**
3. All the details regarding the revisions will be noted in the body of the email.
4. Make the requested changes and **Send Case** forward to ODoF.

9. View Activity Log

The Activity Log documents every action taken on a case, including email notifications sent through the Interfolio system.

1. Click the Case Options dropdown and select **View Activity Log.**
2. From the log, locate the activity you would like to view. If a message was sent, you can use the **View Content link** to see a copy of that message.

10. View/Manage Case List

1. Click **Cases** on the navigation menu.
2. As a unit administrator with broader visibility, you have access to all cases in your unit regardless of where they are in the process. To find the cases that are require your action, type the step name **Academic Unit (academic managers & administrators)** in the **Search Cases** box.
3. Use the **Filter** button to apply filters and narrow down your search by division, type, or status. Once you've found the case, click on the **candidate's name.**

ADDITIONAL FEATURES

Download Case

1. From the **Case Materials** tab, select the option for **Read Case.**
2. A Download displays at the top of the read screen.
3. Select the **Download** dropdown and choose the relevant option.

Generate and Download Reports

1. Click **Reports** in left side menu.
2. Refer to this link for information on how to generate and dowload reports.

Move Case Materials from One Packet Section to Another

1. Navigate to **Cases** on the navigation menu.
2. Click the Name of the candidate to navigate to the desired case to edit.
3. Select one or more files using the checkboxes under the **Internal Sections.**
4. Click **Move** at the far right-hand side of the blue action bar.
5. Select the new section for the materials to go from the dropdown menu.

Delete a File

1. Locate the file to be deleted.
2. Click the ✎ dropdown located to the right of the file name.
3. Select the **Delete Document** option.
4. When the popup message appears, click Delete Document .