





Mid-Probationary Review using Interfolio

Instructions for the Dean

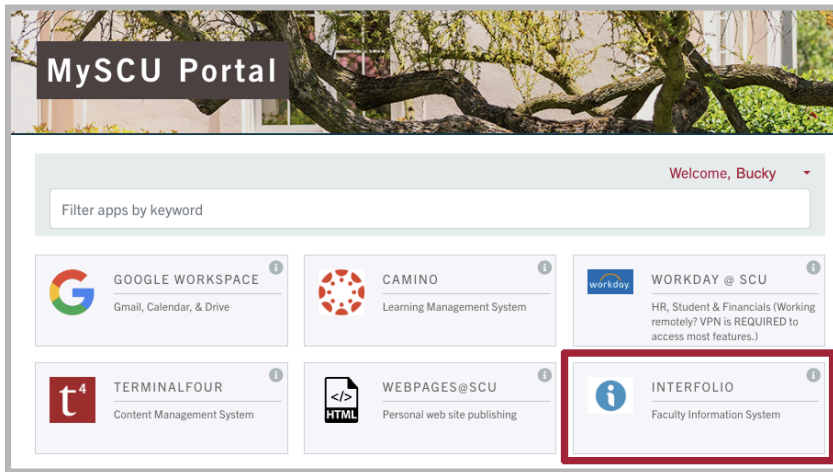
Overview

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STEP 1 - LOGIN TO INTERFOLIO

You can login to Interfolio one of two ways (A or B):

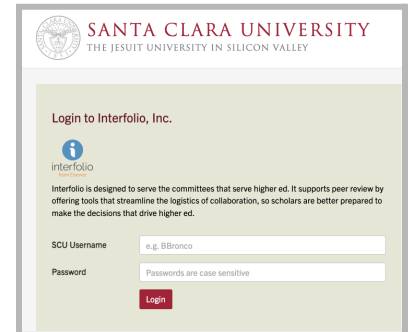
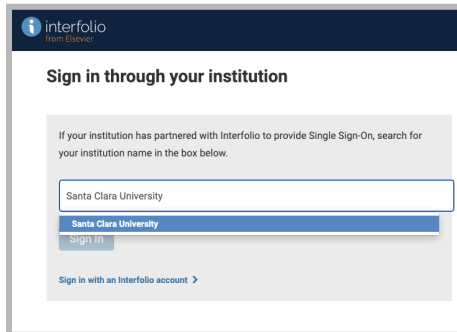
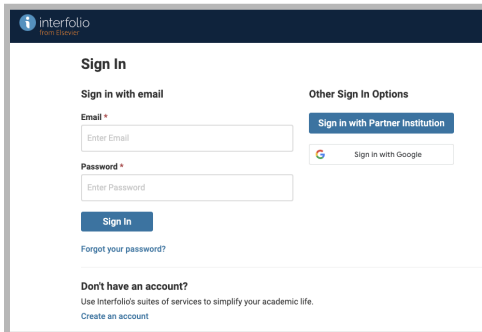
A



Sign into MySCU

Click on the Interfolio tile

B

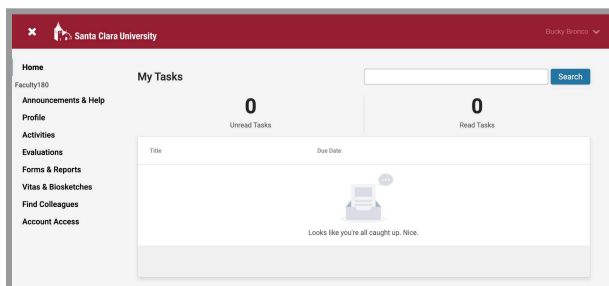


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

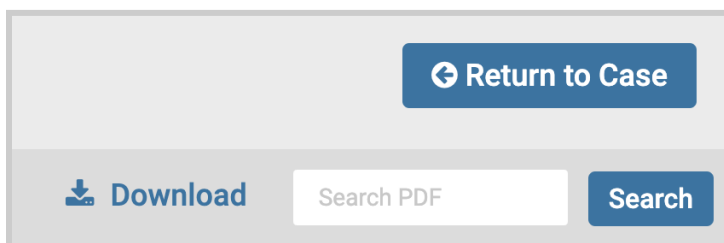
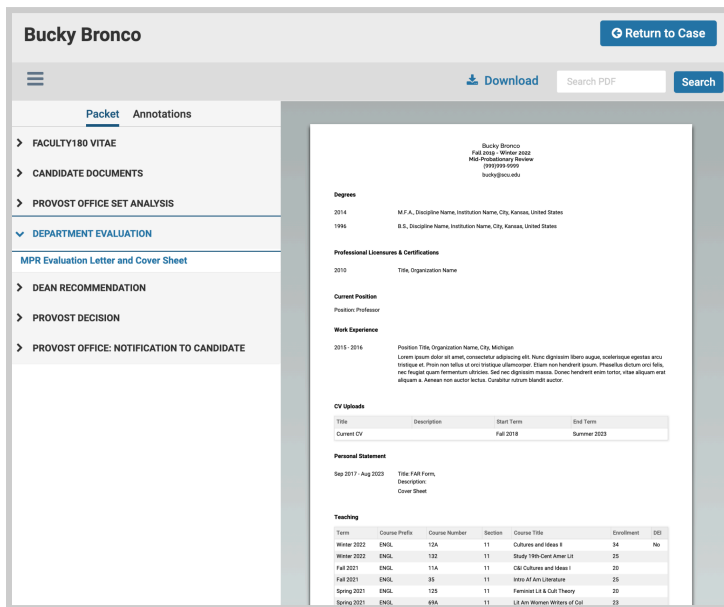
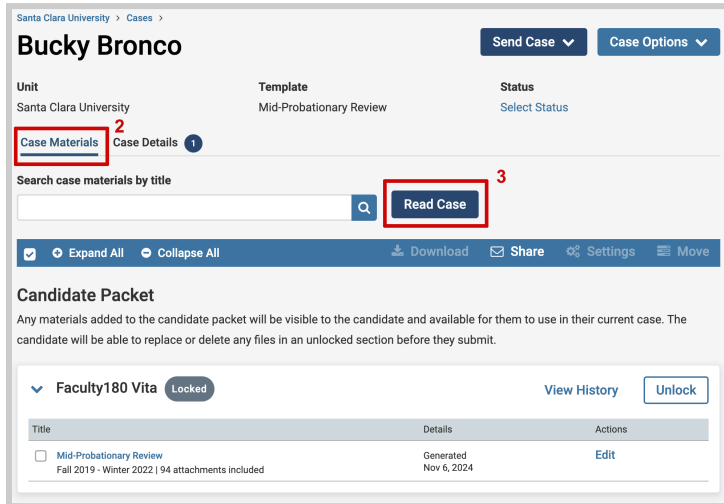
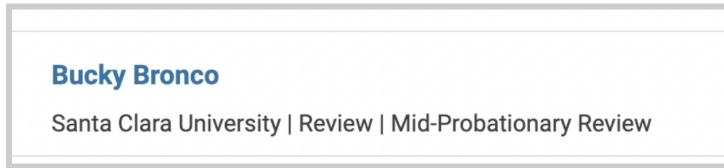
However you login, double-check that you're in the right account:



After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this (there may be cases in the central white window). If your screen doesn't look like this, you may be logged in to another Interfolio account. For troubleshooting support, contact Katie Williams (kfwilliams@scu.edu).

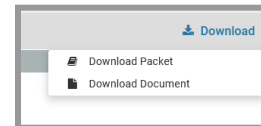
STEP 2 - REVIEW THE CASE

The dean is given access to the candidate's case through Interfolio when it is forwarded from the department. A trigger with the candidate's name will appear on your dashboard:



1. Click on the candidate's name in blue to bring you to the candidate's packet.
2. Select the **Case Materials** tab (upper left) of the candidate packet.
3. Click the dark blue **Read Case** button on the right to review the candidate's packet.
4. The left sidebar lists the sections of the candidate packet. Click on the > (caret) symbol next to any category to expand the section and to view its contents. There will be a section for every activity category for which the candidate has uploaded files.

You can download an individual document, or the entire Faculty-180 Vitae packet, using the blue Download button in the



upper right of the browser window. You will re-

ceive an email when the download has completed.

In addition to the candidate's materials, the sections in the left sidebar include the Provost Office SET Analysis and the Department MPR evaluation letter.

5. To exit the case materials, click the blue **Return to Case** button in the top right.

STEP 3 - UPLOAD THE REQUIRED DOCUMENT

When you have finished reviewing the case and the department's evaluation letter, you will upload your own recommendation letter.

Santa Clara University > Cases >

Bucky Bronco

Unit: Santa Clara University | Template: Mid-Probationary Review | Status: Select Status

Case Materials | **Case Details** 1

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.

Faculty180 Vita Locked View History Unlock

Title	Details	Actions
<input type="checkbox"/> Mid-Probationary Review Fall 2019 - Winter 2022 94 attachments included	Generated Nov 6, 2024	Edit

1. Click the **Case Details** tab at the upper left. The blue badge to the right of the Case Details tab indicates the number of outstanding required elements needed before the case is forwarded to the Provost. For this process, there is one required document: the Dean Recommendation.

Santa Clara University > Cases >

Bucky Bronco

Unit: Santa Clara University | Template: Mid-Probationary Review | Status: Select Status

Case Materials | **Case Details** 1

Reviewing as
Dean

Instructions

Required Items

1 missing

All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case.

Dean Recommendation Add

The dean will review the materials provided by the department. If the dean agrees with the department's recommendation, the dean submits a written recommendation to the Provost in Interfolio. In the rare case where the dean is considering a decision different from the recommendation of the department, the dean will discuss the case with the department chair and other participating tenured faculty members before submitting a written recommendation to the Provost. In the rare case where the Provost is considering a decision different from the recommendation of either the dean or the department, the Provost shall meet with the department chair, participating tenured faculty members, and the dean to discuss the case. The Provost will render the final decision regarding retention and shall notify the candidate of the decision in writing.

No files have been added to this section.

2. Click on the **Add** button to upload the letter. A pop-up window will allow you to browse your computer for the letter.

Add Dean Recommendation ×

Upload a new file | Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

Name *
Bronco MPR Recommendation

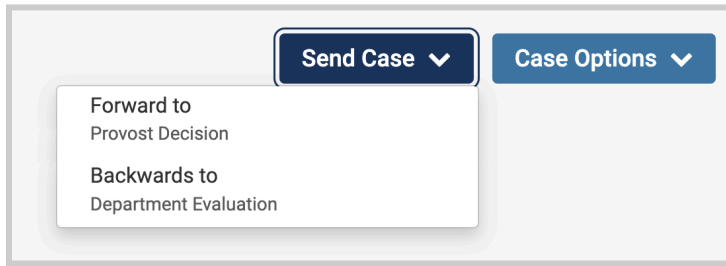
Section *
✓ Provost Office SET Analysis
Department Evaluation
Dean Recommendation
Provost Decision
Provost Office: Notification to Candidate

Add Cancel

3. After uploading the letter from your computer, this screen will pop-up. In the Section field, select "Dean Recommendation." Then click the blue **Add** button (bottom right) to submit.

STEP 4 - SEND CASE FORWARD

After adding your recommendation, you will send the case forward to the Provost.



1. Click on the dark blue **Send Case** button in the upper right corner to move the case to Provost.

A screenshot of a 'Send Case Forward' dialog box. The title bar says 'Send Case Forward' with a close button. The main text reads: 'Great job! You're sending the case forward to the next step, Provost Decision. The following reviewers will lose access to the case: Dean | 1 members'. Below this, it says 'The following reviewers will gain access to the case: Provost | 3 members'. There is a checked checkbox for 'Send a message to the reviewers gaining access.' with a note: 'If recipients respond to this message, their response will come directly to your email inbox.' There is a 'Subject *' field with the placeholder text 'Message Subject'. Below that is a 'Message *' field with a rich text editor toolbar and the following text: '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, Catherine Murphy'. At the bottom, there are three buttons: 'Preview', 'Continue', and 'Cancel'.

2. An option to notify the Provost with an email pops-up. You can uncheck the “Send a message” box; the Provost will see the case in their dashboard, regardless. But if you choose to notify them, the blue Continue button will be inactive (faded) until you fill in the email Subject field. After filling in the Subject, edit your message if you wish and click the now active/blue **Continue** button.

A green pop-up message will appear briefly in the lower left of your screen to indicate that you have completed the submission.