Promotion to Teaching Professor using Interfolio

Instructions for the Dean

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STEP 1 - LOGIN TO INTERFOLIO

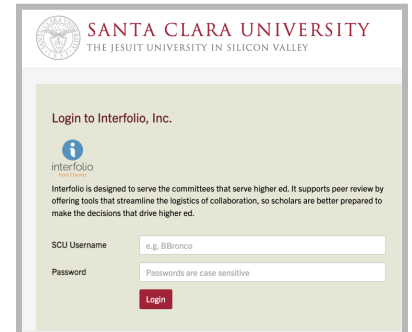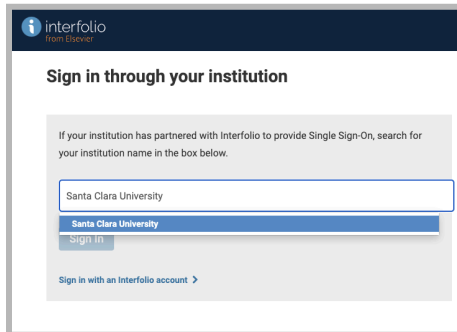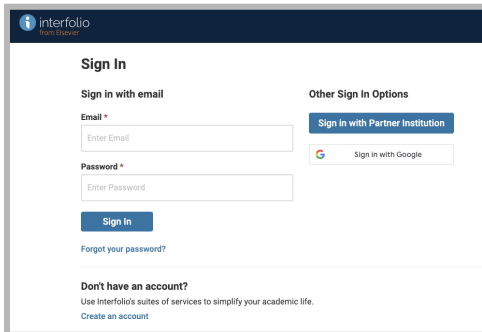**You can login to Interfolio one of two ways (A or B):**

A
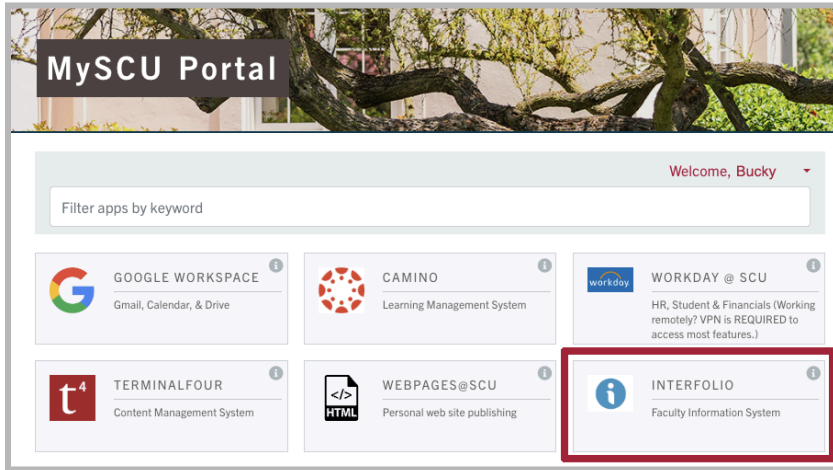
Sign into MySCU

Click on the Interfolio tile
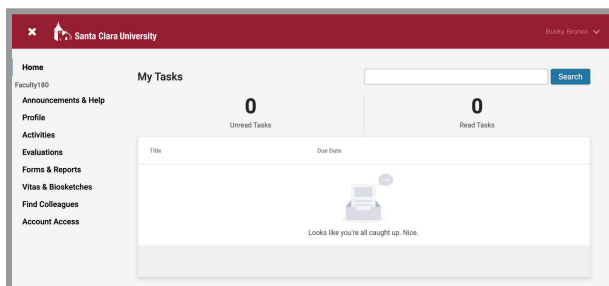
B

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).
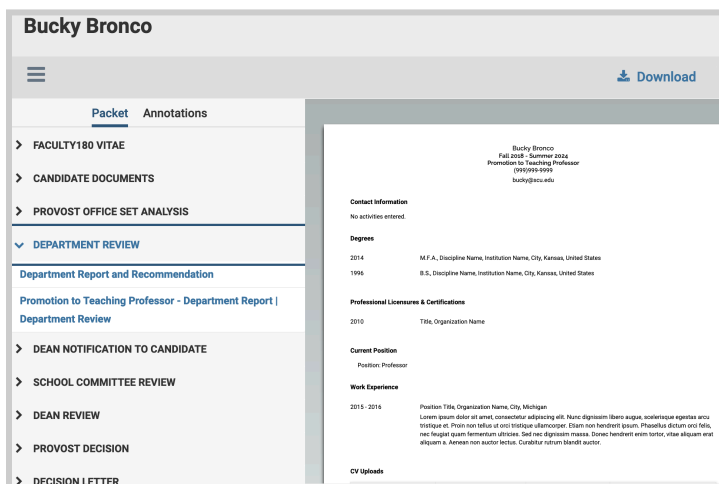
STEP 2 - REVIEW THE DEPARTMENT RECOMMENDATION

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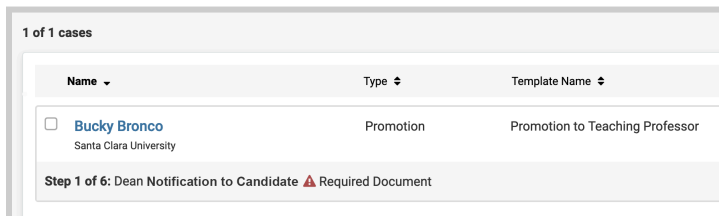
1. Click on the candidate's name in blue to bring you to the candidate's packet.

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.
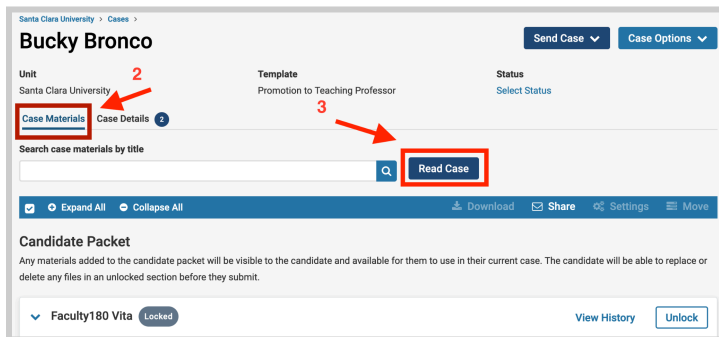
4. The left sidebar lists the sections of the candidate packet. You have access to these materials now, and will review them at a later stage. But at this stage, the only thing you need to review is the Department Report and Recommendation.

5. The left sidebar lists the sections of the candidate packet. Click on the › (caret) symbol next to Department Review to expand the section and view the contents. Click on the Department Report and Recommendation. You'll see the document in the main window on the right.
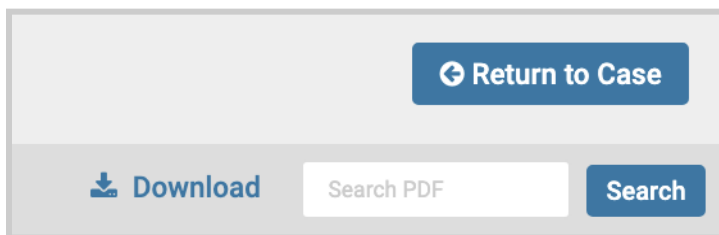
6. To exit the case materials, click the blue **Return to Case** button in the top right.

STEP 3 - NOTIFY CANDIDATE & UPLOAD NOTIFICATION
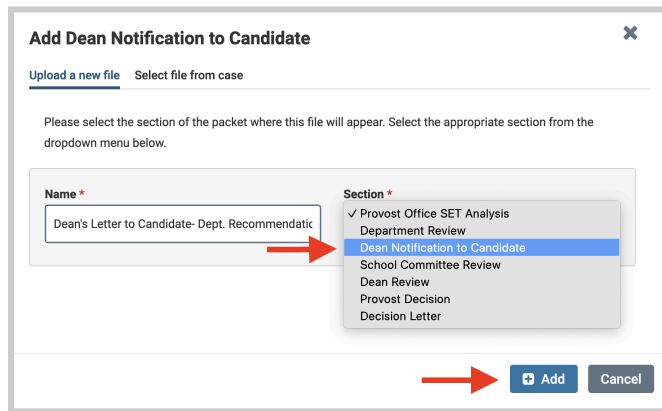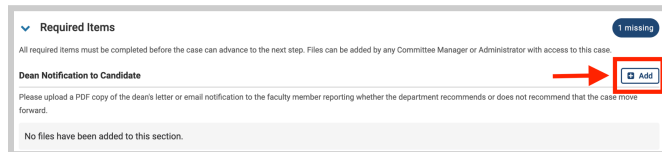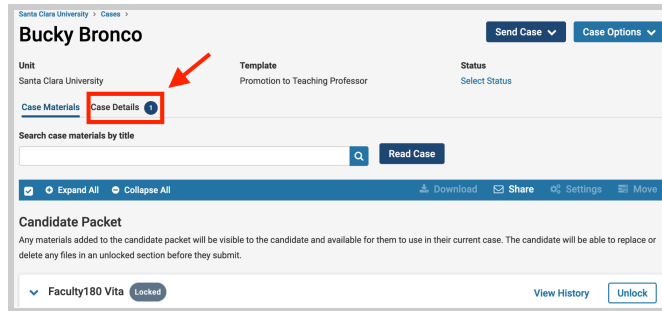
1. Send a letter or email notification of the decision to the candidate. Create a PDF of it on your computer.

2. Click the **Case Details** tab at the upper left. This section will reveal the dean's required item: Dean Notification to Candidate.

3. Click on the **Add** button at the required document to upload the file. A pop-up window will allow you to browse your computer for the document.

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

5. If the department did not recommend promotion, please email Katie Williams outside of Interfolio and request that she suspend the case (kfwilliams@scu.edu).

STEP 4 - SEND CASE FORWARD
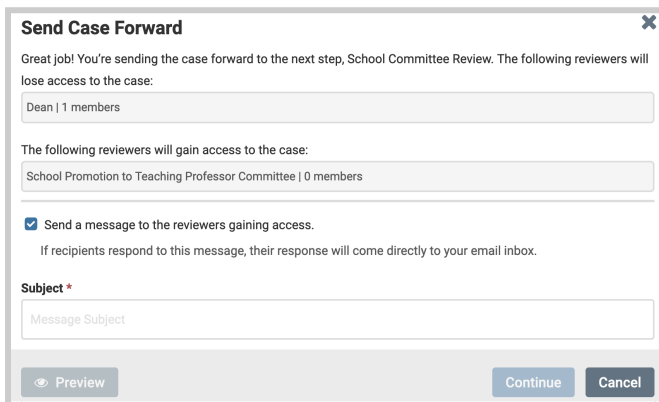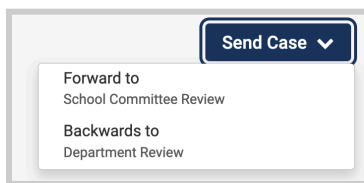
1. If the department decision is positive, click on the dark blue **Send Case** button in the upper right corner to move the case to the School Committee.

2. 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.

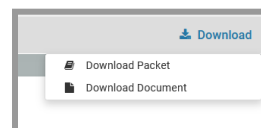   You have completed the initial steps.

STEP 5 - REVIEW THE CASE

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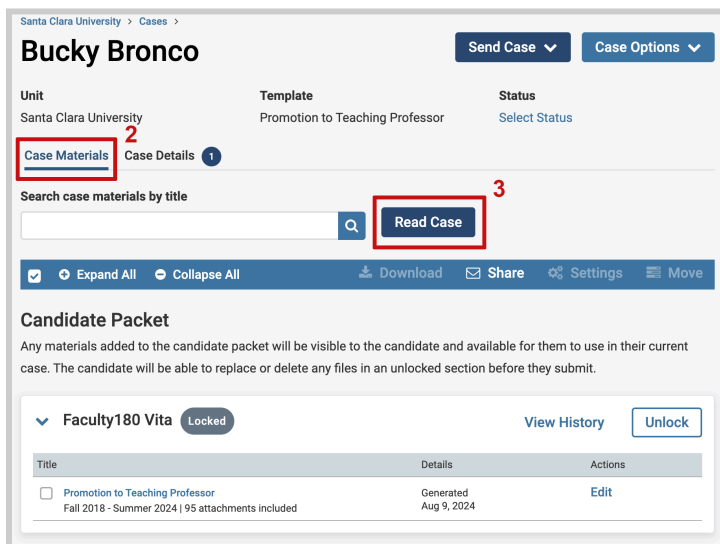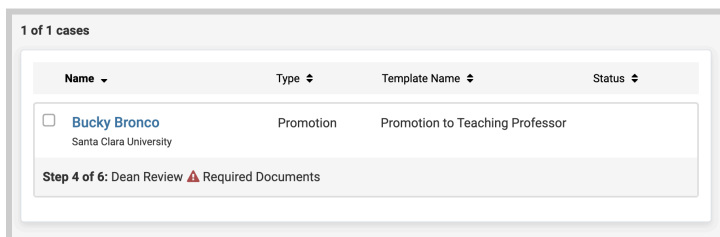

1. Click on the candidate's name in blue to bring you to the candidate's packet.

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 receive an email when the download has completed.
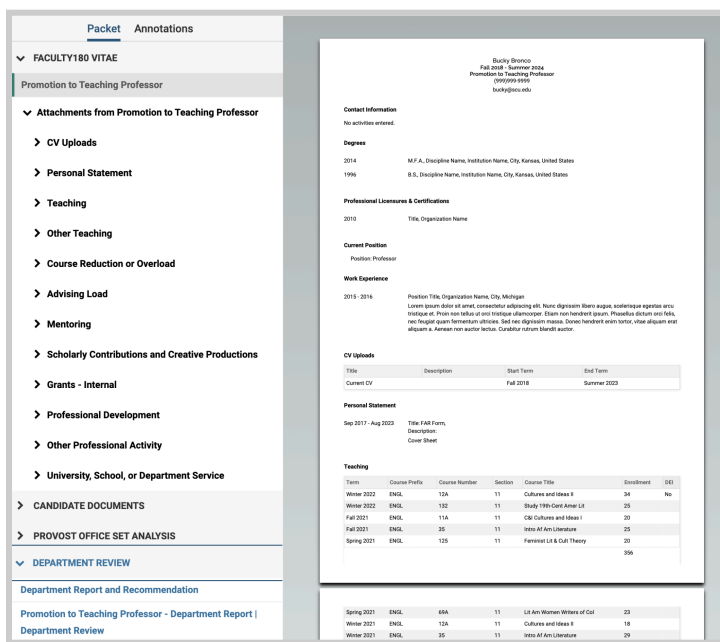
   In addition to the candidate's materials, the sections in the left sidebar include the Provost Office SET Analysis and the Department and School Committee reviews The SET Analysis provides a summary of course SET report averages with comparison to department and school averages for the period under review, excepting the initial online quarters during COVID (Winter and Spring 2020).
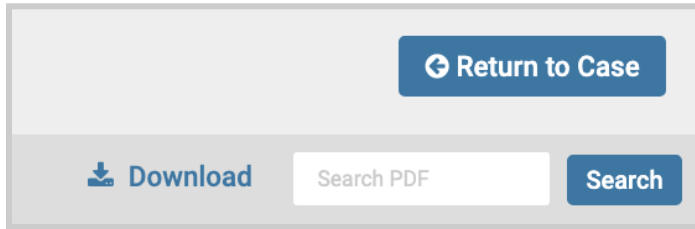
5. To exit the case materials, click the blue **Return to Case** button in the top right.

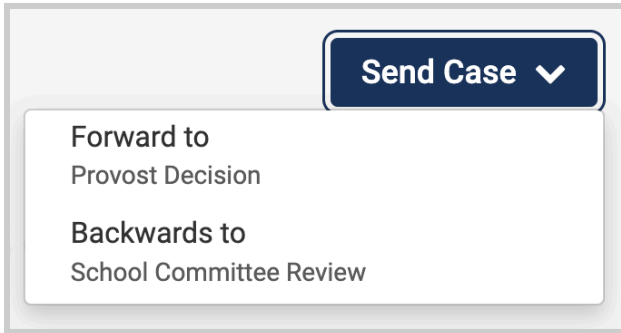# STEP 6 - COMPLETE THE REQUIRED FORM

Rather than uploading a file, you will complete a form indicating your recommendation. You may wish to begin from a file that you can retain for your records, and paste your comments into the comment field.
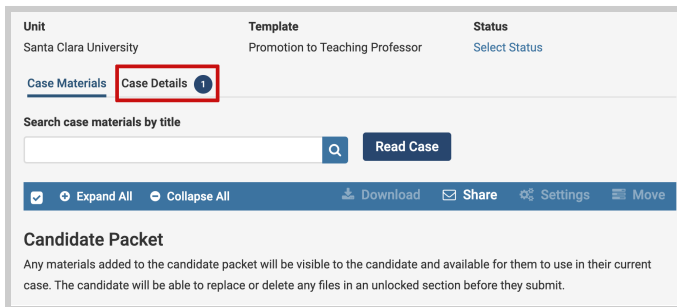
1. Click the **Case Details** tab at the upper left. This section will reveal the dean's required form: Promotion to Teaching Professor - Dean Recommendation.
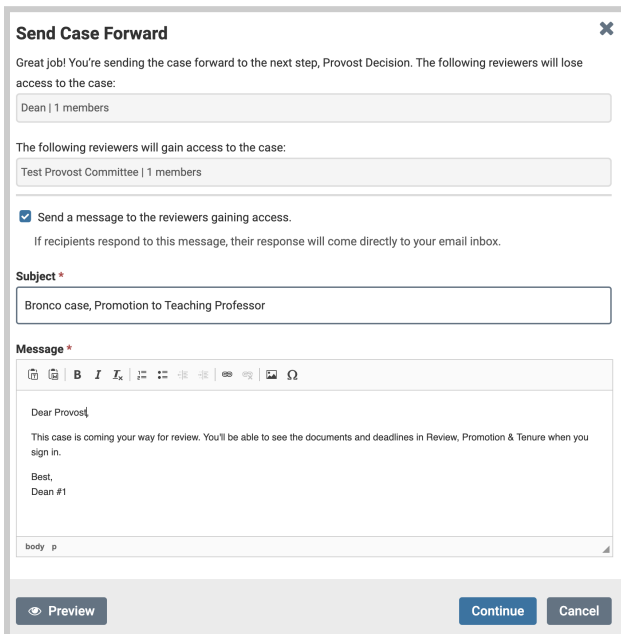

2. Click on the **Fill Out Form** link. Complete the form:
   a. Select your recommendation.
   b. Type or paste in your comments.
   c. Save your responses. This takes you to the prior screen; click "Fill Out Form" to return to this screen to submit the form.
   d. Submit the form.

STEP 7 - SEND CASE FORWARD

Click on the dark blue **Send Case** button in the upper right corner to forward the case to the Provost Decision step.

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.

You have completed the submission.