





Promotion to Teaching Professor using Interfolio

Instructions for the Provost

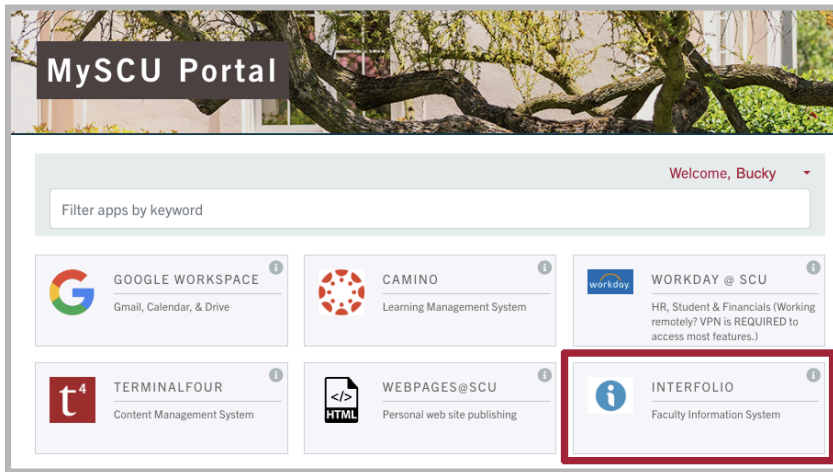
Overview

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STEP 1 - LOGIN TO INTERFOLIO

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

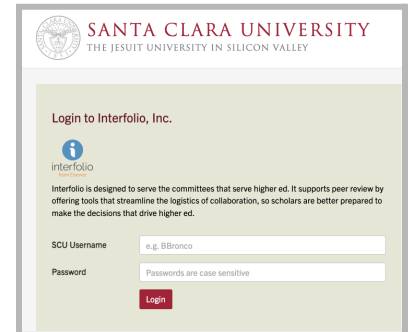
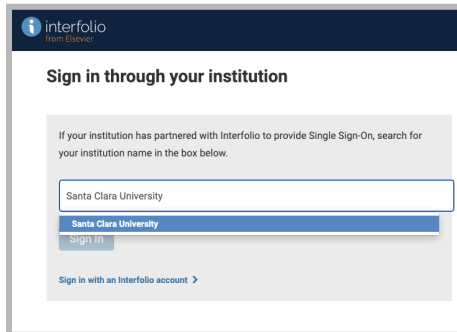
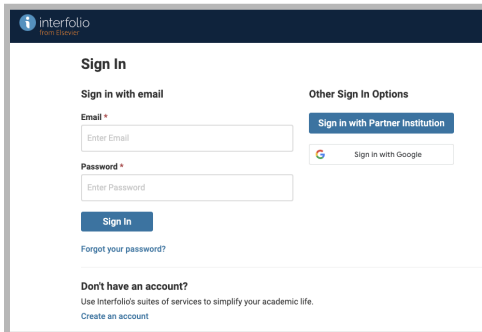
A



Sign into MySCU

Click on the Interfolio tile

B

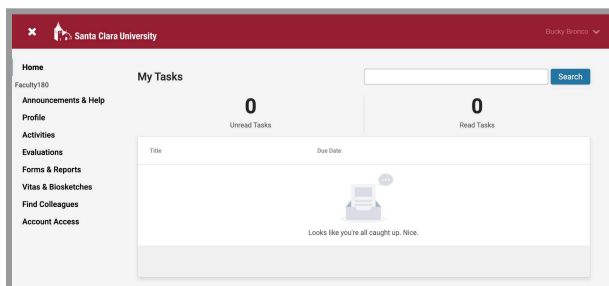


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

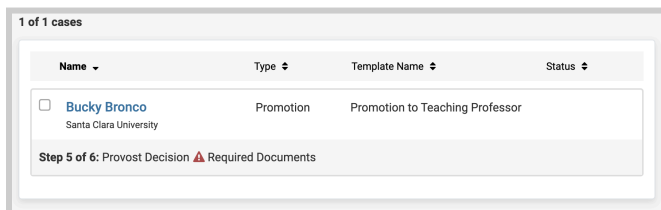
However you login, double-check that you're in the right account:



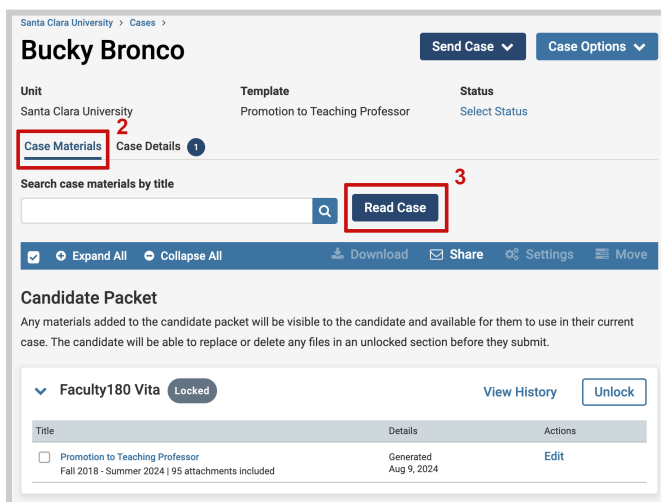
After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this (there may be cases in the central white window). If your screen doesn't look like this, you may be logged in to another Interfolio account. For troubleshooting support, contact Katie Williams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

STEP 2 - REVIEW THE CASE

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

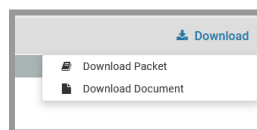


1. Click on the candidate's name in blue to bring you to the candidate's packet.
2. Select the **Case Materials** tab (upper left) of the candidate packet.
3. Click the dark blue **Read Case** button on the right to review the candidate's packet.



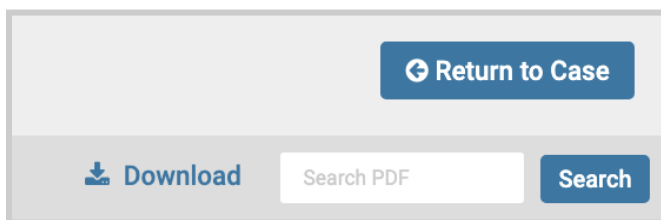
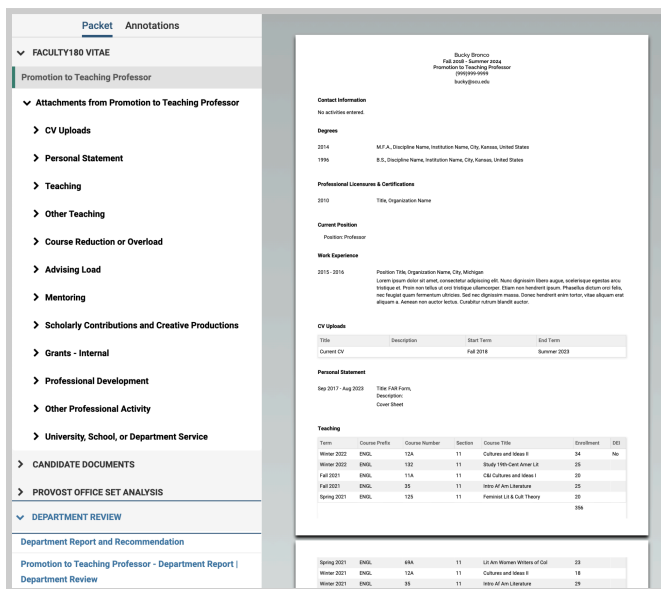
4. The left sidebar lists the sections of the candidate packet. Click on the > (caret) symbol next to any category to expand the section and to view its contents. There will be a section for every activity category for which the candidate has uploaded files.

You can also download an individual document, or the entire Faculty180 Vitae packet, using the blue Download button in the upper right of the browser window. You will receive an e-mail when the download has completed.



In addition to the candidate's materials, the sections in the left sidebar include:

- Provost Office SET Analysis, providing an overview of the candidate's numerical evaluation scores for teaching, compared against the department and school averages
- Department Review
- School Committee Review
- Dean Review



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

STEP 3 - COMPLETE THE REQUIRED FORM

Rather than uploading a file, you will complete a form indicating your recommendation. If you plan to add comments, you may wish to begin from a file that you can retain, and paste your comments from that document into the comment field in the form.

The screenshot shows the 'Case Details' tab selected. At the top, there are three tabs: 'Case Materials', 'Case Details' (highlighted with a red box and a '1' notification), and 'Status'. Below the tabs is a search bar for case materials by title, a 'Read Case' button, and a toolbar with options like 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move'. The main content area is titled 'Candidate Packet' and contains a paragraph of text explaining that materials added to the packet are visible to the candidate and available for their use.

1. Click the **Case Details** tab at the upper left. This section will reveal the Provost's required form: Promotion to Teaching Professor - Provost Decision.

The screenshot shows the 'Bucky Bronco' case page. At the top, there are 'Send Case' and 'Case Options' buttons. Below that, the 'Case Details' tab is selected. The page is titled 'Reviewing as Provost'. There is an 'Instructions' section and a 'Required Items' section with a '1 missing' notification. A table lists forms to be completed:

Form Name	Assignee	Actions
Promotion to Teaching Professor - Provost Decision 1 required questions	Committee Managers	Manage Respondents
Promotion to Teaching Professor - Provost Decision 1 required questions	Provost SCU (You)	Fill Out Form

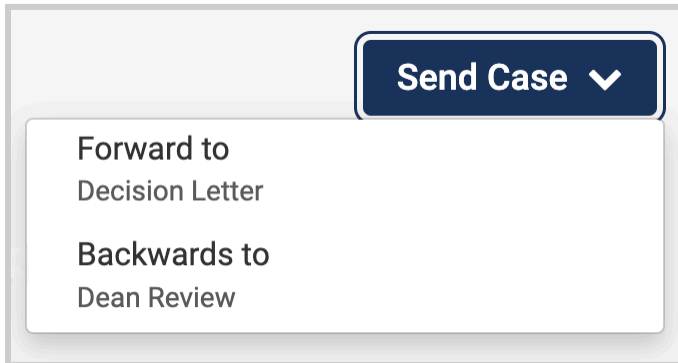
2. Click on the **Fill Out Form** link. Complete the form:

The screenshot shows the 'Promotion to Teaching Professor - Provost Decision' form. It includes a title, a brief description, and a section titled 'Decision on Promotion to Teaching Professor'. The decision question is: 'Do you approve the promotion of this candidate to Senior Lecturer?'. There are two radio button options: 'Yes' and 'No'. The 'Yes' option is selected and labeled with a red 'a'. Below the decision question is a 'Comments' section with a rich text editor. The editor is empty and labeled with a red 'b'. At the bottom of the form, there are three buttons: 'Submit Form' (labeled with a red 'd'), 'Save Responses' (labeled with a red 'c'), and 'Return to Case'.

- a. Select your recommendation.
- b. Type or paste in any 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.

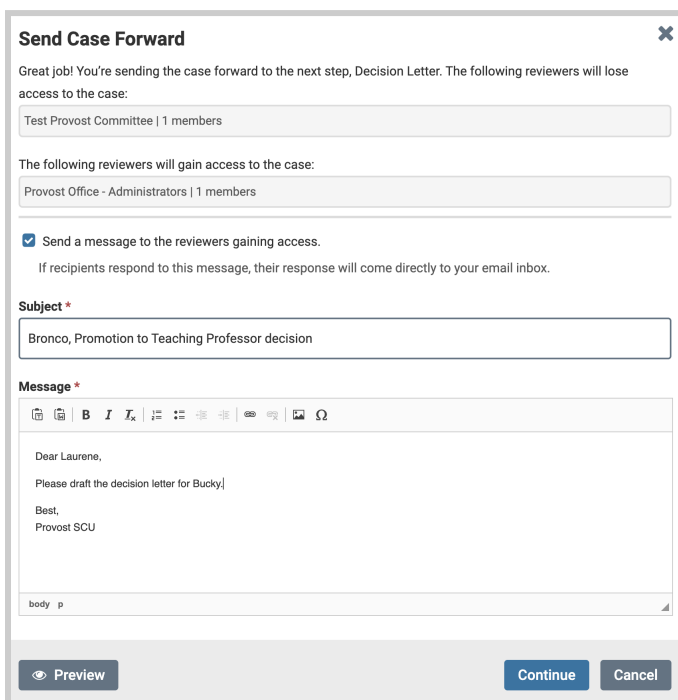
STEP 4 - SEND CASE FORWARD

You will now send the case to the Director of Faculty Personnel to draft the decision letter for the candidate. Provost Office staff will close the case when the appeal period has closed.



A dark blue button labeled "Send Case" with a downward-pointing chevron icon is positioned in the upper right corner. Below it, a white dropdown menu is open, showing two options: "Forward to Decision Letter" and "Backwards to Dean Review".

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



The "Send Case Forward" dialog box contains the following elements:

- Title:** Send Case Forward
- Message:** Great job! You're sending the case forward to the next step, Decision Letter. The following reviewers will lose access to the case:
 - Test Provost Committee | 1 members
- Message:** The following reviewers will gain access to the case:
 - Provost Office - Administrators | 1 members
- Checkboxes:** Send a message to the reviewers gaining access. If recipients respond to this message, their response will come directly to your email inbox.
- Subject:** A text field containing "Bronco, Promotion to Teaching Professor decision".
- Message:** A rich text editor containing:

Dear Laurene,
Please draft the decision letter for Bucky!
Best,
Provost SCU
- Buttons:** Preview, Continue, and Cancel.

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 submission.