Rank, Tenure and Promotion using Interfolio

Instructions for the Dean Partner

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STEP 1 - LOGIN TO INTERFOLIO

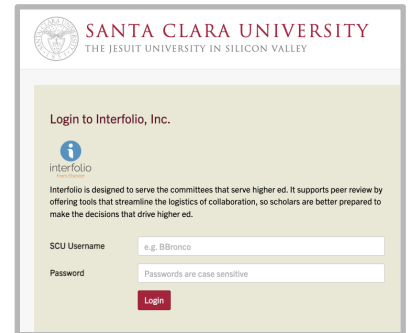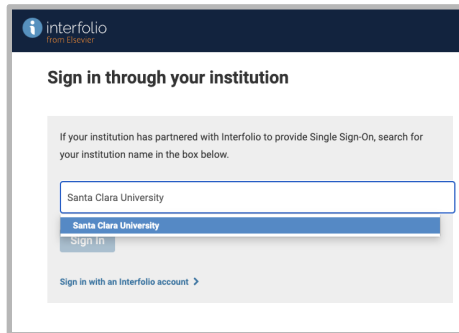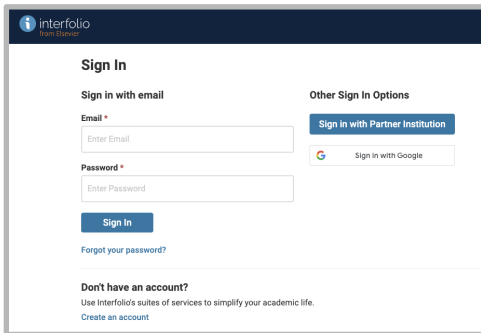**You can login to Interfolio one of two ways (A or B):**

A
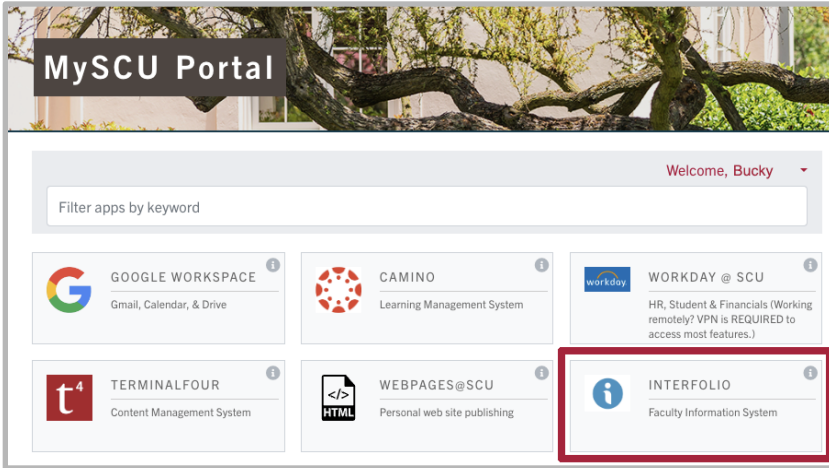
Sign into MySCU

Click on the Interfolio tile
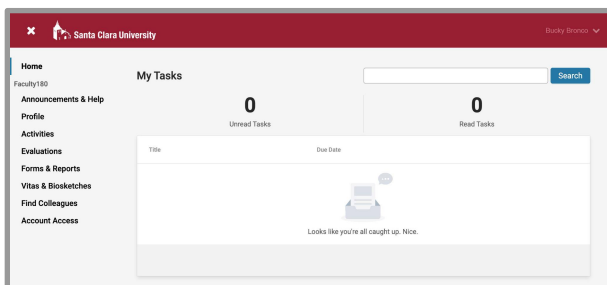
B

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. If it doesn't, you may be logged in to another Interfolio account. Contact Katie Williams (kfwilliams@scu.edu) to help you troubleshoot.

STEP 2 - CHECK THE CASE

You can review the candidate's petition when the case is shared with you, in order to check that the required materials have been included. A trigger with the candidate's name will appear on your dashboard:
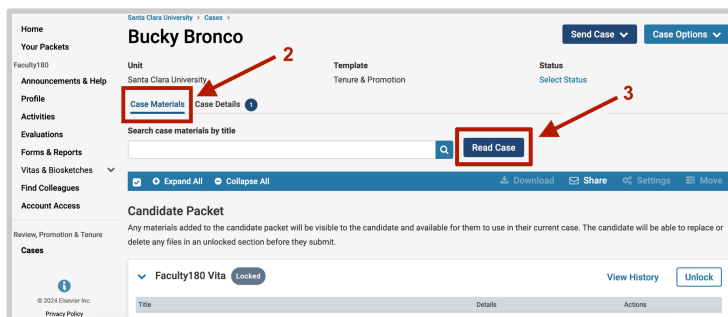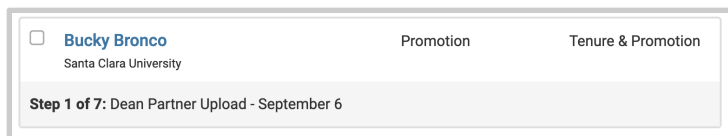

1. Click on the candidate's name in blue to bring you to the candidate's packet.

2. Select the Case Materials tab (upper left) of the candidate packet.

3. Click the Read Case button on the right to review the candidate's packet and to check that they submitted the necessary documents. Candidates for promotion to full who used the modified process (submitting scholarship and teaching documents on Google Drive) will have fewer files in Interfolio.
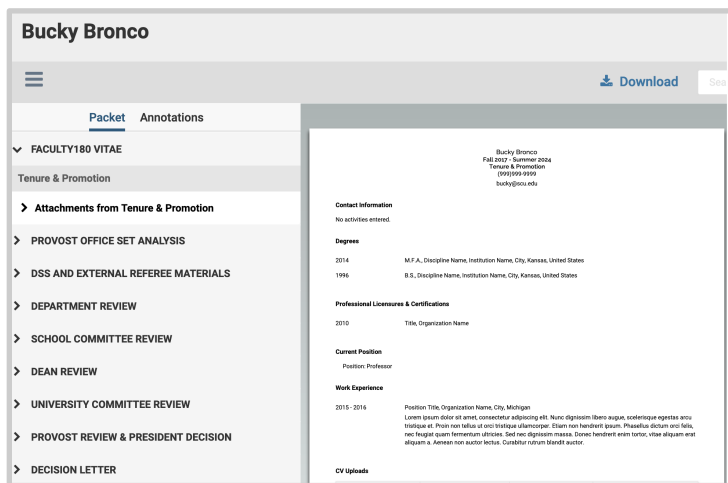
4. The left sidebar lists the sections of the candidate packet. Click on the › (caret) symbol next to any category to expand the section and to view its contents. There will be a caret and section for every activity category for which the candidate has uploaded files. Note that for those candidates going through the modified process (who elected to put their supporting materials in Google drive) the system-generated CV will be light.
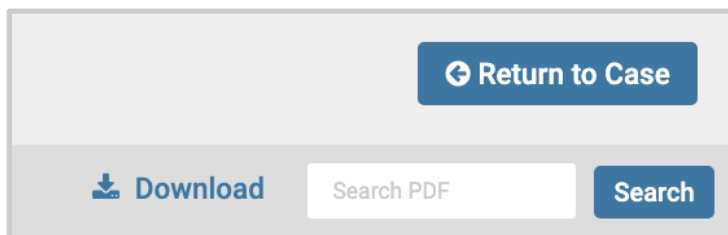
5. To exit the case materials, click the blue **Return to Case** button in the top right.

STEP 3 - UPLOAD DOCUMENTS TO CASE MATERIALS

Before you can add files to Interfolio, you should download them from Google Drive so that they're available from your laptop or desktop. The documents listed below are the documents that you will move. You will upload most of the documents at the Case Materials tab of the candidate's case. You will upload one document—the discipline-specific scholarship standards—at the Case Details tab (see Step 4).

> NOTE: Do not download all the supporting evidence for those candidates for full professor who chose to store their supporting evidence for scholarship and teaching on Google Drive; that supporting evidence will remain on Google Drive throughout their review.
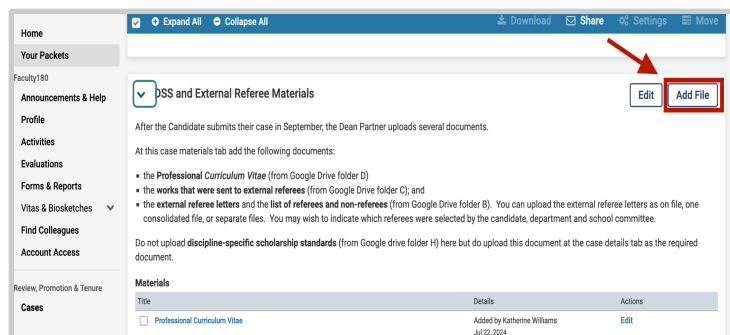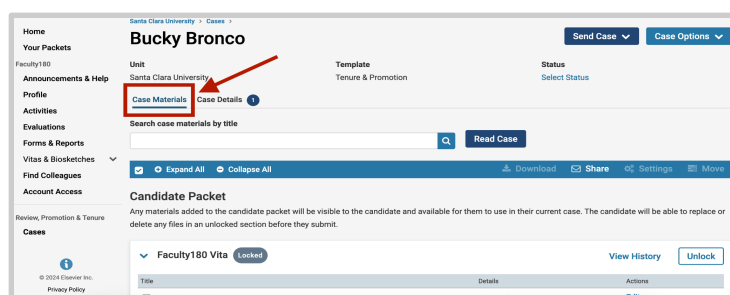

1. Click the **Case Materials** tab and scroll down.

2. Open the internal section titled **DSS and External Referee Materials** by clicking the caret to the left**.** When you open it, you will see an **Add** button that you can use to add files. You will use this button repeatedly to upload materials you've been storing for the candidate's case on Google Drive. The documents you will upload here are:

    a. **Professional** *Curriculum Vitae* (from Google Drive folder D)

    b. **works that were sent to external referees** (from GDrive folder C);

    c. **list of referees and non-referees** (from GDrive folder B); and

    d. **external referee letters** and (from GDrive folder B). You can upload the external referee letters as one consolidated file, or separate files. You may wish to indicate which referees were selected by the candidate, department and school committee.
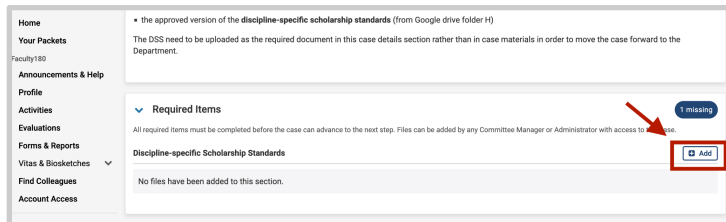
    We suggest using a standard naming convention for all four types of files across all candidates.

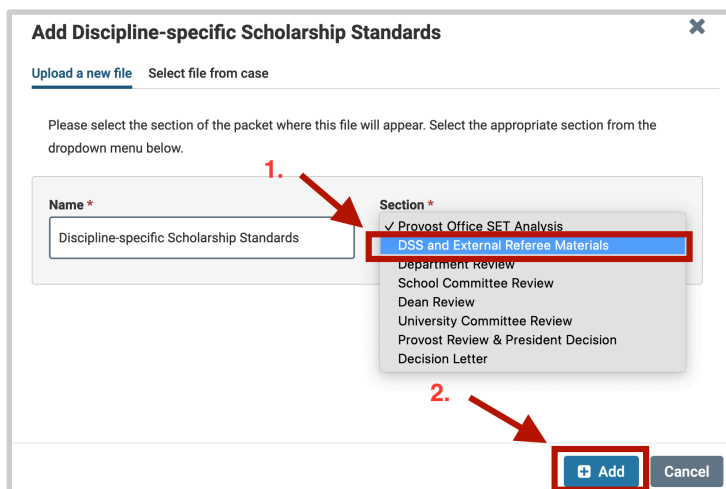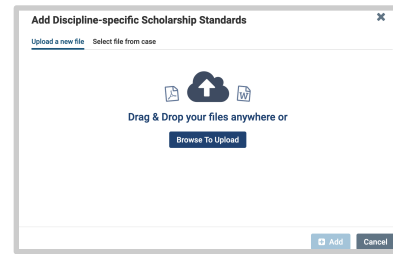# STEP 4 - UPLOAD ONE DOCUMENT TO CASE DETAILS

In this step, you'll upload the final required document—the approved discipline-specific scholarship standards, at the Case Details tab.
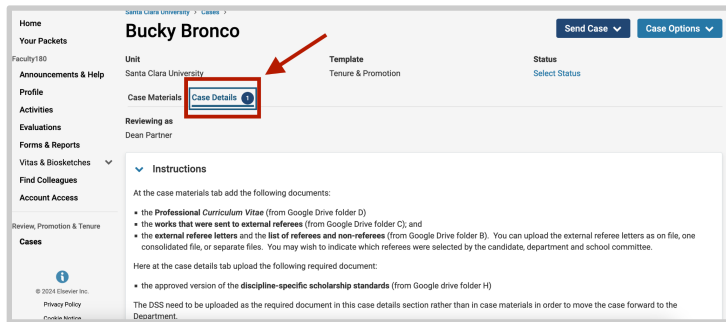

1. Go to Case Details tab.

2. Click the Add button to upload this document. Browse your computer for the standards.

3. After uploading the standards from your computer, this screen will pop-up. In the Section field, select "DSS & External Referee Materials." Then click the blue **Add** button (bottom right) to submit.

STEP 5 - SEND CASE FORWARD

After uploading the various documents to the case, you will send the case forward to the department for review:
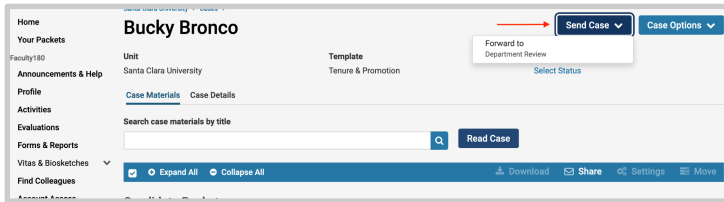
1. To forward the case to the Department Committee click on **Send Case** button.
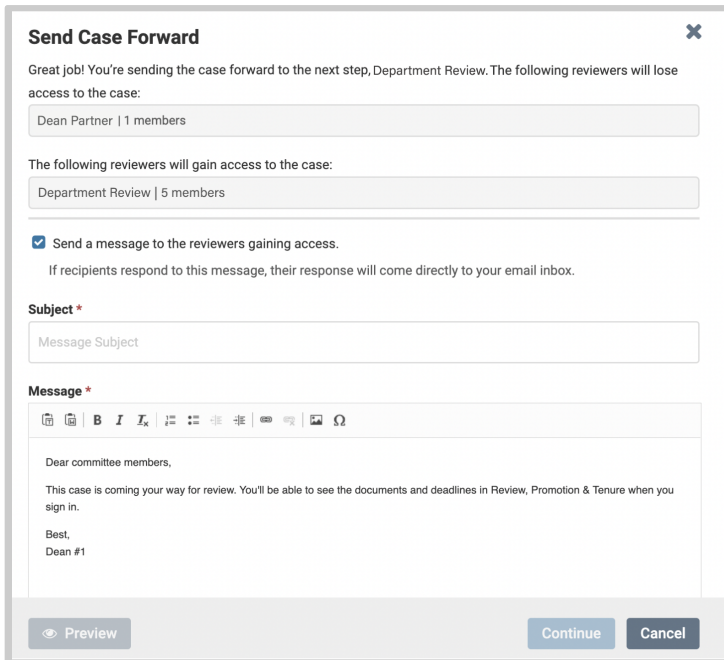
2. The blue Continue button will be inactive (faded) until you fill in the email Subject field. After filling in the Subject, edit your message if you wish and click the now active/blue **Continue** button.

   You have completed the submission.