Rank, Tenure and Promotion using Interfolio

Instructions for the Department

Overview

	Step	Page
INTERFOLIO Faculty Information System	**1. Login to Interfolio** Use the tile at the MySCU single sign-on portal.	2
Read Case	**2. Review the Case** All tenured faculty who are participating in the review read the case materials in Interfolio to inform their evaluation. Each writes a letter directed to the process chair that can be shared with the chair via Google Drive.	3-4

The remaining steps are for the process chair alone

	Step	Page
Add Member / Department Committee Member #1	**3. Remove Participating Faculty from the Case** After faculty have reviewed the case materials and written their letters, you will remove them from the department committee.	4
Case Details	**4. Upload Required Documents to Case Details** You will upload three required documents at the Case Details tab: faculty letters (if collated as one file), written summary of departmental discussion, and the chair's contextual summary letter.	5
Case Materials	**4a. Optional: Upload Letters to Case Materials** If you prefer to upload the faculty letters as separate files, upload one to the required "Faculty Members' Letters of Evaluation" slot at Case Details (step 4), and the rest at the Department Review step at the Case Materials tab.	6
Send Case ˅	**5. Send Case Forward** Send the case forward to the school rank and tenure committee for the next stage of review.	6

STEP 1 - LOGIN TO INTERFOLIO

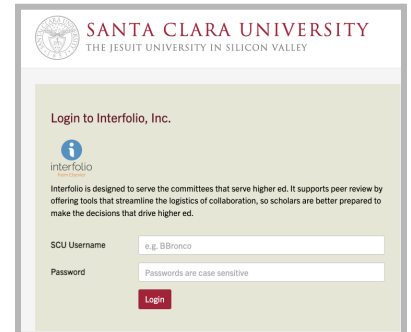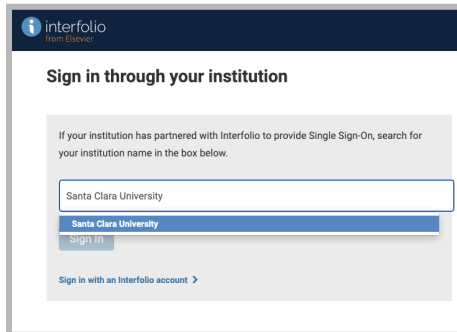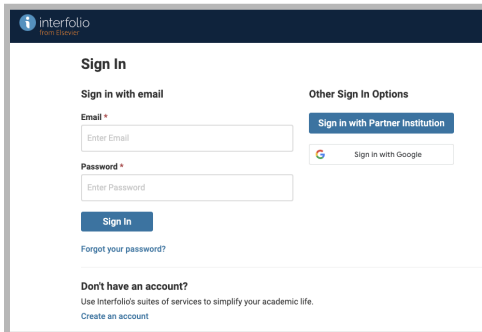**You can login to Interfolio one of two ways (A or B):**

A
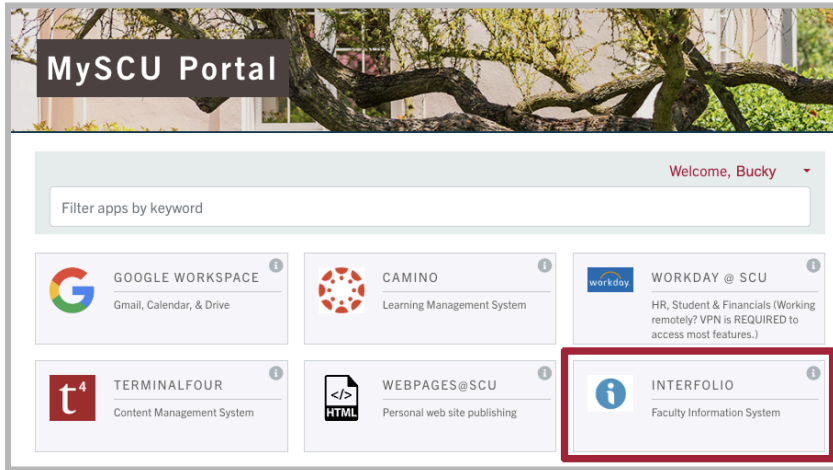
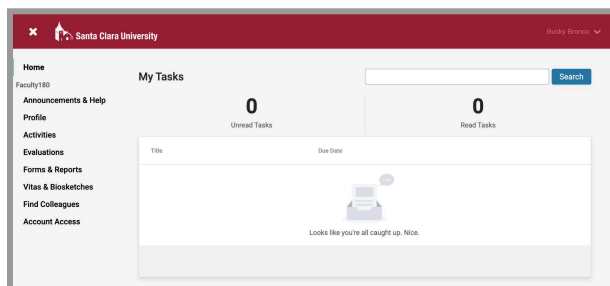
Sign into MySCU

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.
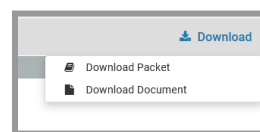
STEP 2 - REVIEW THE CASE

All tenured faculty participating in the case review will be given access to the candidate's case materials through Interfolio when it is forwarded to the department from the dean. A trigger with the candidate's name will appear on your dashboard:
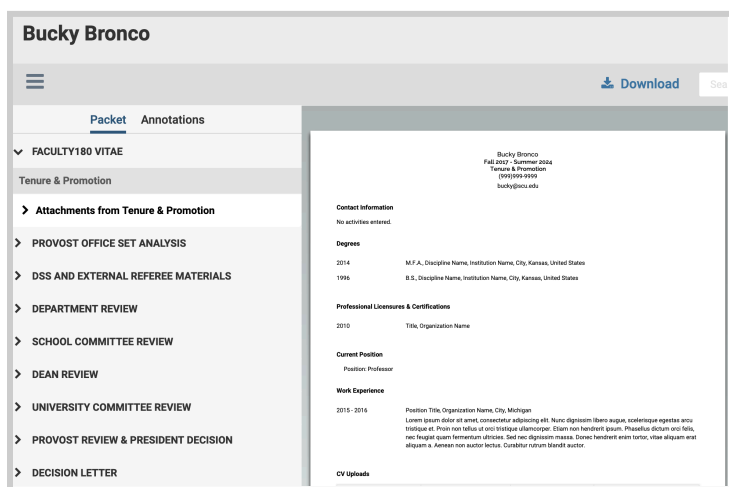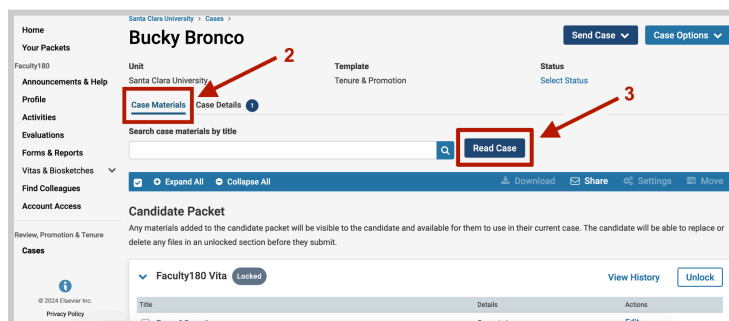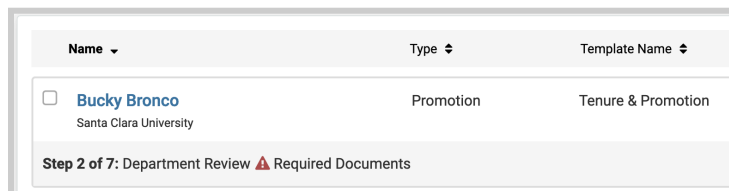

1. Click on the candidate's name in blue to bring you to the candidate's packet.

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

3. Click the Read Case button on the right to review the candidate's packet. Candidates for promotion to full who used the modified process (submitting supporting evidence of scholarship and teaching 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.

   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.

| Candidate Materials	Provost Office SET Analysis	DSS & External Referee Materials
There will be a caret and section for every activity category for which the candidate has uploaded files. For those candidates for promotion to Professor who elected the "modified process," you will find a link to their supporting evidence in their petition cover sheet, located in the area labeled "Attachments from Tenure & Promotion > Personal Statement."	Provides summary of course SET report averages and comparison to department and school averages for the period under review to a maximum of 10 years, excepting the initial online quarters during COVID (Winter and Spring 2020).	The dean provides the materials shared with external referees (professional CV, works shared, discipline-specific scholarship standards), the list of referees and non-referees, and the referees' letters.
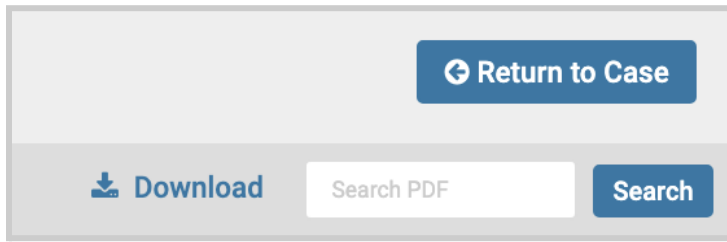
5. To exit the case materials, click the blue **Return to Case** button in the top right. You will write a letter to the process chair evaluating the case, assigning a whole number score from 1-5. Share this letter with the process chair in Google Drive.

The remaining steps are for the process chair alone

# STEP 3 - REMOVE PARTICIPATING FACULTY FROM THE CASE

When the participating faculty have completed their review of the case materials and submitted their letters, the process chair will remove them before uploading the required documents, to prevent individuals from viewing colleagues' letters or the chair's context letter.
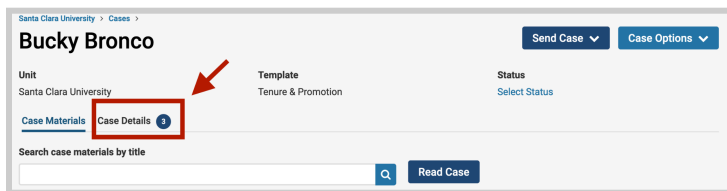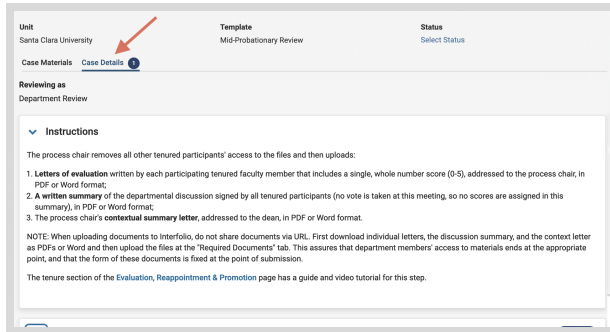

1. Select the Case Details tab

2. Scroll down to Committee Members

3. Click the Edit button
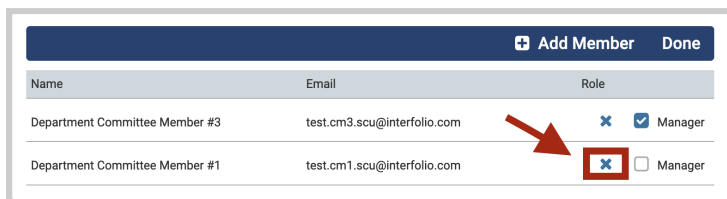
4. Click X next to the member's name you wish to remove.

STEP 4 - UPLOAD REQUIRED DOCUMENTS TO CASE DETAILS

The department or process chair will submit three required documents at the Case Details tab. Each document can only receive one uploaded file, so the faculty letters should be merged into a single Word or PDF file (however, if you prefer to upload the faculty letters as separate files, see the directions in the optional step 5). Have the files available on your desktop to facilitate uploading to Interfolio. The file names will appear in the sidebar for reviewers at subsequent stages, so please title them with that in mind.


Click the **Case Details** tab at the upper left. This section will reveal the department's required items:

1. Faculty Members' Letters of Evaluation
2. Written Summary of Departmental Discussion (signed by participants)
3. Contextual Summary Letter (by the process chair)
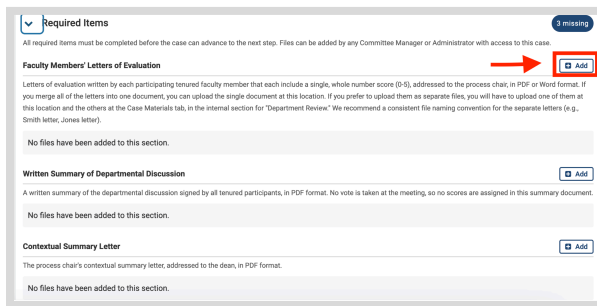
Click on the **Add** button at each required document to upload the file. A pop-up window will allow you to browse your computer for the document.
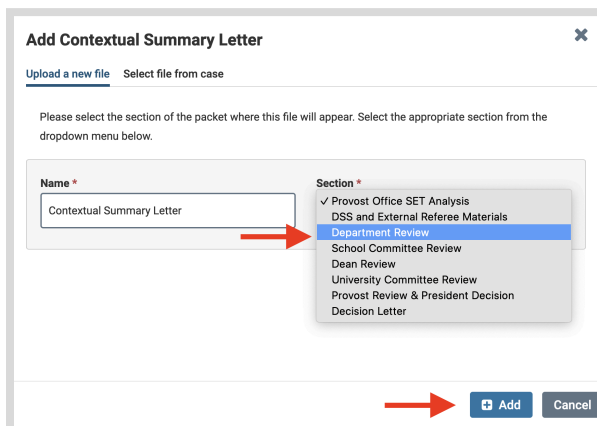

After uploading the document from your computer, this screen will pop-up. In the Section field, select "Department Review." Then click the blue **Add** button (bottom right) to submit.

# STEP 4a - OPTIONAL: UPLOAD LETTERS TO CASE MATERIALS
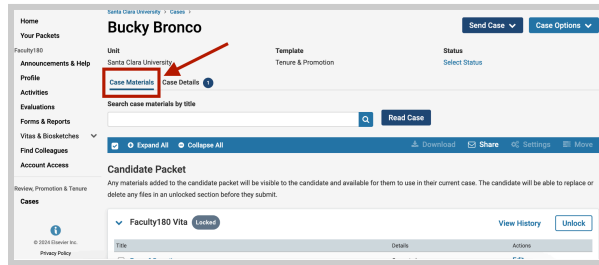
If you would prefer to upload faculty letters as separate files, we recommend that you collect all the letters on your computer, name them in a similar fashion, and then take two steps:

1. Upload one at the **Case Details** tab (as described on page 5 of this guide), at the required document labeled "Faculty Members' Letters of Evaluation," then

2. Navigate to the **Case Materials** tab, scroll down to the Department Review section, and add the other letters there one by one.
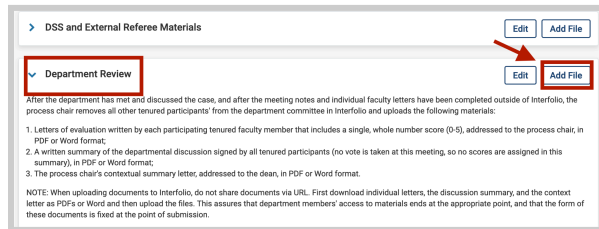
STEP 5 - SEND CASE FORWARD
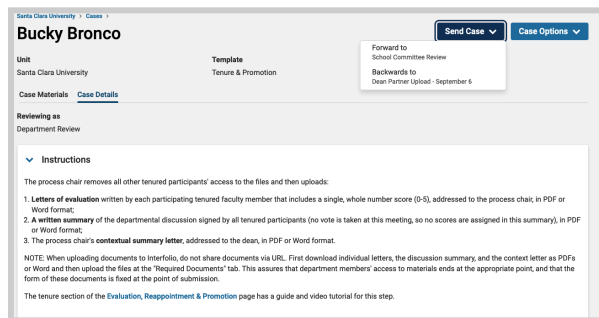
Click on the dark blue **Send Case** button in the upper right corner to move the case to the school rank and tenure committee.
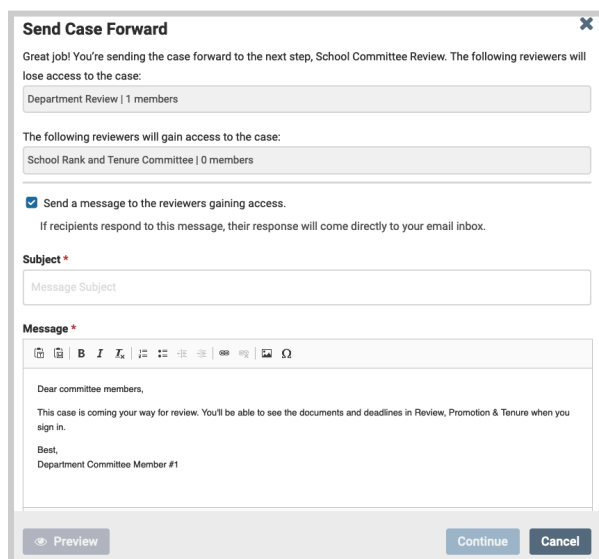
The blue Continue button (lower right) will be inactive (faded) until you fill in the email Subject field. After filling in the Subject, edit your message if you wish and click the now active/blue **Continue** button.

You have completed the submission.