

Faculty Activities Report using Interfolio

Instructions for Department Review for CAS & ECP

There are two ways to log on to Interfolio

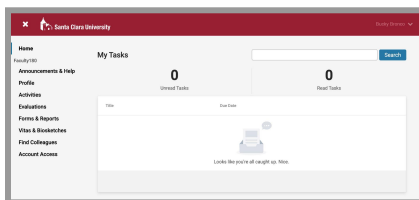
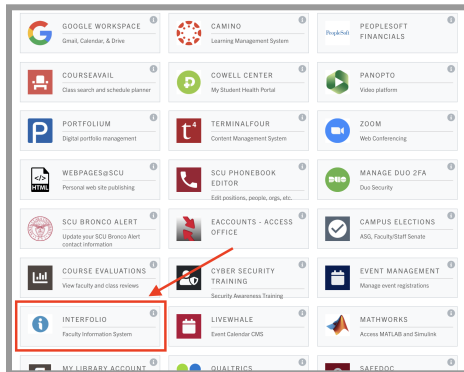
1. Faculty180: <https://www.scu.edu/interfolio>

Click the Partner Institution button.

Search for "Santa Clara University" and click the Sign In button.

Log in with your single sign-on credentials.

2. Click on the Interfolio tile on your SCU SSO page.

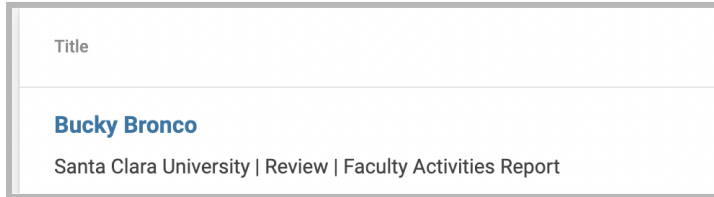


Check Your SCU Interfolio Dashboard

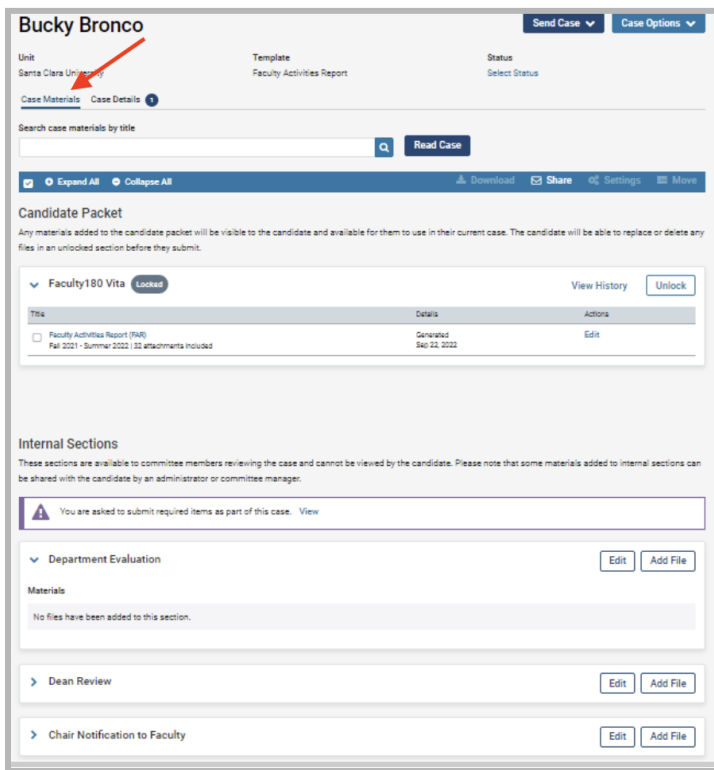
After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this. If it doesn't, you may be logged in to another Interfolio account. Contact Pandora del Carmen (pdelcarmen@scu.edu) to help you troubleshoot.

PART 1 - Reviewing the Faculty Member's Vita

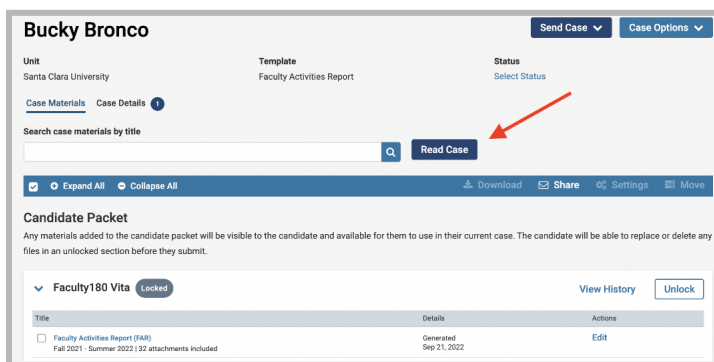
The Vita is a document that Interfolio automatically generates from the entries the faculty member has made in the Activities section of Faculty180 for their review period. You can preview their Vita when their case is shared with you. A trigger with the faculty member's name will appear on your dashboard:



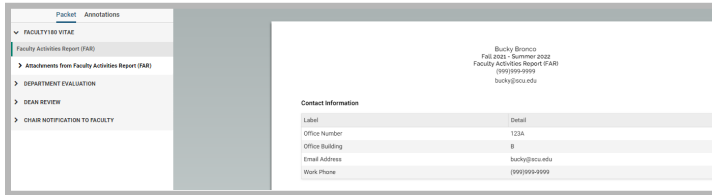
1. Click on the faculty member's name in blue to bring you to the faculty member's packet.



2. The following sections are available at the Case Materials tab (upper left) of the faculty member's packet:
 - a. Faculty180 Vita
 - b. Internal Sections - only available to individuals reviewing the case.

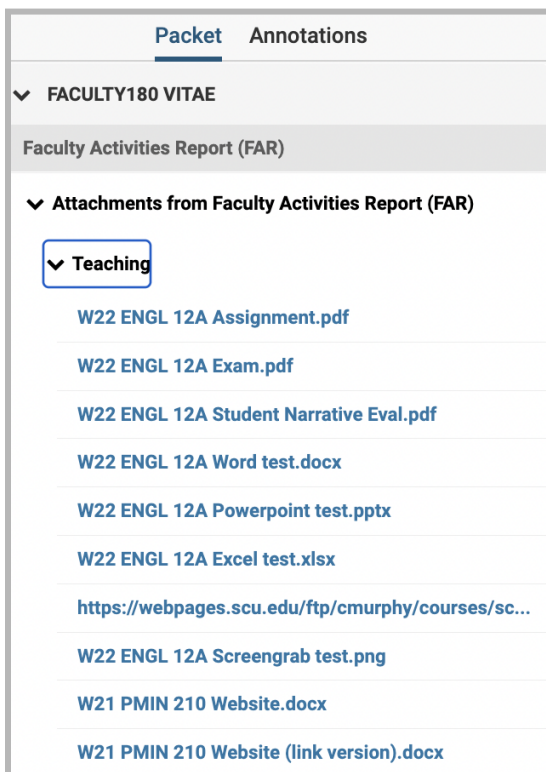


3. Click the **Read Case** button on the right to review the faculty member's Faculty Activities Report.



4. Here is what it looks like. The left sidebar lists the sections of the faculty packet. Click on any > (caret) symbol to expand the section and view the contents. In the main window, you'll see the system-generated Vita for the period under review. This Vita is shorter than their actual CV, as it only captures the activities they've listed for the period under review. (Your school may require a full and current CV as well, which can be found in the left sidebar at **CV Uploads**).

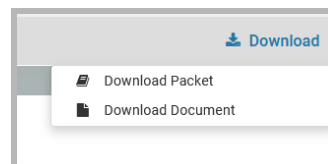
Review Faculty180 Vitae Documents



Click on **Faculty180 Vitae** in the left sidebar to view the order and titles of the uploaded documents. Click on any > (caret) symbol to expand the section.

Activity categories are listed in the order they appear in the faculty member's Faculty180 Activities listing. Within the Teaching section, files are listed by course in chronological order beginning with the most recent term, with titles assigned by the faculty.

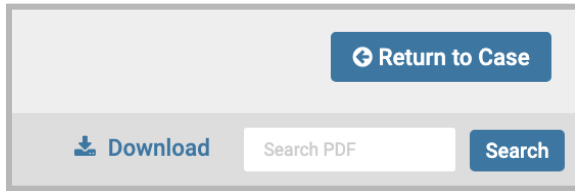
You can click on any document to view it in the browser window. You can increase the size of the document in the window using the zoom tool in the lower left. If you need to compare two documents, such as two versions of a syllabus, you can open another browser window and login to Interfolio, navigating to the appropriate second document in the case.



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. If you choose to download the packet, you can do that either as a zip file of the individual documents or as a single PDF. You will receive an email when the download has been completed. Login to Interfolio, and click on "Your Files Are Ready to Download" on your dashboard to open the candidate's file. Be sure to delete the materials from your computer when you're finished reviewing the case.

How to Exit the Faculty180 Vitae Section



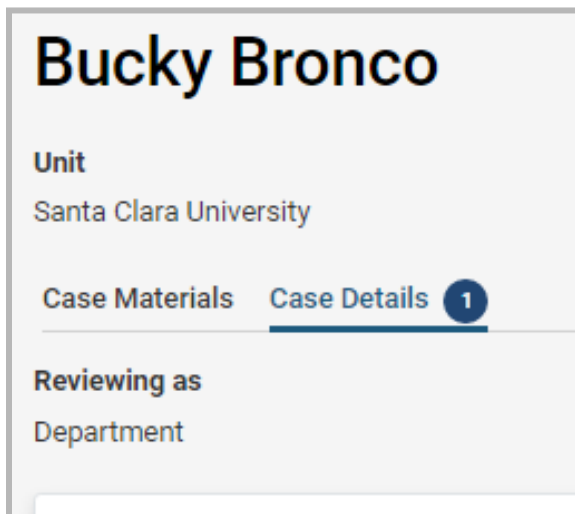
Click the blue **Return to Case** button in the top right to exit.

PART 2 - Uploading FAR Evaluation Letter Draft & Sharing the Draft with the Associate Dean

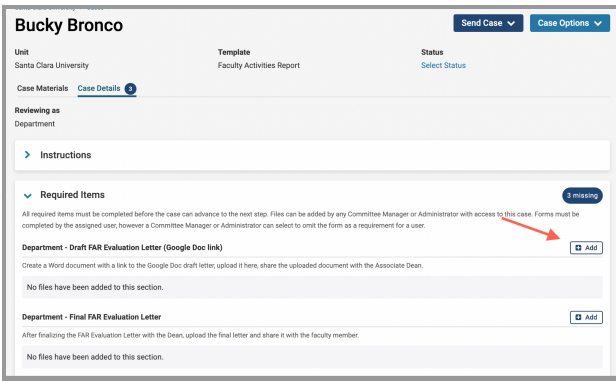
When the chair or department committee has finished reviewing the faculty member's materials, they will draft a FAR Evaluation Letter in Google Drive. The committee discusses the case and finalizes the letter in Google Drive. The chair then removes department committee members, if any, from the viewing permissions on the Google Doc draft letter, adds the dean (or associate dean), and creates a Word document with a link to the Google Doc. The Word doc is then shared with the dean (or associate dean) in Interfolio.

The reason that a Word doc with a link is shared, rather than the document itself, is to allow the dean and chair to collaborate more easily on any changes that may need to be made to the letter.

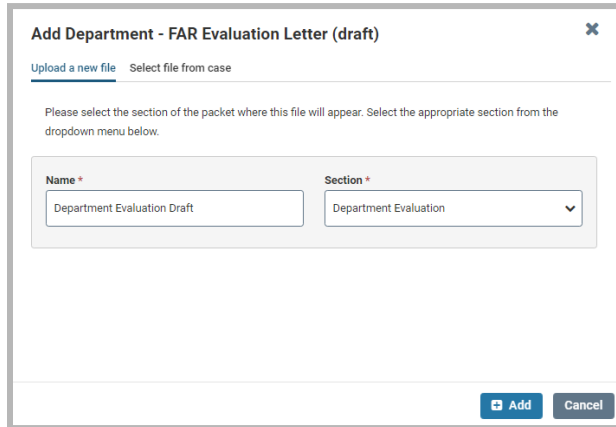
The following directions are for the chair.



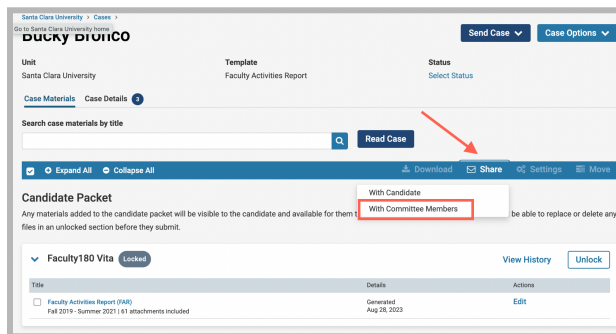
1. Click the **Case Details** tab at the upper left of the Interfolio window. This section will reveal the department's required item: the FAR Evaluation Letter (draft).



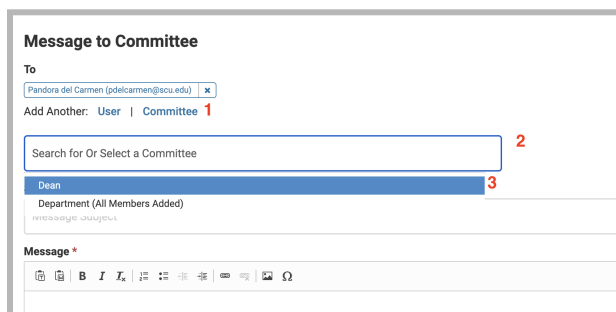
2. **Upload the FAR Evaluation Letter (draft)**
Click on the **Add** button to the right of the heading to upload the Word document with a link to the Google Drive draft letter. A pop-up window will allow you to browse your computer for the document.



3. After uploading the Word doc from your computer, this screen will pop-up. In the Section field, select “Department Evaluation.” Then click the blue **Add** button (bottom right) to submit.

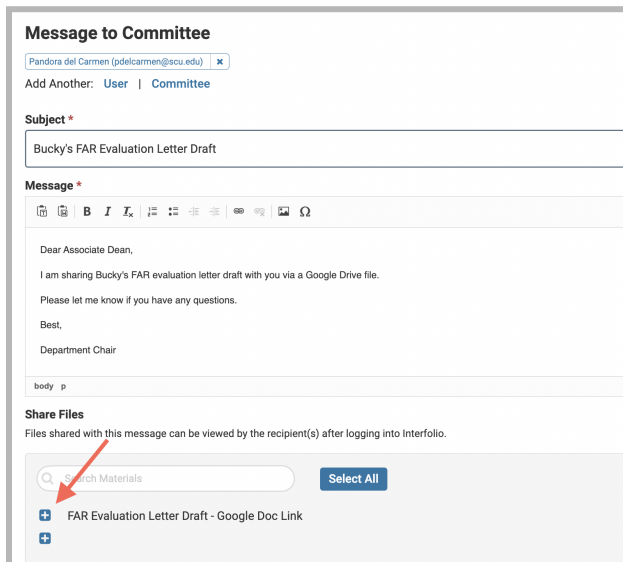


4. Click on **Share** button on the blue banner, select “with Committee Members.” You have some options here, such as sharing with one or more of the original committee members or sharing with the dean. You’re going to choose the dean:



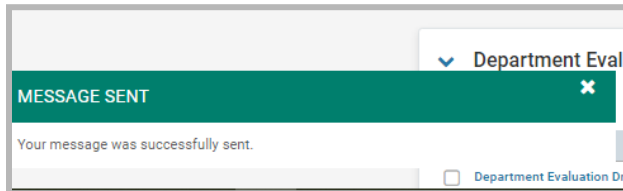
- a. Click on “Committee” (1).
- b. This will open “Search for Or Select a Committee” (2).
- c. Click there to open the options and select “Dean” (3).

The document that the chair shares with the dean or associate dean is the Word document with the link to the FAR evaluation letter draft in Google Drive.



5. This messaging window will pop up. Complete the Subject and Message to the dean or associate dean. Select the **FAR Evaluation Letter Draft** to share with the associate dean.

Click the blue **Send** button to share the FAR Evaluation Letter with the associate dean.



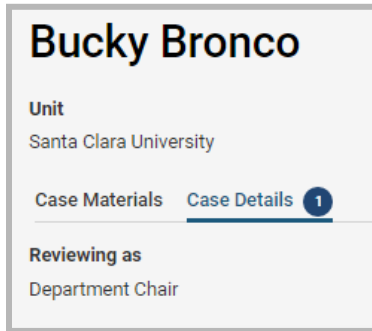
This message will pop up at the bottom of your screen when the letter has been successfully shared with the associate dean.

You'll then discuss and revise the letter with the associate dean.

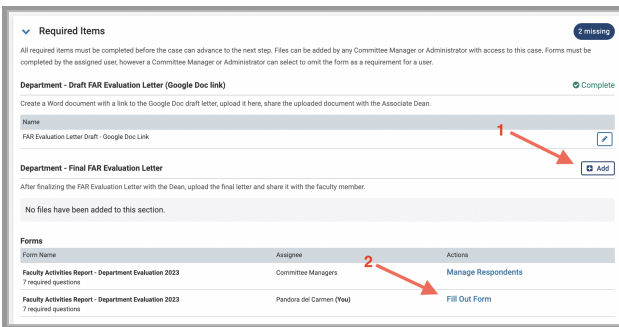
PART 3 - Notify the Faculty Member

After consulting with the dean and finalizing the Google Doc version of the letter, the chair will upload a PDF of the final FAR Evaluation Letter in Interfolio (not a link to the Google Drive document), and then share it with the faculty member. Some chairs have a practice of sharing a physical copy of the letter with the faculty member and meeting to discuss it before taking this final required step in Interfolio.

To submit the FAR Evaluation Letter:



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



1. Final FAR Evaluation Letter
2. Required Form

Item 1: Upload the Final FAR Evaluation Letter

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

Item 2 - Submit Required Form

Click on **Fill Out Form** under Actions. This form will pop-up. Complete the form with the individual evaluation scores for each of the three criteria (teaching, scholarship, and service), as well as the weight for each criterion. Typical weights for each rank are:

Rank	Teaching	Scholarship*	Service
AYAL	0.95		0.5
RTL, SL	0.70	0.15	0.15
Tenure-track	0.4	0.4	0.2

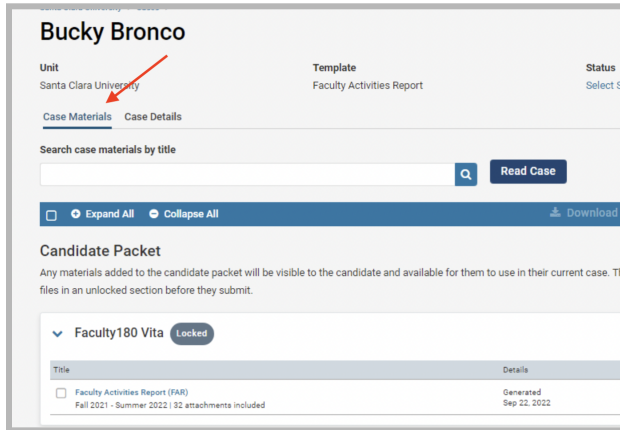
* "Professional Activity" for Lecturers and Senior Lecturers

Once you've filled in the scores and weights, click in sequence on:

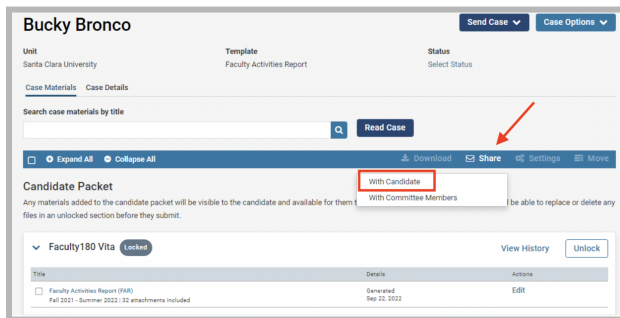
1. **Save Responses** button
2. **Submit Form** button

The screenshot shows the 'Faculty Activities Report - Department Evaluation 2023' form. It includes sections for Teaching, Scholarship/Creative Activity, and Service, each with a score and weight field. At the bottom, there is an 'Overall Score' section and buttons for 'Submit Form', 'Save Responses', and 'Return to Case'. Red arrows point to the 'Save Responses' and 'Submit Form' buttons.

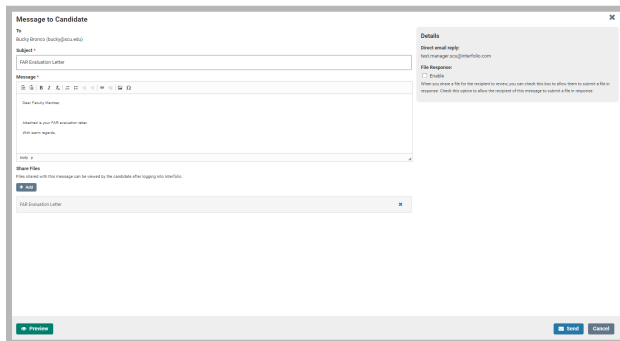
To Share the Letter with the Faculty Member in Interfolio:



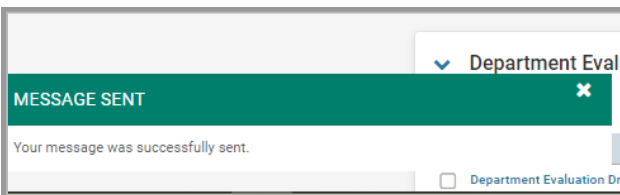
1. Click the **Case Materials** tab at the upper left.



2. Click the **Share** button on the blue banner.
3. Select “With Candidate.”



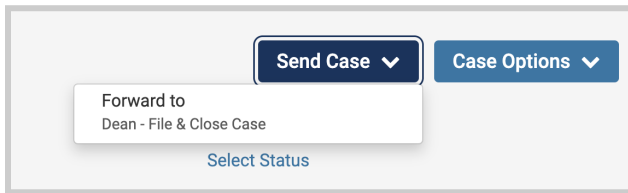
4. This messaging window will pop up. Complete the Subject and Message to the faculty member. Select the Final **FAR Evaluation Letter** to share with the faculty member. **DO NOT** select the Department Evaluation Draft or “Select All” button.
5. Click the blue **Send** button to share the FAR Evaluation Letter with the faculty member.



6. This message will pop up at the bottom of your screen when the letter has been successfully shared with the faculty member. Remind them to upload their original FAR and the department’s FAR Evaluation Letter in the designated Faculty180 Activities section (“Historical FARs & FAR Evaluation Letters”), so it’s there for future multi-year evaluations.

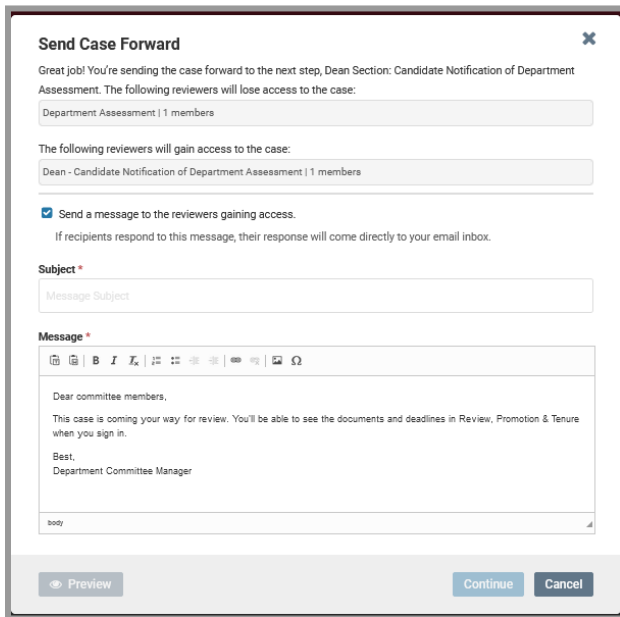
To Share the Letter with the Dean in Interfolio (final steps):

The final step is to send the case to the Dean, so that they can update faculty personnel records.



A screenshot of the Interfolio interface showing a dark blue button labeled "Send Case" with a downward arrow. To its right is a blue button labeled "Case Options" with a downward arrow. Below the "Send Case" button is a white dropdown menu with the text "Forward to" and "Dean - File & Close Case". Below the dropdown menu is a blue link labeled "Select Status".

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



A screenshot of the "Send Case Forward" dialog box in Interfolio. The dialog box has a title bar with "Send Case Forward" and a close button (X). The main content area contains the following text: "Great job! You're sending the case forward to the next step, Dean Section: Candidate Notification of Department Assessment. The following reviewers will lose access to the case:" followed by a text field containing "Department Assessment | 1 members". Below this is another text field containing "Dean - Candidate Notification of Department Assessment | 1 members". There is a checkbox labeled "Send a message to the reviewers gaining access." which is checked. Below the checkbox is the text "If recipients respond to this message, their response will come directly to your email inbox." There is a "Subject" field with a placeholder "Message Subject". Below the subject field is a "Message" field with a rich text editor toolbar. The message body contains the 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, Department Committee Manager". At the bottom of the dialog box are three buttons: "Preview", "Continue", and "Cancel".

2. 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.