Faculty Activities Report using Interfolio
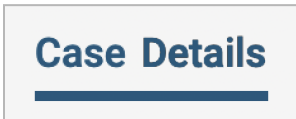
Instructions for the Dean
(JST)

Overview

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	3. Complete Required Steps Upload the FAR Evaluation Letter and fill out a form indicating the appropriate merit scores and criteria weights. Please note: the form has two sections, one for Lecturers, Senior Lecturers and tenure-track faculty, and one for academic year adjunct lecturers. Please fill out only the relevant part of the form.	4-5
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STEP 1 - LOGIN TO INTERFOLIO

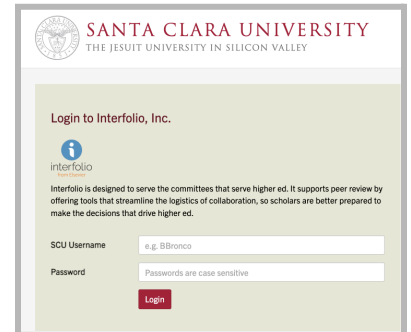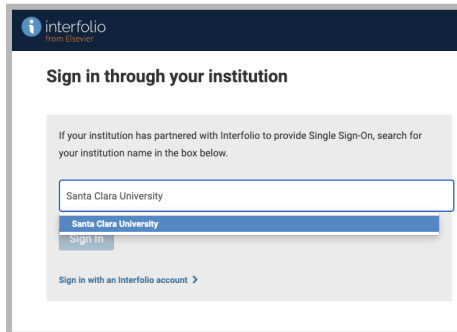**You can login to Interfolio one of two ways (A or B):**

A
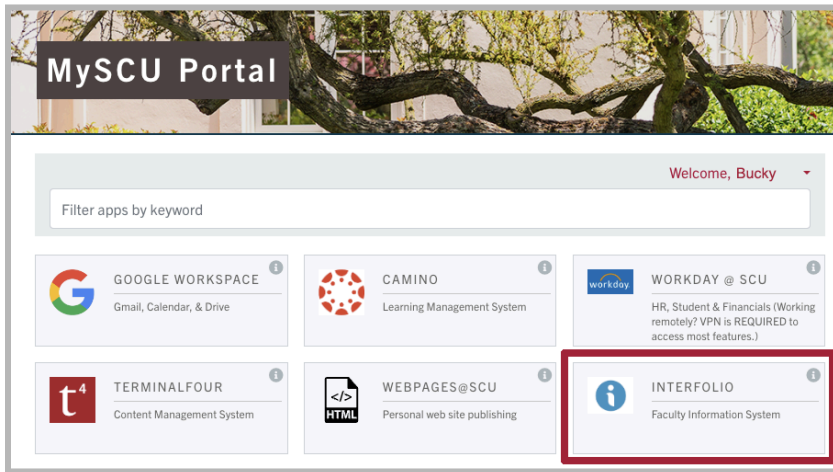
Sign into MySCU

Click on the Interfolio tile

B
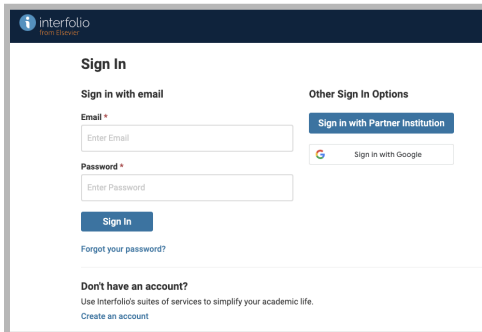
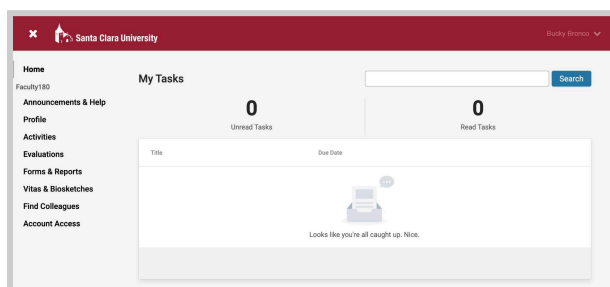Go to https://www.scu.edu/interfolio | Type in Santa Clara University | Log in to MySCU Portal

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 - REVIEW CASE & DOWNLOAD VITA

You will be given access to the candidate's case materials through Interfolio when the candidate submits their case. A trigger with the candidate's name will appear on your dashboard:
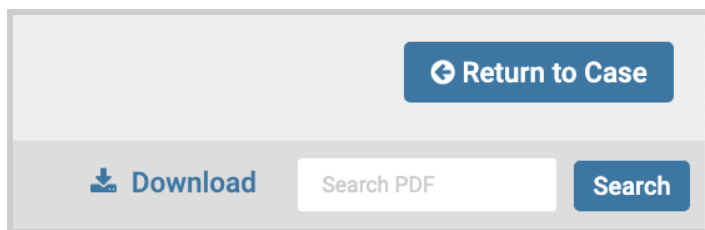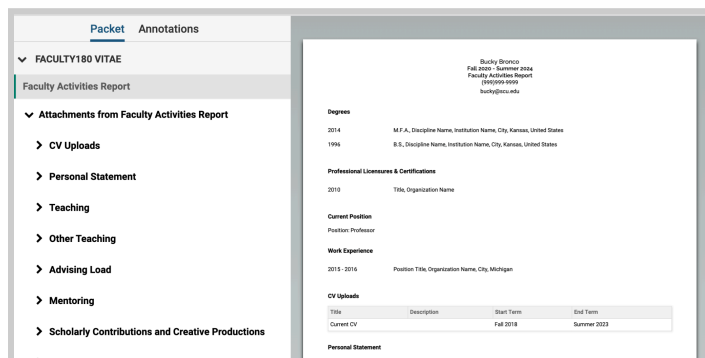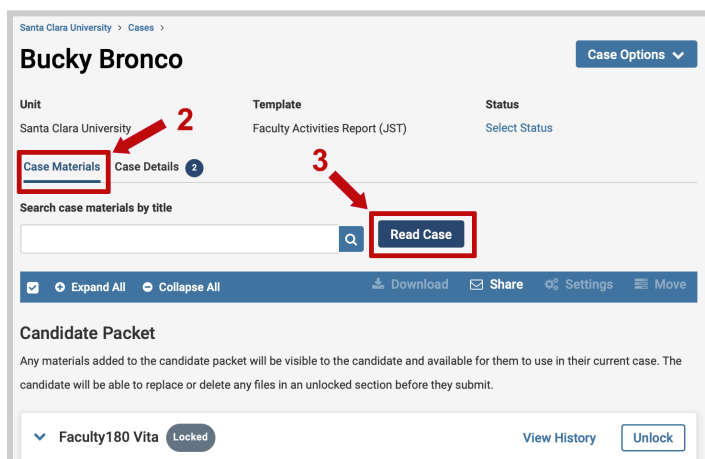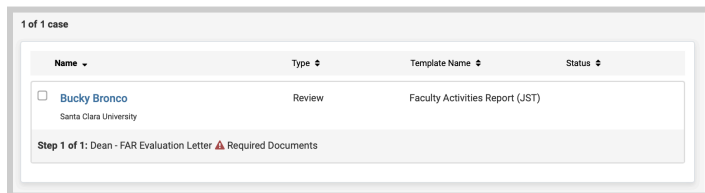
1. Click on the candidate's name in blue to bring you to the candidate's packet.

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.

5. You can also download an individual document, or the entire Faculty180 Vitae packet, using the
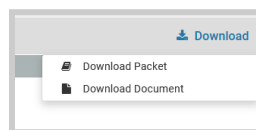
blue Download button in the upper right of the browser window. You will receive an email when the download has completed. With the vita in the browser window, download that document and add it to the faculty member's personnel file.

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

Write your evaluation letter. For renewable-term lecturers and tenure-track faculty, the letter should include guidance to enhance their candidacy for promotion.

STEP 3 - COMPLETE REQUIRED STEPS

The department or process chair will submit one required document and fill out one required form at the Case Details tab. Have the file available on your desktop to facilitate uploading to Interfolio.

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

1. Required Document: Dean - FAR Evaluation Letter (PDF file)
2. Required Form: FAR - Dean Evaluation (JST)

1. Required Document

Click on the **Add** button to upload the FAR Evaluation Letter (PDF). A pop-up window will allow you to browse your computer for the letter.

After uploading the letter from your computer, this screen will pop-up. In the Section field, select "Dean Evaluation." Then click the blue **Add** button (bottom right) to submit. Remember to add your evaluation letter to the faculty member's personnel file, in addition to their FAR Vita.

FAR - Dean Evaluation (JST)

Use the form below appropriate to the rank of the faculty under evaluation. The score is the merit score on the school scale for performance for each of the evaluative criteria. The weight is the percentage of the overall score that each criterion is assigned, defined by rank.

Tenure-stream Faculty, Renewable-term Lecturers and Senior Lecturers

Use this section of the form for faculty in the ranks or tracks listed above. There is a separate section below for academic year fixed-term faculty (Academic Year Adjunct Lecturers, Dean's Executive Professors, and Professors of Practice).

Teaching Score

Teaching Weight

Enter the percentage weight for teaching in the following format: for the 40% that is typical for tenure-stream faculty, enter 0.4; for the 70% typical for renewable-term lecturers and senior lecturers, enter 0.7.

Scholarship/Creative Activity or Professional Activity Score

For tenure-stream faculty, enter the score for scholarship or creative activity. For renewable-term lecturers and senior lecturers, enter the score for professional activity.

Scholarship/Creative Activity or Professional Activity Weight

For tenure-stream faculty, enter the weight for scholarship or creative activity (typically .40 [40%]). For renewable-term lecturers and senior lecturers, enter the weight for professional activity (typically .15 [15%]).

Service Score

Service Weight

Enter the weight for service. This is typically .20 (20%) for tenure-stream faculty, and .15 (15%) for renewable-term lecturers and senior lecturers.

Overall Score

Academic Year Fixed-Term Faculty Form

Use this form for academic year fixed-term faculty: Academic Year Adjunct Lecturers, Dean's Executive Professors, and Professors of Practice.

Teaching
Teaching counts for 95% of the overall evaluation.

○ Exceeds Expectations/Superior Performance

○ Meets Expectations

○ Below Expectations

Service
Service counts for 5% of the overall evaluation.

○ Meets or Exceeds Expectations

○ Below Expectations

Overall

○ Satisfactory

○ Unsatisfactory

Submit Form   Save Responses   Return to Case

2. Required Form

Click **Fill Out Form** under Actions; this form will pop-up. The form has two sections. The top section should be used if the faculty member is a renewable-term lecturer, senior lecturer, or tenure-stream faculty member, thus for the following ranks:

- Lecturer
- Senior Lecturer
- Assistant Professor
- Associate Professor
- Professor

The bottom part of the form should be used if the faculty member is an academic year, fixed-term faculty member, thus for faculty with the following titles:

- Academic Year Adjunct Lecturer
- Professor of Practice
- Dean's Executive Professor

Using the appropriate part of the form, fill in the individual evaluation score and weight for each of the three criteria (teaching, scholarship, and service). Note that, for academic year, fixed-term faculty, weights are not required. Typical weights for the other ranks are:

Rank	Teaching	Scholarship*	Service
RTL/SL	0.70	0.15	0.15
Tenure track	0.40	0.40	0.20

* "Professional Activity" for RTLs/SLs

- **Save Responses** button. This takes you to the prior screen; click "Fill Out Form" to return to the form screen to submit the form.
- **Submit Form** button

If you wish to send the letter to the faculty member via Interfolio rather than in hard copy or via email, you need to do this before you send the case forward. See pp. 6-7 for directions.

STEP 4 - SHARE LETTER WITH FACULTY MEMBER

Share the letter with the faculty member, via email, in hard copy, or in Interfolio. Discuss the results with them if they have questions. Mention their right to file a written response to the letter (Faculty Handbook 3.3).
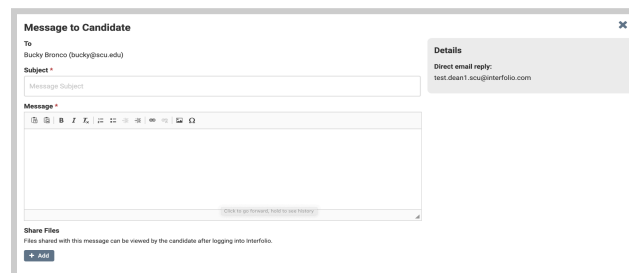
Directions follow for sharing the letter with the faculty member from within Interfolio, if you choose this method.
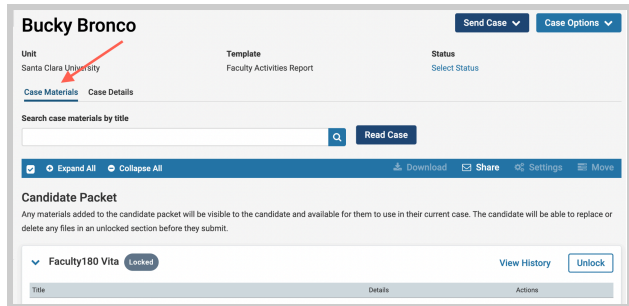

1. Click the **Case Materials** tab at the upper left.
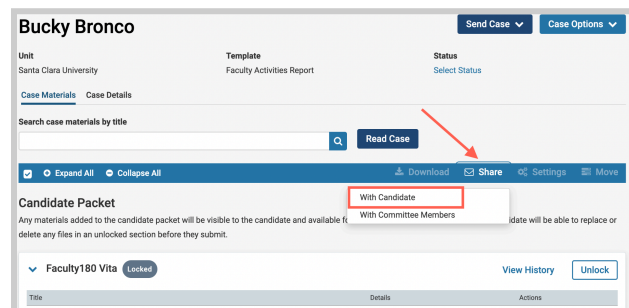
2. Click the **Share** button on the blue banner. Select "With Candidate."

3. This messaging window will pop up. Complete the Subject and Message to the faculty member. Select the **FAR Evaluation Letter** to share with the faculty member. **DO NOT** select the other uploaded documents or the "Select All" button. Then click the blue **Send** button to share the FAR Evaluation Letter with the faculty member. A message will pop up briefly to indicate that the message has been successfully shared with the faculty member.
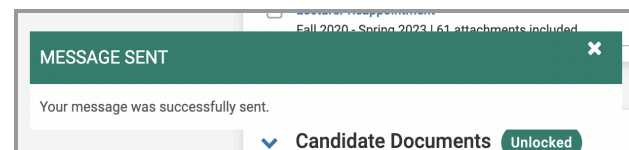
STEP 5 - CHANGE STATUS OF CASE

Change the status of the case to "FAR: Complete." This indicates to Provost Office staff that you have completed your review and downloaded all needed materials to the faculty member's personnel file. The Provost's Office will subsequently close the case.
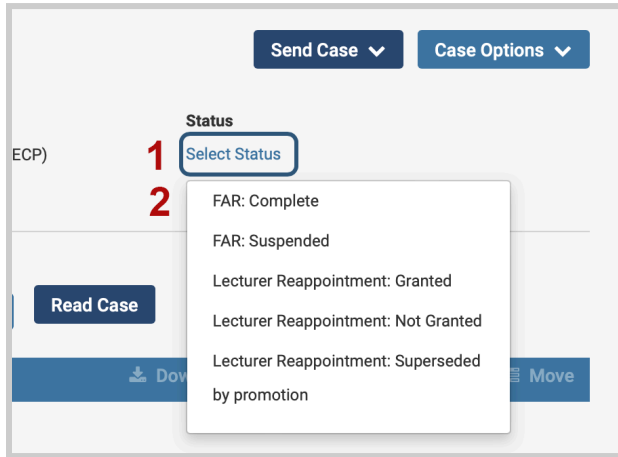
1. Click **Select Status**

2. From the pop-up window, select "FAR: Complete."

You have completed the Dean steps for the case.

Note: You can request a report of completed cases and faculty merit scores/weights; email Katie Williams (kfwilliams@scu.edu) or Kitty Murphy (cmurphy@scu.edu).