Mid-Probationary Review using Interfolio

Instructions for the Provost

## Overview

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STEP 1 - LOGIN TO INTERFOLIO

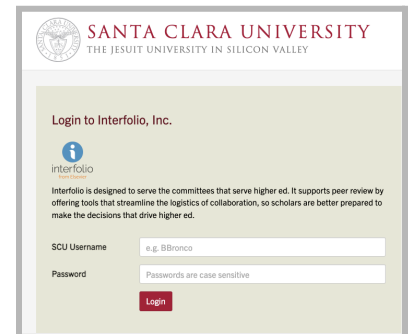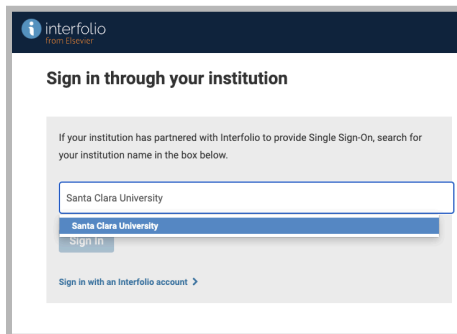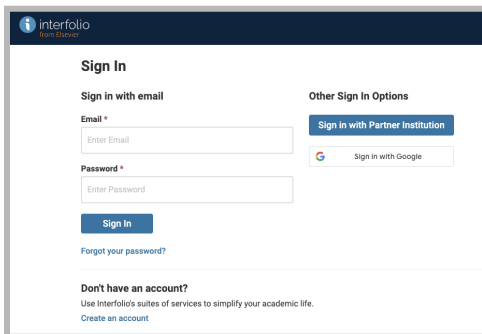**You can login to Interfolio one of two ways (A or B):**

A
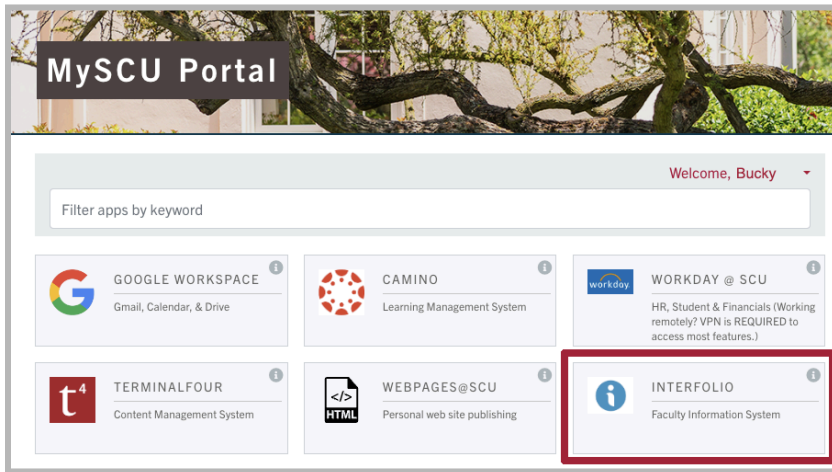
Sign into MySCU
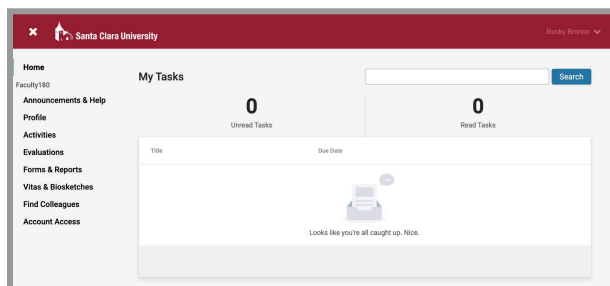
Click on the Interfolio tile

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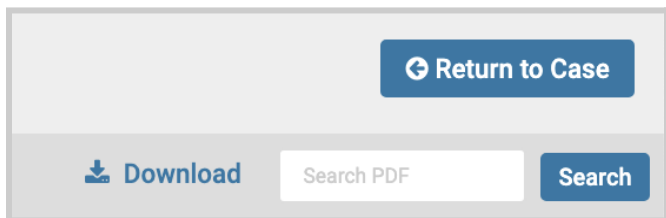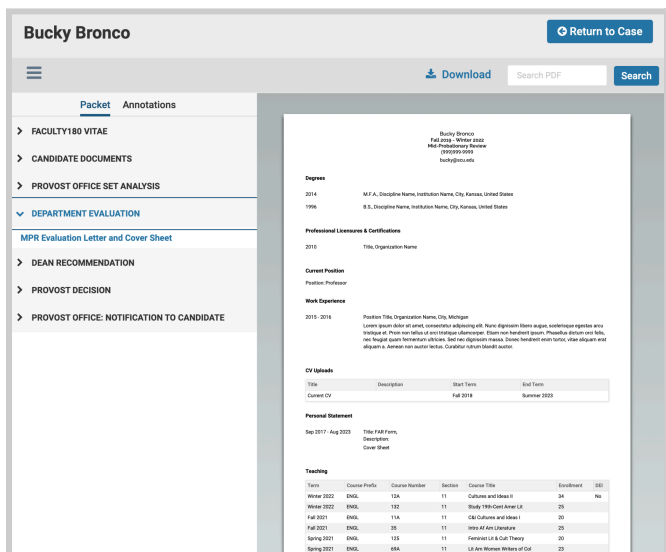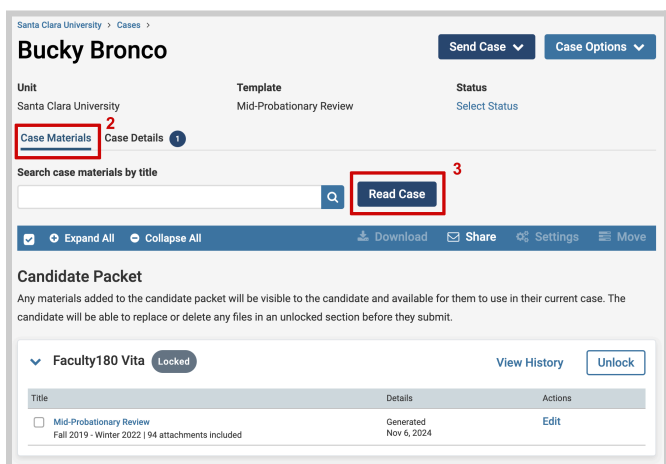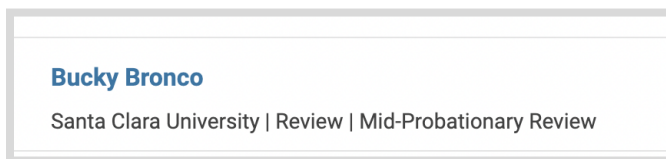
1. Click on the candidate's name in blue to bring you to the candidate's packet.

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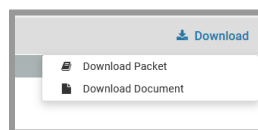
   In addition to the candidate's materials, the sections in the left sidebar include:

   ● Provost Office SET Analysis, providing an overview of the candidate's numerical evaluation scores for teaching, compared against the department and school averages

   ● Department Evaluation

   ● Dean Recommendation

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.

1. Click the **Case Details** tab at the upper left. The blue badge to the right of the Case Details tab indicates the number of outstanding required elements needed at this stage. For the Provost decision stage, there is one required form: Mid-Probationary Review - Provost Decision.

2. Click on the **Fill Out Form** link. Complete the form:
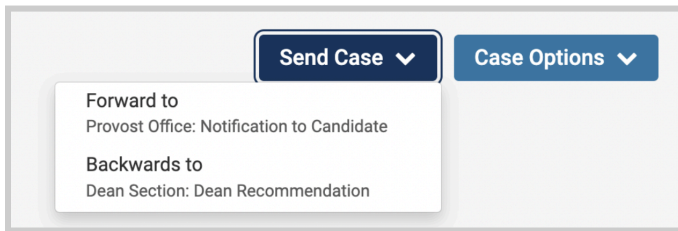
   a. Select your recommendation.

   b. Save your responses. This takes you to the prior screen. Click "Fill Out Form" again to return to this screen to submit the form.

   c. Submit the form.

Note: this brief form assists Provost's Office staff with tracking Provost recommendations and generating notices to candidates.
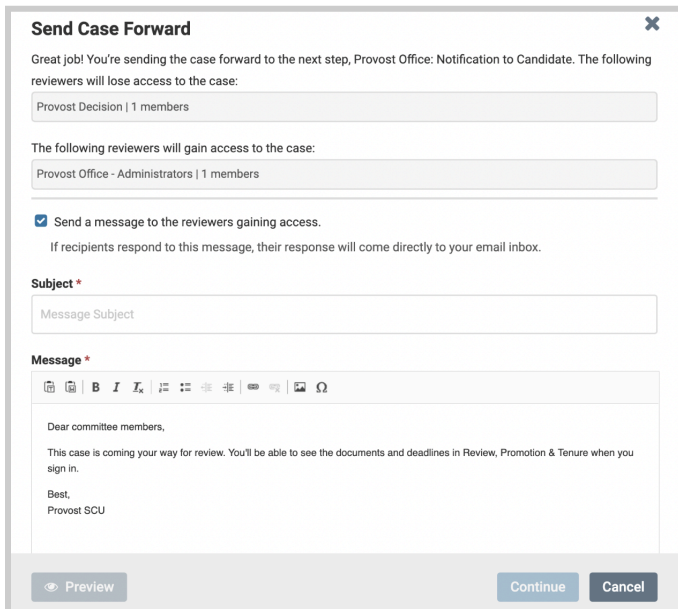
STEP 4 - SEND CASE FORWARD

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 reconsideration period has closed.

1. Click on the dark blue **Send Case** button in the upper right corner to forward the case to Provost Office staff.

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.