#### Promotion to Teaching Professor using Interfolio

#### Instructions for the Dean

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# **STEP 1 - LOGIN TO INTERFOLIO**

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





# В

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Sign In Sign in with email	Other Sign In Options	Sign in through your institution	THE JESUTI UNIVERSITY IN SELICON VALLEY
Emsil * Enter Email Password *	Sign in with Partner Institution	If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.	Login to Interfolio, Inc.
Enter Password Sign In		Santa Clara University Santa Clara University	Interfolio is designed to serve the committees that serve higher ed. It supp offering tools that streamline the logistics of collaboration, so scholars are make the decisions that drive higher ed.
Forgot your password?		Sign in	SCU Username e.g. BBronco
Don't have an account? Use Interfolio's suites of services to simplify Create an account	y your academic life.	Sign in with an interfolio account >	Password Passwords are case sensitive

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:

× 🏠 Santa Clara Uni	versity	Busky Bronco 🗸
Home Faculty180 Announcements & Help Profile Activities	My Tasks O Unread Tasks	O Read Tasks
Evaluations	Title Due Date	
Forms & Reports Vitas & Biosketches Find Colleagues Account Access	Looks like you're	all Caupit up. Nice.

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 DEPARTMENT RECOMMENDATION**

The dean is given access to the candidate's case through Interfolio when it is forwarded to the dean from the department. 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. You have access to these materials now, and will review them at a later stage. But at this stage, the only thing you need to review is the Department Report and Recommendation.
- The left sidebar lists the sections of the candidate packet. Click on the → (caret) symbol next to Department Review to expand the section and view the contents. Click on the Department Report and Recommendation. You'll see the document in the main window on the right.
- 6. To exit the case materials, click the blue **Return to Case** button in the top right.

## **STEP 3 - NOTIFY CANDIDATE & UPLOAD NOTIFICATION**

Add Cancel

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anta Clara University	Promotion to Teaching Professor	Select Status
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andidate Packet		
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<ul> <li>Faculty180 Vita Locked</li> </ul>		View History Unlock
Required Items required items must be completed before the case of	an advance to the next step. Files can be added by any C	Committee Manager or Administrator with access to this case.
an Notification to Candidate esse upload a PDF copy of the dean's letter or email i ward. Io files have been added to this section.	notification to the faculty member reporting whether the o	Separtment recommends or does not recommend that the case move
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**STEP 4 - SEND CASE FORWARD** 



- 1. Send a letter or email notification of the decision to the candidate. Create a PDF of it on your computer.
- 2. Click the **Case Details** tab at the upper left. This section will reveal the dean's required item: Dean Notification to Candidate.
- 3. Click on the **Add** button at the 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 "Dean Notification to Candidate." Then click the blue Add button (bottom right) to submit.
- If the department did not recommend promotion, please email Katie Williams outside of Interfolio and request that she suspend the case (<u>kfwilliams@scu.edu</u>).

- 1. If the department decision is positive, click on the dark blue **Send Case** button in the upper right corner to move the case to the School Committee.
- 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 initial steps.

## **STEP 5 - REVIEW THE CASE**

The dean is given access to the candidate's case through Interfolio when it is forwarded from the school committee. A trigger with the candidate's name will appear on your dashboard:

	Name 🗸	Type 🗢	Template Name	;	Status 🗢
	Bucky Bronco Santa Clara University	Promotion	Promotion to Te	aching Professor	
Ste	p 4 of 6: Dean Review 🛕 Requi	red Documents			
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			Details		Actions
Title	Promotion to Teaching Professor	ents included	Generated Aug 9, 202	4	Edit

Packet Annotations								
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Promotion to Teaching Professor				(999)999 bucky⊜se	9999 w.edu			
✓ Attachments from Promotion to Teaching Professor	Contact Inform	ation						
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> CV Uploads	Degrees							
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> Personal Statement	1995	8.8, Dis	cipline Name, Institution	Name, City, H	Cansas, United States			
> Teaching	Professional L	icensures & Certi	fications					
	2010	Title, Or	panization Name					
> Other Teaching	Current Positio							
Course Reduction or Overland	Position: Pro	lessor						
, ourse requiring overload	Work Experien	œ						
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> University, School, or Department Service	Teaching							
	Term Writer 2022	Course Prefix ENGL	Course Number 12A	Section 11	Course Title Cultures and ideas I		Enrollment 24	DE No
CANDIDATE DOCUMENTS	Winter 2022	ENGL	132	11	Study 19th Cent Amer Lit		25	
	Fall 2021	ENGL.	11A	11	C&I Cultures and Ideas I		20	
PROVOST OFFICE SET ANALYSIS	Fall 2021	ENGL.	35	11	Intro Af Am Uterature		25	
	Spring 2021	ENG.	125		reminal us & Cull Theory		20	
DEPARTMENT REVIEW								
Department Report and Recommendation								
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Promotion to Teaching Professor - Department Report								
Promotion to Teaching Professor - Department Report	Winter 2021	ENGL	12A	11	Cultures and Ideas II		18	

- 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 download an individual document, or the entire Faculty-180 Vitae packet, using the blue Download button in the



upper right of the browser window. You will re-

ceive an email when the down-load has completed.

In addition to the candidate's materials, the sections in the left sidebar include the Provost Office SET Analysis and the Department and School Committee reviews The SET Analysis provides a summary of course SET report averages with comparison to department and school averages for the period under review, excepting the initial online quarters during COVID (Winter and Spring 2020).

	G Return to Case
🛓 Download	Search PDF Search

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

#### **STEP 6 - COMPLETE THE REQUIRED FORM**

Rather than uploading a file, you will complete a form indicating your recommendation. You may wish to begin from a file that you can retain for your records, and paste your comments into the comment field.

Unit	Template	Status	
Santa Clara University	Promotion to Teaching Professor	Select Status	
Case Materials Case Details			
Search case materials by title			
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Candidate Packet			
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Any materials added to the candidate pa			unem

dean will fill out this form to indicate their recommendation, including com	ments about the case.
an Recommendation to Provost	
hat is the overall recommendation for the candidate? $\overset{*}{}$	
Highly Recommend	
Recommend	
Do Not Recommend	
Dr. Bronco's teaching performance has been extraordinary.	
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body p	
	57 / 8000 characte

1. Click the **Case Details** tab at the upper left. This section will reveal the dean's required form: Promotion to Teaching Professor - Dean Recommendation.

- 2. Click on the **Fill Out Form** link. Complete the form:
  - a. Select your recommendation.
  - b. Type or paste in your comments.
  - c. Save your responses. This takes you to the prior screen; click "Fill Out Form" to return to this screen to submit the form.
  - d. Submit the form.

### **STEP 7 - SEND CASE FORWARD**

S	end Case 🗸
Forward to	
Provost Decision	
Backwards to	
School Committee Review	
School Committee Review	
Send Case Forward	
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Send Case Forward Great job! You're sending the case forward to the next step, Provost Dec access to the case: Dean   1 members The following reviewers will gain access to the case:	sion. The following reviewers will lose

If recipients respond to this message, their response will come directly to your email inbox

Continue Cancel

Send a message to the reviewers gaining access.

Bronco case, Promotion to Teaching Professor

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This case is coming your way for review. You'll be able to see the documents and

Subject \*

Message \*

sign in. Best, Dean #1

body p

Dear Provost

Click on the dark blue **Send Case** button in the upper right corner to forward the case to the Provost Decision step.

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.