### Rank, Tenure and Promotion using Interfolio

#### Instructions for the University Rank & Tenure Committee

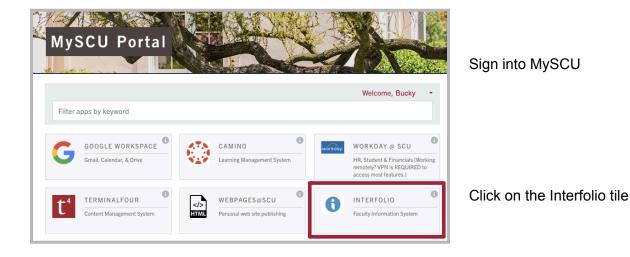
### Overview

	Step	Page
INTERFOLIO Faculty Information System	<ol> <li>Login to Interfolio Use the tile at the MySCU single sign-on portal.</li> </ol>	2
Read Case	2. Review the Case All committee members who are participating in the review read the case materials in Interfolio to inform their evaluation. A single evaluation with the individual votes is prepared in Google Drive.	3-4
The rer	naining steps are for the committee chair alone	
Case Details	<b>3. Upload Required Document to Case Details</b> The committee chair uploads a PDF of the final committee evaluation at the Case Details tab, at the required document placeholder.	4-5
Send Case 🗸	<ol> <li>Send Case Forward The committee chair sends the case forward to the Provost and President for the final stage of review.</li> </ol>	5

# **STEP 1 - LOGIN TO INTERFOLIO**

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





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Sign In		Sign in through your institution	THE JES	UIT UNIVERSITY IN SILICON VALLEY
Sign in with email	Other Sign In Options			
Email *	Sign in with Partner Institution	If your institution has partnered with Interfolio to provide Single Sign-On, search for	Login to Inter	folio, Inc.
Password *	G Sign in with Google	your institution name in the box below.	interfolio	
Enter Password		Santa Clara University	offering tools that str	to serve the committees that serve higher ed. It supports peer review eamline the logistics of collaboration, so scholars are better prepared
Sign In		Santa Clara University	make the decisions t	hat drive higher ed.
Forgot your password?		Sign In	SCU Username	e.g. BBronco
Don't have an account?		Sign in with an Interfolio account >	Password	Passwords are case sensitive
Use Interfolio's suites of services to simplif	y your academic life.			Login
Create an account				

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:

Home Faculty180 Announcements & Help	My Tasks	0		0	Search
Profile Activities		Unread Tasks		Read Tasks	
Evaluations	Title		Due Date		
Forms & Reports Vitas & Biosketches Find Colleagues Account Access		Lo	cks like you're all caught 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 CASE**

University committee members from a candidate's department will not participate in the candidate's case review at this stage (Faculty Handbook <u>3.4.4.6</u>) and will not see the candidate's name on their Interfolio dashboard. All other committee members will be given access to the candidate's case through Interfolio when it is forwarded to the university committee from the dean. For those participating, a trigger with the candidate's name will appear on your dashboard:

Name 🚽		Туре 🗢	Template Name 🗢
Bucky Bronco     Santa Clara University		Promotion	Tenure & Promotion
Step 5 of 7:	University Committee Review	w 🔺 Required Documents	
ome our Packets	Santa Clara University > Cases > Bucky Bronco		Send Case 🗸 Case Options 🗸
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- 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.
- Click the Read Case button 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.
- 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, us-

ing the blue Download button in the upper right of the browser window. You will receive an email when the download has completed.

Notes on the contents of left sidebar sections:

- **Candidate Materials** There will be a caret and section for every activity category for which the candidate has uploaded files. For candidates for promotion to Professor who elected the "modified process," you will find a link to their supporting evidence in their petition cover sheet (in "Attachments from Tenure & Promotion > Personal Statement"), and their annotated CV in "CV Uploads."
- **Provost Office SET Analysis** Provides a 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).
- DSS & External Referee Materials The dean's office has uploaded 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.
- Department Review Individual faculty letters, department meeting notes, and chair context letter.
- School Committee Review School Rank & Tenure Committee evaluation and recommendation.
- Dean Review The dean's evaluation and recommendation.

> DSS AND EXTERNAL REFEREE MATERIALS

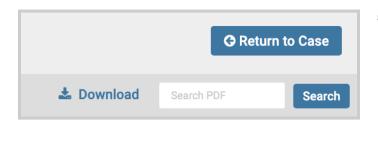
> DEPARTMENT REVIEW

> DECISION LETTER

SCHOOL COMMITTEE REVIEW
 DEAN REVIEW

> UNIVERSITY COMMITTEE REVIEW

> PROVOST REVIEW & PRESIDENT DECISION



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

You will collaborate on a written report summarizing the committee evaluation and member scores for the case. The report can be prepared and shared on Google Drive. When the letter is finalized, the committee chair will take the final step.

The remaining steps are for the chair alone

## **STEP 3 - UPLOAD REQUIRED DOCUMENT TO CASE DETAILS**

The committee chair will submit one required document at the Case Details tab: the Evaluation & Recommendation. The document should be converted to PDF and available on your computer before it is uploaded to Interfolio. The file name will appear in the sidebar for reviewers at subsequent stages, so please title it with that in mind.

ions, vote, and sign the

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Add

ague's case; they must be entirely

Unit Santa Clara University	Template Tenure & Promotion	Status Select	Status	
Case Materials Case Details 1				
Search case materials by title	٩	Read Case		
Collapse All		📩 Download	🖂 Share 🔅 Settings	📰 Move
Candidate Packet Any materials added to the candidate packet will be visit delete any files in an unlocked section before they subm		them to use in their current (	case. The candidate will be able to r	replace or
<ul> <li>Faculty180 Vita Locked</li> </ul>			View History	Unlock
Title		Details	Actions	
Tenure & Promotion     Fall 2017 - Summer 2024   95 attachments included		Generated Aug 5, 2024	Edit	

The University Committee reviews the case and submits a report of its evaluation and recommendation, with the results of secret balloting (with each me whole number score listed). Only those committee members outside the candidate's department may view the materials, be present in the room, participate in delibi report. Committee members from the candidate's department should not be assigned to the committee for their colleague's case; they m

1. Click the Case Details tab at the upper left. This section will reveal the committee's required item: Evaluation & Recommendation.

2. 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.

Rank, Tenure & Promotion using Interfolio
Instructions for the University Rank & Tenure Committee

Case Materials Case Details

Reviewing as University R and T Committee

Instructions

✓ Required Items

All required items must be com

Evaluation & Recommendation

Jpload a new file Select file from case	
Please select the section of the packet where t dropdown menu below.	nis file will appear. Select the appropriate section from the
Name *	Section *
Evaluation and Recommendation	<ul> <li>✓ Provost Office SET Analysis</li> <li>DSS and External Referee Materials</li> <li>Department Review</li> <li>School Committee Review</li> <li>Dean Review</li> <li>University Committee Review</li> <li>Provost Review &amp; President Decision</li> <li>Decision Letter</li> </ul>
	Add Can

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

# **STEP 4 - SEND CASE FORWARD**

Santa Clara University > Cases > Bucky Bronco		Send Case V Case	Options 🗸
Unit	Template	Provost Review & President Decision	
Santa Clara University	Tenure & Promotion	Backwards to Dean Review	
Case Materials Case Details			
Reviewing as			
University R and T Committee			

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

Send Case Forward	×
Great job! You're sending the case forward to the next step, Provost Review & President Decision. The following reviewers will lose access to the case:	
University R and T Committee   1 members	
The following reviewers will gain access to the case:	
Provost and President   1 members	
Subject *	
Message *	
$\fbox{$\widehat{\square}$} \textcircled{B} I I_x   \eqqcolon \eqqcolon \# \#   \circledast \circledast   \blacksquare \Omega$	
Preview     Continue     Cance	el

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.