

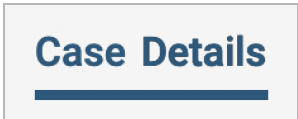




Faculty Activities Report using Interfolio

Instructions for the Dean

(CAS, ECP, ENG, LSB)

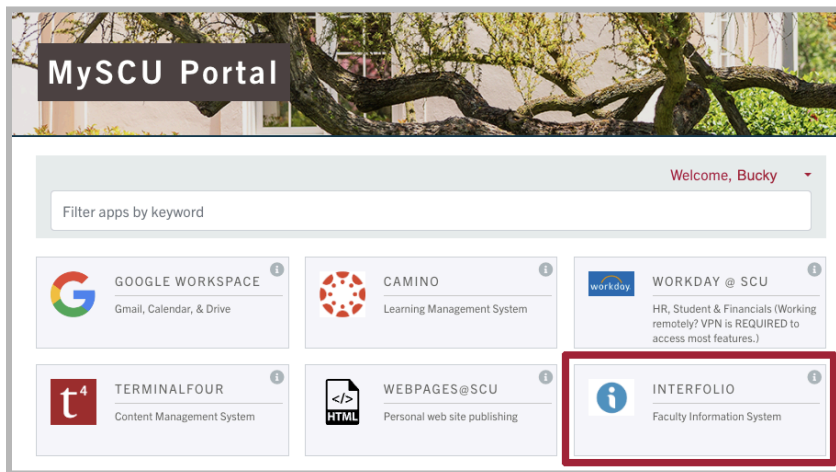
Overview

	Step	Page
 INTERFOLIO Faculty Information System	1. Login to Interfolio Use the tile at the MySCU single sign-on portal.	2
	2. Review the Case Read the case materials in Interfolio, including the Department's final FAR Evaluation Letter.	3
	3. Download the Vita & Letter Download the candidate's vita and the Department's final FAR Evaluation Letter for the faculty member's personnel file.	4
	3a. ENG: Share Letter with Faculty Engineering only: The Dean may choose to add their own letter and share it with the faculty member.	4-5
	4. Change Status of Case The Dean changes the status of the case to FAR: Complete.	6

STEP 1 - LOGIN TO INTERFOLIO

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

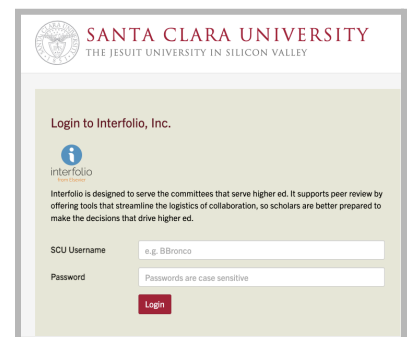
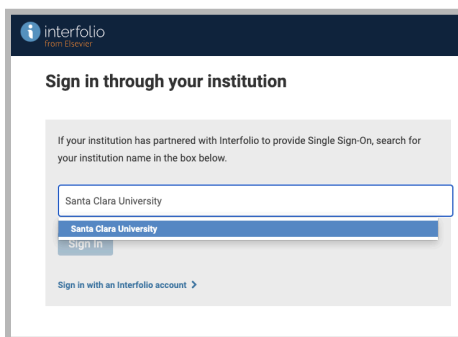
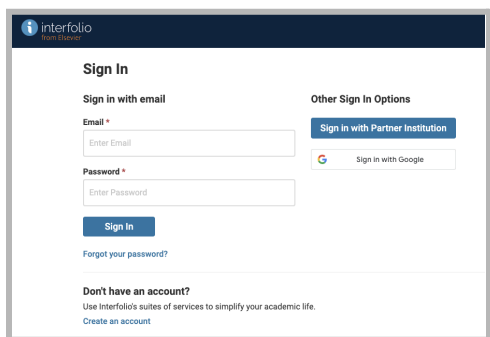
A



Sign into MySCU

Click on the Interfolio tile

B

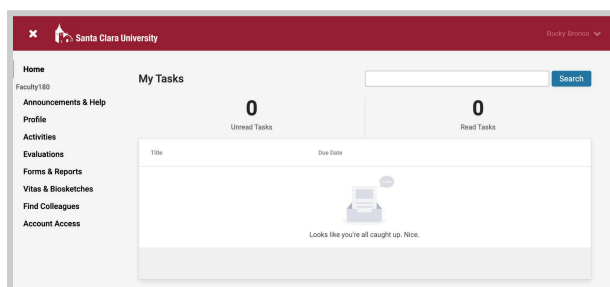


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

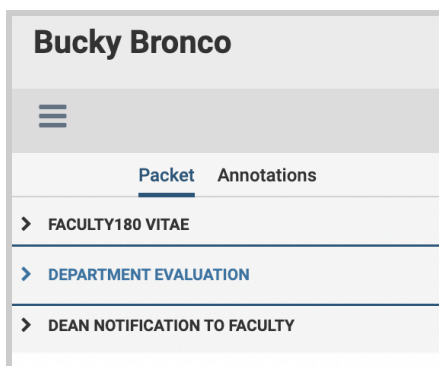
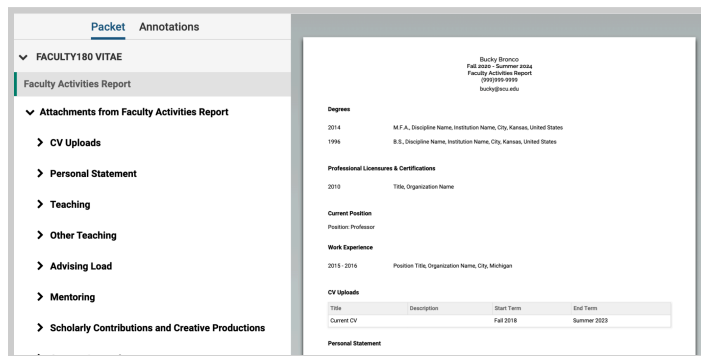
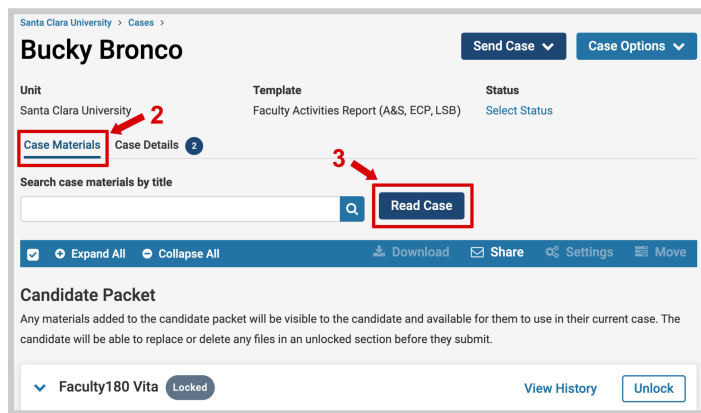
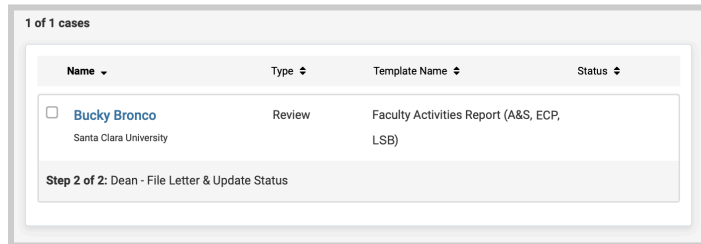
However you login, double-check that you're in the right account:



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.

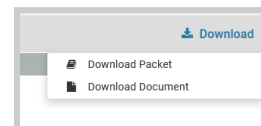
STEP 2 - REVIEW THE CASE

In CAS and ECP, the Associate or Assistant Dean will be given access to the case as part of the department committee, to assist with the drafting of the department's FAR Evaluation Letter in Google Drive. In all schools, the department will upload the final letter to Interfolio and forward the case to 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.

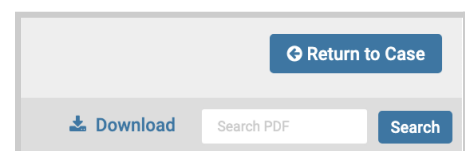
You can also download an individual document, or the entire Faculty180 Vitae packet, using the blue **Download** button in the upper right of the browser window.



You will receive an e-mail when the download has completed.

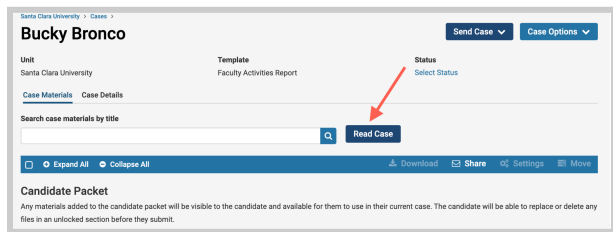
You will find the department's final evaluation letter in the left sidebar, along with the form indicating the merit scores/weights (teaching-track and tenure-track) or overall evaluation (fixed-term faculty).

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

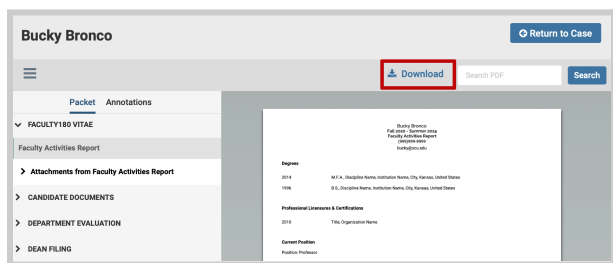


STEP 3 - DOWNLOAD THE VITA & LETTER

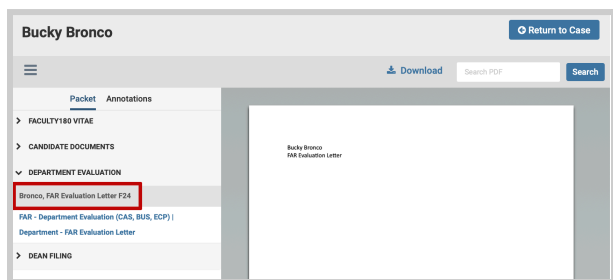
The Associate or Assistant Dean downloads the FAR Vita and FAR Evaluation letter for the faculty member's personnel file.



1. With the Case Materials tab selected, click the blue **Read Case** button.



2. The Vita appears in the main browser window. Click the blue Download button. Select "Download Document" to download the Vita.

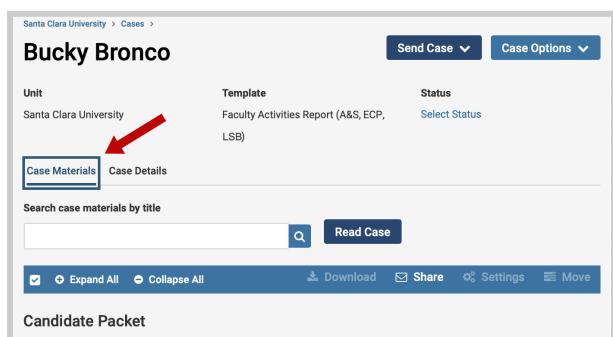


3. Click the caret next to Department Evaluation in the left sidebar to reveal the final Department FAR Evaluation Letter and scoring form. Select the letter, and then click "Download" (and "Download Document") to download the letter for the faculty member's personnel file.

STEP 3a - ENG: Share Letter with Faculty

In the School of Engineering (only), the Dean may add a letter of their own to the faculty member's case and share it with the faculty member.

Engineering: To Add the Dean's Letter (optional)



1. Select the Case Materials tab. Scroll down to the Internal Sections to the "Dean Filing" section.

Internal Sections

These sections are available to committee members reviewing the case and cannot be viewed by the candidate. Please note that some materials added to internal sections can be shared with the candidate by an administrator or committee manager.

> Department Evaluation Edit Add File

▼ Dean Filing Edit Add File

The Dean's Office records the final evaluation in the personnel file and updates the status of the case to "FAR: Complete." In the Leavay School of Business, the dean shares the evaluation letter with the faculty member; in other schools, this is done by the chair.

Materials

No files have been added to this section.

2. Click the "Add File" button. Browse your computer for the file, and upload it. The letter will now appear in the internal section.

▼ Dean Filing Edit Add File

The Dean's Office records the final evaluation in the personnel file and updates the status of the case to "FAR: Complete." In the Leavay School of Business, the dean shares the evaluation letter with the faculty member; in other schools, this is done by the chair.

Materials

Title	Details	Actions
<input type="checkbox"/> Bronco, Dean Letter	Added by Dean #1 Sep 17, 2024	Edit

Share Letter with Faculty

The department chair is responsible to share the department evaluation letter with the faculty member, either in hard copy, via email, or by sharing it in Interfolio. If the Dean of the School of Engineering writes their own review, they also may share the letter in the same manner.

If you choose to share the dean letter from within Interfolio, here are the steps:

Bucky Bronco Send Case Case Options

Unit: Santa Clara University Template: Faculty Activities Report Status: Select Status

Case Materials Case Details

Search case materials by title Read Case

Expand All Collapse All Download Share Settings Move

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

▼ Faculty180 Vita Locked View History Unlock

Title	Details	Actions
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1. Click the **Case Materials** tab at the upper left.

Bucky Bronco Send Case Case Options

Unit: Santa Clara University Template: Faculty Activities Report Status: Select Status

Case Materials Case Details

Search case materials by title Read Case

Expand All Collapse All Download Share Settings Move

Candidate Packet

Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.

▼ Faculty180 Vita Locked View History Unlock

Title	Details	Actions
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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 Dean's Letter from the Dean Filing section. **DO NOT** select the other uploaded documents or the "Select All" button. Then click the blue **Send** button to share the letter with the faculty member. A message will pop up briefly to indicate that the message has been successfully shared with the faculty member.

Message to Candidate

To: Bucky Bronco (bucky@scu.edu)

Subject:

Message:

Details: Direct email reply: test.dean1.scu@interfolio.com

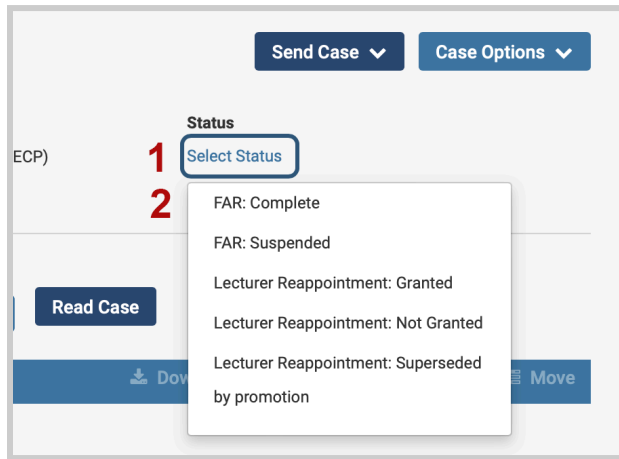
Share Files

Files shared with this message can be viewed by the candidate after logging into Interfolio.

Add

STEP 4 - CHANGE STATUS OF CASE

Change the status of the case to “FAR: Complete.” This indicates to Provost Office staff that the Dean’s Office has completed its 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).