Mid-Probationary Review using Interfolio

Instructions for the Department

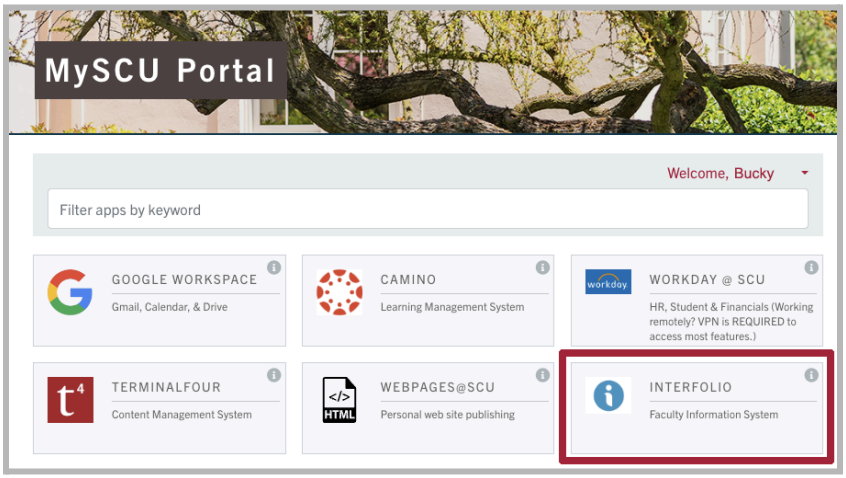
Overview

Step	Page
1. Login to Interfolio Use the tile at the MySCU single sign-on portal.	2
2. Review the Case All tenured faculty who are participating in the review read the case materials in Interfolio to inform their evaluation. The group meets to discuss and vote on the case, and drafts a single evaluation that all participating faculty sign. The evaluation may be shared on Google Drive while it is being drafted and discussed.	3-4
The remaining steps are for the process chair alone	
3. Complete Required Steps You will upload one required document (the final written evaluation and cover sheet with signatures of participating faculty).	4
4. Send Case Forward Send the case forward to the dean for the next stage of review.	5

STEP 1 - LOGIN TO INTERFOLIO

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

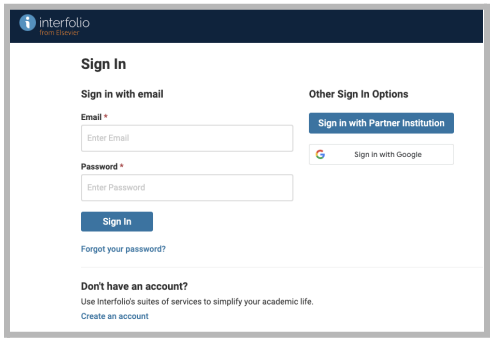
A

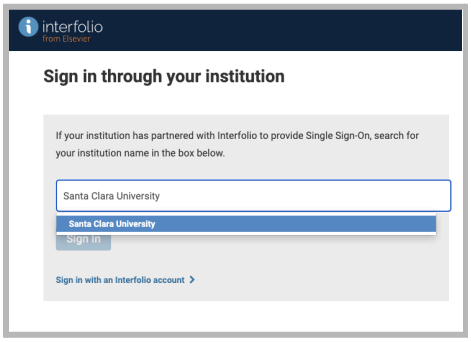


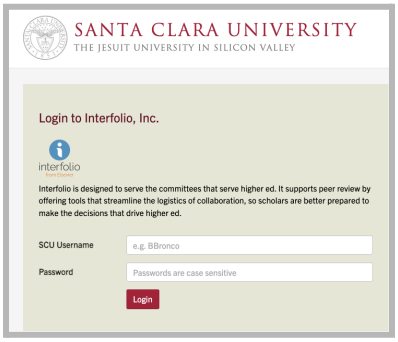
Sign into MySCU

Click on the Interfolio tile

B





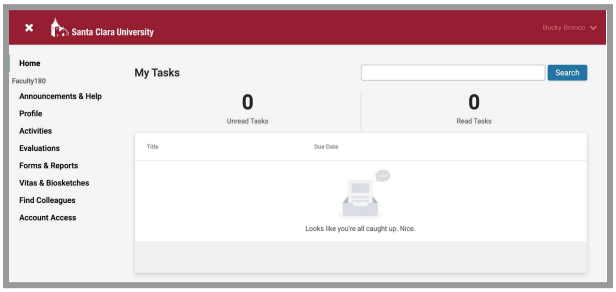


Go to https://www.scu.edu/interfolio

Type in Santa Clara University

Log in to MySCU Portal

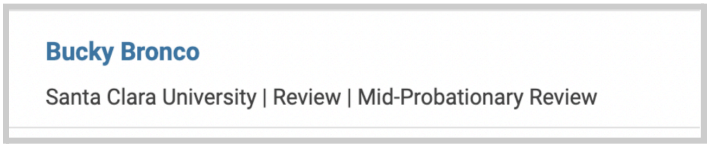
However you login, double-check that you're in the right account:

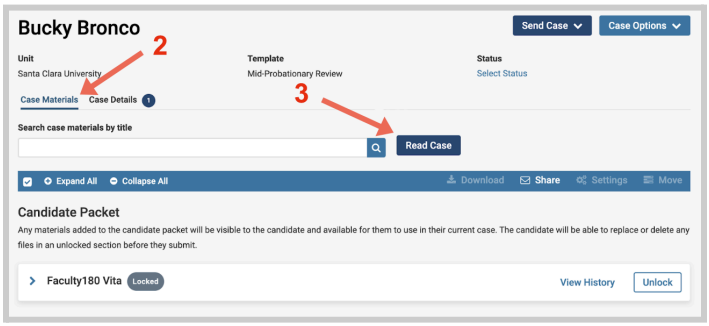


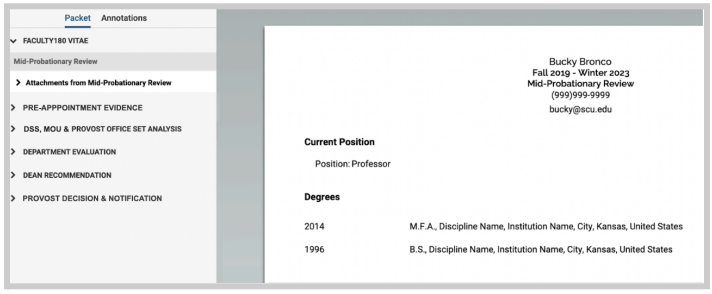
After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this. If it doesn't, you may be logged in to another Interfolio account. Contact Katie Williams (kfwilliams@scu.edu) to help you troubleshoot.

STEP 2 - REVIEW THE CASE

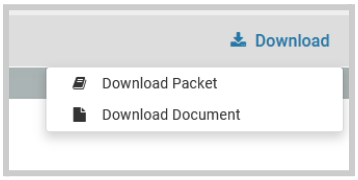
All tenured faculty participating in the review will be given access to the candidate's case materials through Interfolio when the candidate submits their case. A trigger with the candidate's name will appear on your dashboard:





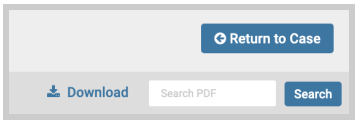


1. Click on the candidate's name in blue to bring you to the candidate's packet.
2. Select the Case Materials tab (upper left) of the candidate packet.
3. Click the dark blue Read Case button on the right to review the candidate's packet.
4. The left sidebar lists the sections of the candidate packet. 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. In addition to the candidate's materials, the sections in the left sidebar include the **DSS, MOU** and **Provost Office SET Analysis**. Please refer to this version of the discipline-specific scholarship standards when evaluating the case**.** An MOU will only be included if a faculty member had one in place at the time of hire.



The Provost Office SET Analysis provides a summary of course SET report averages and comparison to department and school averages for the period under review, except for the initial online quarters during COVID (Winter and Spring 2020).

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.



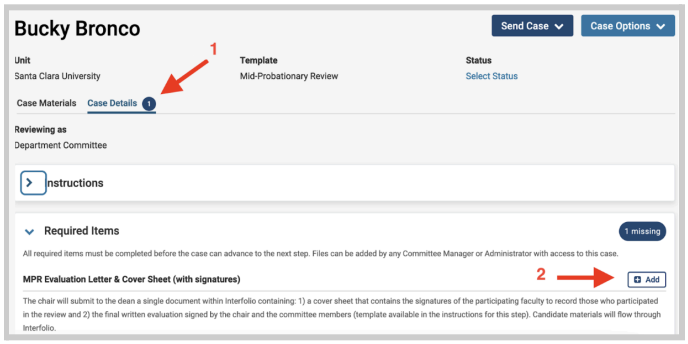
5. To exit the case materials, click the blue **Return to Case** button in the top right.

The department will review the candidate's materials, meet to discuss them and prepare a single evaluation that the process chair will upload to Interfolio. This evaluation may be shared and edited in Google Drive, and participants may sign the final form electronically or manually. A template for the evaluation and cover sheet for the signatures of participating faculty is available online and in the Interfolio instructions for the department.

The remaining steps are for the process chair alone

STEP 3 - COMPLETE REQUIRED STEPS

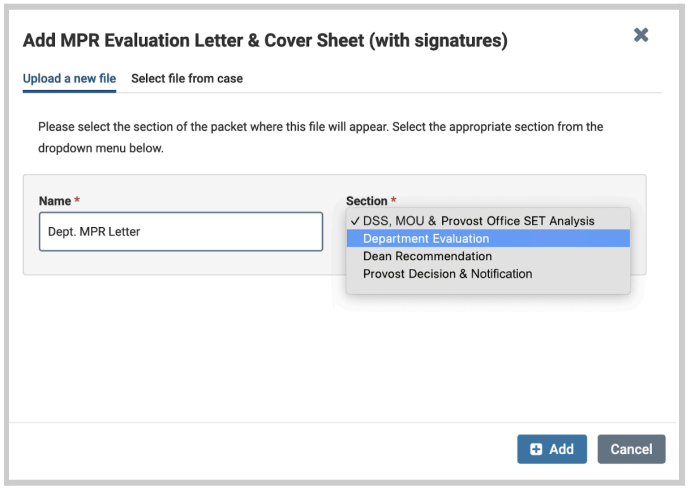
The department or process chair will submit one required document at the Case Details tab. There is only room for a single uploaded file, so the signature page should be merged into one file with the department report before a PDF is uploaded to Interfolio. Have the file available on your desktop to facilitate uploading to Interfolio. The file name will appear in the sidebar for reviewers at subsequent stages, so please title it with that in mind.



1. Click the **Case Details** tab at the upper left. This section will reveal the department's required item, the MPR Evaluation Letter & Cover Sheet (with signatures). This should be one single PDF file, since only one document can be uploaded at this location.

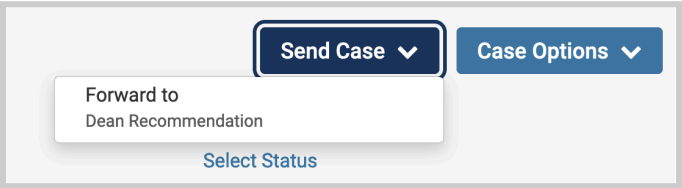
2. Click on the **Add** button next to the required item to upload the MPR Evaluation Letter & Cover Sheet (with signatures). A pop-up window will allow you to browse your computer for the report.

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

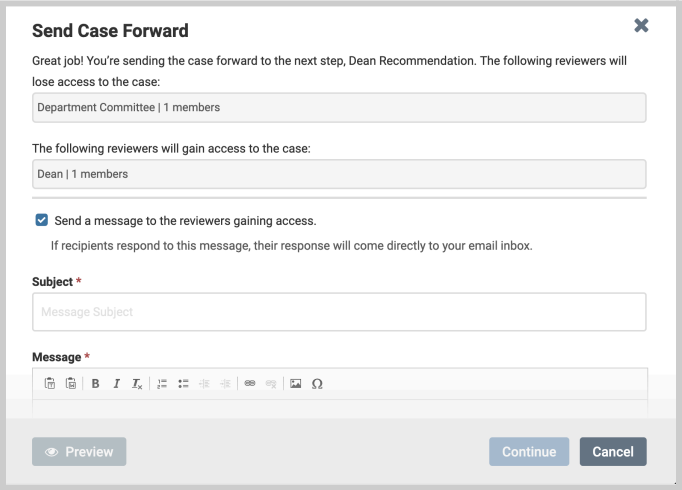


STEP 4 - SEND CASE FORWARD

The final step is to send the case forward to the dean.



Click on the dark blue **Send Case** button in the upper right corner to move the case to the Dean.



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.