Mid-Probationary Review using Interfolio

Instructions for the Provost

Overview
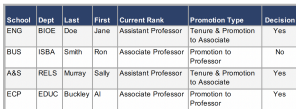
Step	Page

Provost & Vice Provost

1. Login to Interfolio
Use the tile at the MySCU single sign-on portal.

Page: 2

2. Review the Cases
Read the case materials in Interfolio to inform your decision.

Page: 3

3. Convey Decisions to Provost Staff
After discussing the cases with the President, the Provost conveys the President's decisions to the Director of Faculty Personnel outside Interfolio.

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Provost Office Staff

4. Notify Candidate and Upload Decision Letter
Send the decision letter to the candidate and upload the letter to the "required document" at the Case Details tab.

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5. Fill Out the Required Form
Fill out the required form at the Case Details tab indicating the Provost's decision.

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6. Change the Status of the Case
For successful cases, and for unsuccessful cases after the period for appeal has passed, change the status of the case to reflect the Provost's decision. This will alert the Faculty Affairs team to close the case.

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STEP 1 - LOGIN TO INTERFOLIO
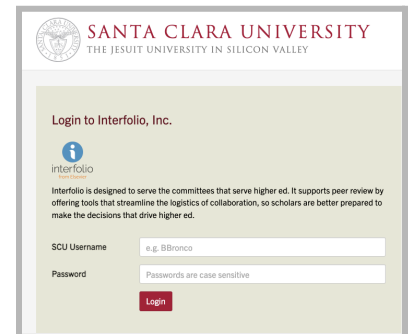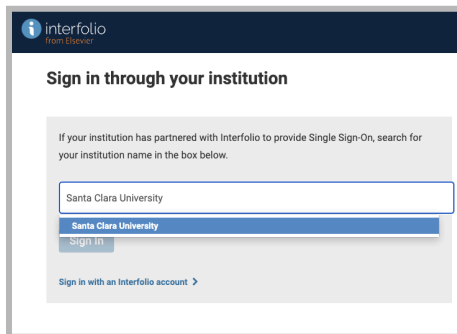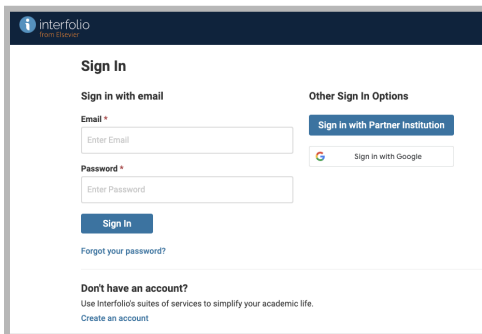
You can login to Interfolio one of two ways (A or B):
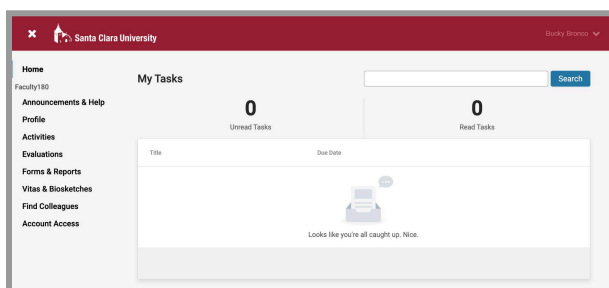
A
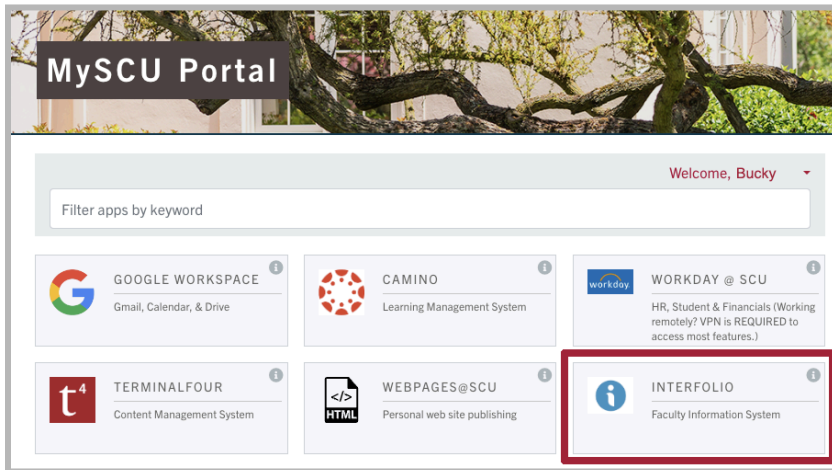
Sign into MySCU

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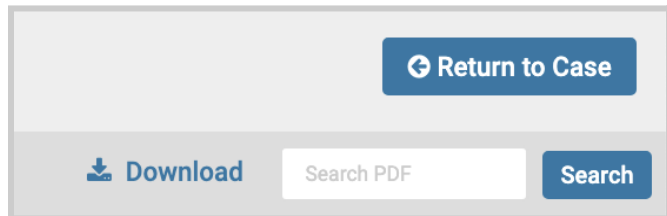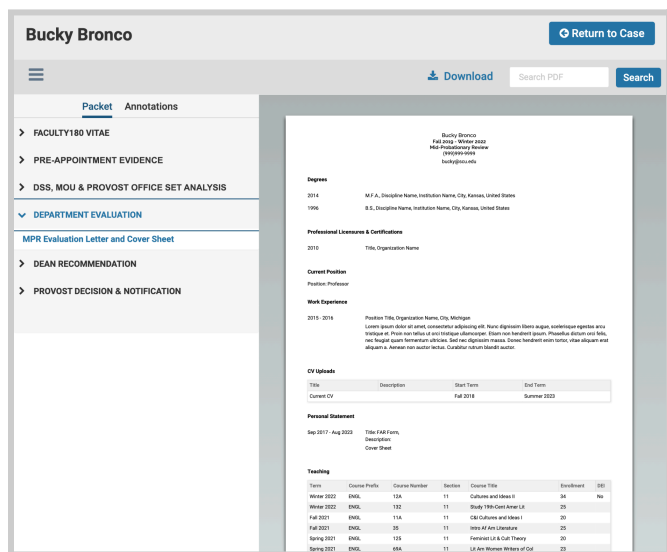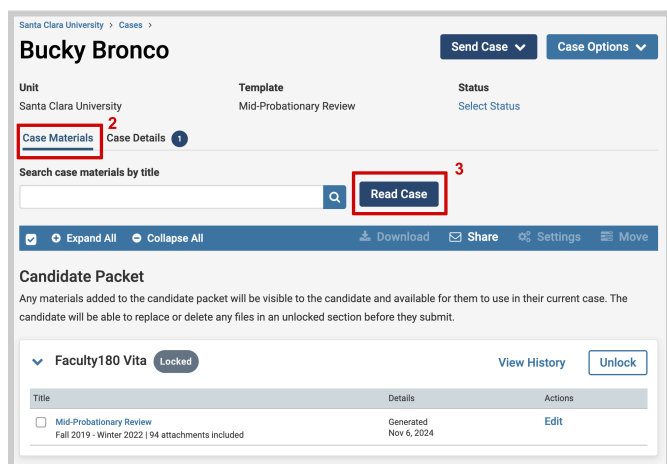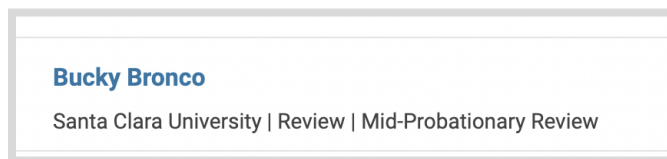
1. Click on the candidate's name in blue to bring you to the candidate's packet.

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.
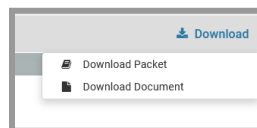
   In addition to the candidate's materials, which may include pre-appointment evidence, the sections in the left sidebar include:

   - DSS, MOU & Provost Office SET Analysis: includes the version of the scholarship standards selected by the candidate, an MOU allowing pre-appointment evidence (if one exists), and the 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.
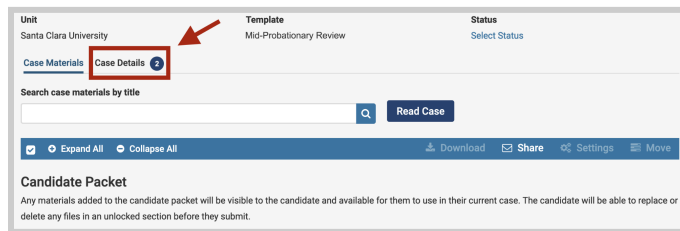
STEP 3 - CONVEY DECISIONS TO PROVOST STAFF

The Senior Manager for Faculty Affairs will prepare a spreadsheet listing all of the candidates for tenure and/or promotion and share it with the Provost Committee on Google Drive (there is a link to the sheet in the Interfolio directions for this step). The Vice Provost for Academic Affairs will review the cases and log the recommendations at the department and dean stages of review on the spreadsheet, adding notes as necessary. The Vice-Provost and Provost will discuss the cases, and the Provost's decision on each case will be added to the spreadsheet. The Provost or Vice Provost will notify the Director of Faculty Personnel when the spreadsheet is complete.

School	Dept	Last	First	Current Rank	Template	Department	Dean	PROVOST'S Decision
ENG	BIOE	Doe	Jane	Assistant Professor	Mid-Probationary Review	Yes	Yes	Yes
BUS	ISBA	Smith	Ron	Assistant Professor	Mid-Probationary Review	No	No	No
A&S	RELS	Murray	Sally	Assistant Professor	Mid-Probationary Review	Yes	Yes	Yes
ECP	EDUC	Buckley	Al	Assistant Professor	Mid-Probationary Review	No	Yes	Yes

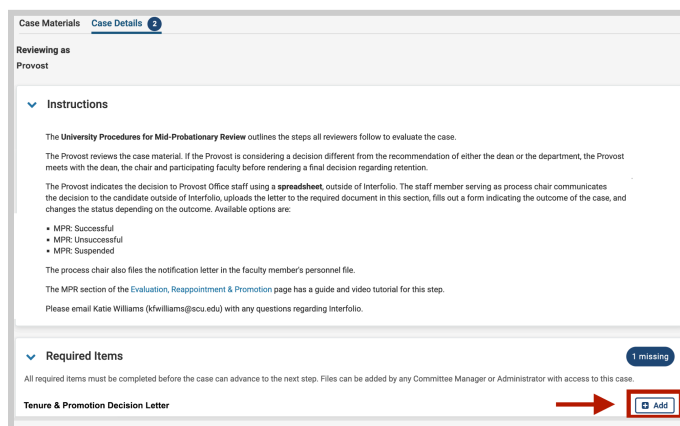**The remaining steps are for the Provost Office staff**

STEP 4 - NOTIFY CANDIDATE AND UPLOAD DECISION LETTER

Provost Office staff will draft decision letters and email them to each candidate, and then upload the letter to the case.
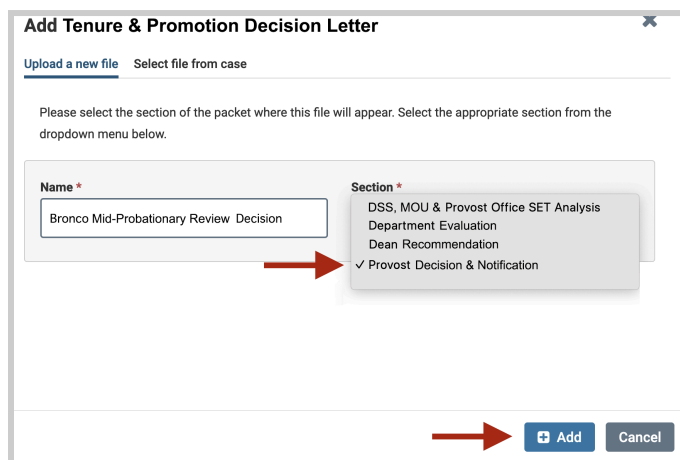

1. Click the **Case Details** tab at the upper left. This section will reveal the two required items at this step (note the blue badge with the number of required items on the tab): Mid-Probationary Review Decision Letter (required document) and Mid-Probationary Review - Provost Decision (required form). In this step, you'll upload the required *document*; in Step 5, you'll fill out the required *form*.

2. Open the "Required Items" section by clicking on the caret to the left of the title. Click on the **Add** button to the right of the "Mid-Probationary Review Decision Letter" to upload the file. A pop-up window will allow you to browse your computer for the document.

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

STEP 5 - FILL OUT THE REQUIRED FORM

You will fill out one required form indicating the outcome of the case.

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. There should be a "1" rather than a "2" there now that you've uploaded the required document. The outstanding requirement is the required form indicating the Provost's decision: "Mid-Probationary Review - Provost Decision."

2. Click on the **Fill Out Form** link. Complete the form on behalf of the Provost:

   a. Select their recommendation.

   b. You may choose to save their responses, but this is not required. If you do click this button, you will go back to the prior screen. Click "Fill Out Form" again to return to this screen to submit the form.

   c. Submit the form.

   Note: This form allows the Faculty Affairs team to pull a report of all outcomes.

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STEP 6 - CHANGE THE STATUS OF THE CASE

Change the status of the case to indicate the Provost's decision. This indicates to the Faculty Affairs team that all steps have been completed. Faculty Affairs will close the cases after the period for appeal closes.
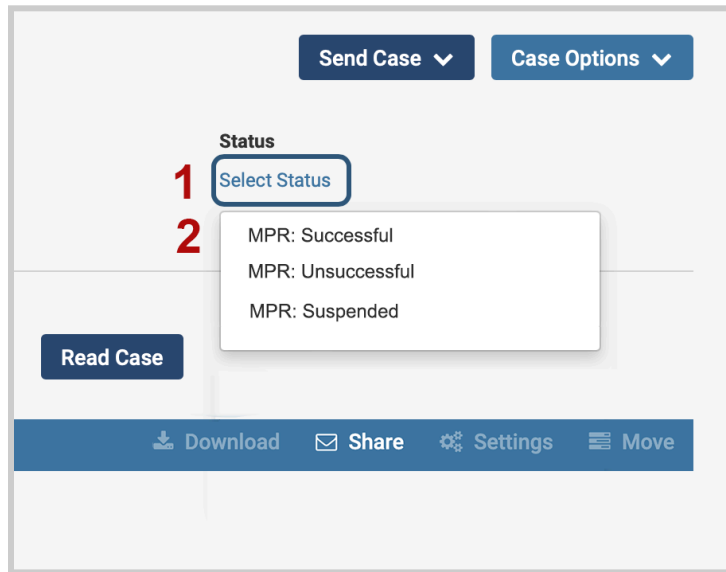
1. Click **Select Status**

2. From the pop-up window, select the status that is appropriate to the resolution of the case.

You have completed all necessary steps for the case.