

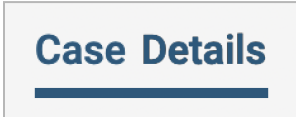



Mid-Probationary Review using Interfolio

Instructions for the Provost

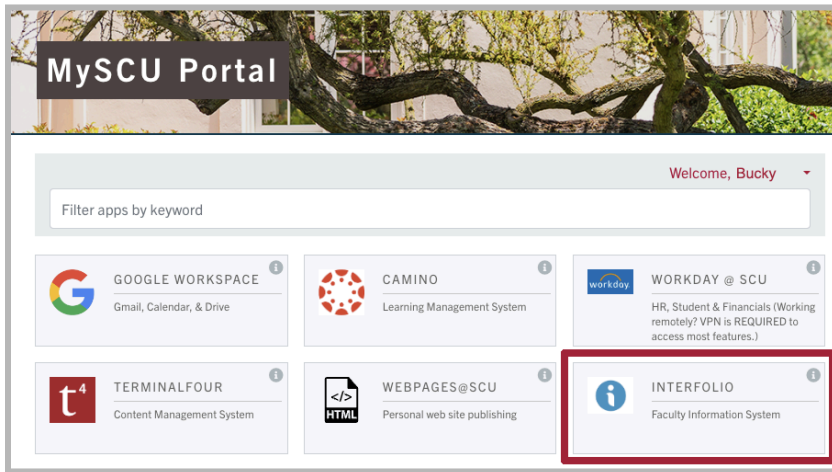
Overview

	Step	Page
	1. Login to Interfolio Use the tile at the MySCU single sign-on portal.	2
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	3. Complete Required Form The Provost fills out a form at the Case Details tab indicating their decision.	4
	4. Send Case Forward The Provost sends the case forward to Provost Office staff to notify the candidate of the decision, and to close the case after the period for reconsideration has closed.	5

STEP 1 - LOGIN TO INTERFOLIO

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

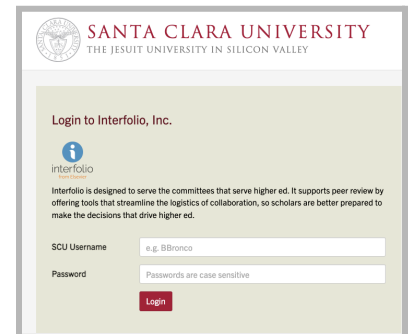
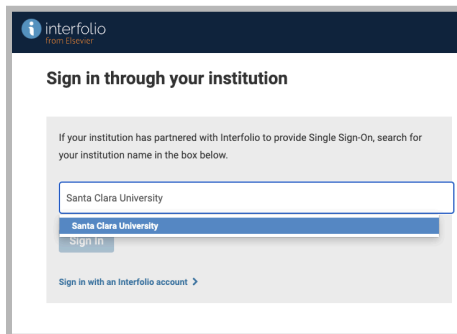
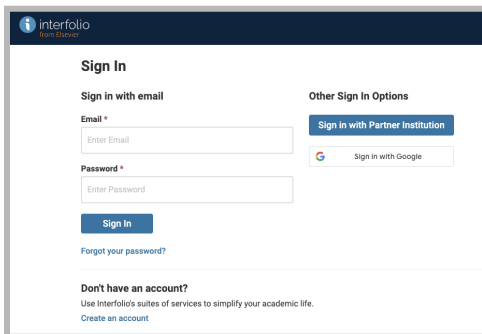
A



Sign into MySCU

Click on the Interfolio tile

B

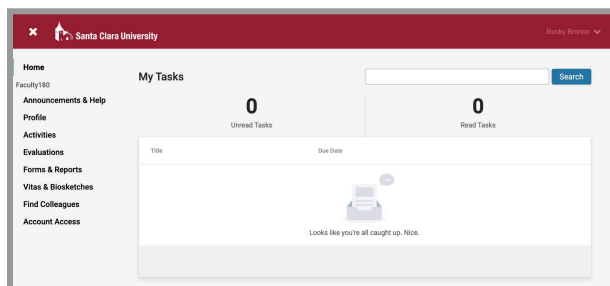


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

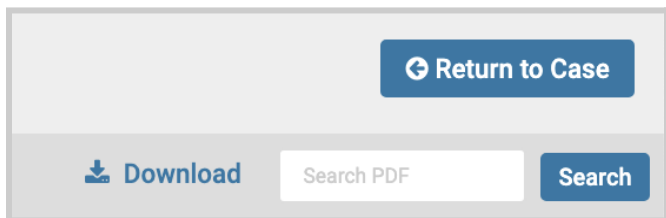
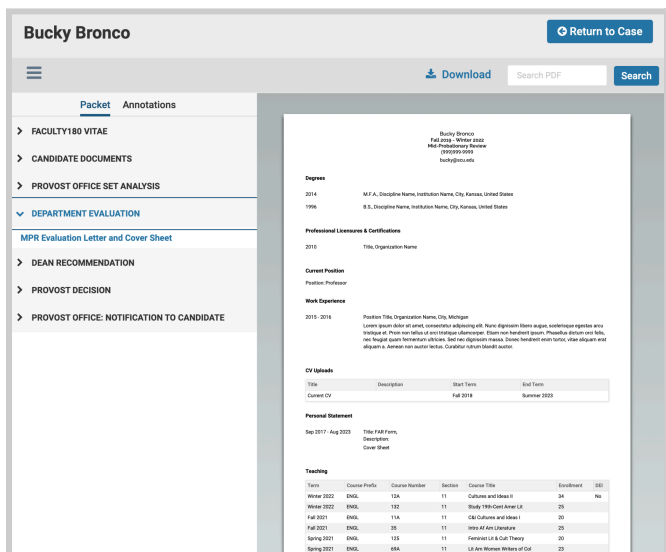
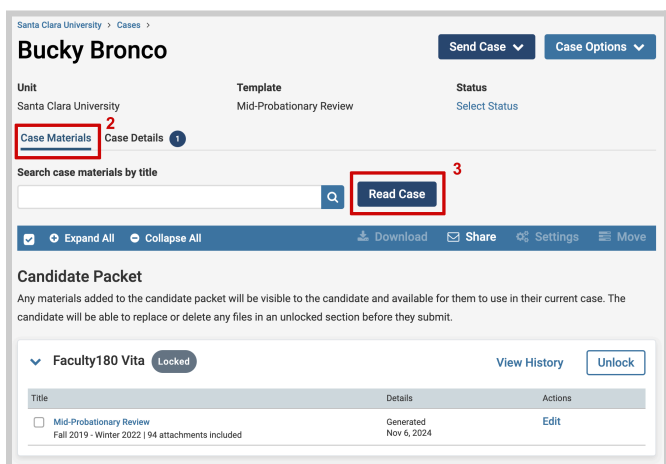
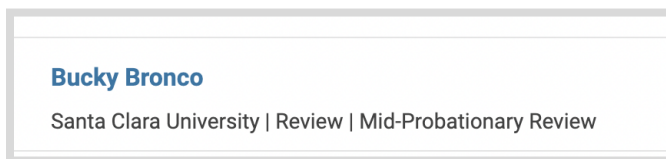
However you login, double-check that you're in the right account:



After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this (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).

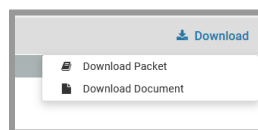
STEP 2 - REVIEW THE CASE

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, the sections in the left sidebar include:

- Provost Office 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 - COMPLETE THE REQUIRED FORM

Rather than uploading a file, you will complete a form indicating your recommendation. If you plan to add comments, you may wish to begin from a file that you can retain, and paste your comments from that document into the comment field in the form.

Santa Clara University > Cases >

Bucky Bronco

Send Case Case Options

Unit: Santa Clara University | Template: Mid-Probationary Review | Status: Select Status

Case Materials | **Case Details 1**

Search case materials by title

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
<input type="checkbox"/> Mid-Probationary Review Fall 2019 - Winter 2022 94 attachments included	Generated Nov 6, 2024	Edit

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. For the Provost decision stage, there is one required form: Mid-Probationary Review - Provost Decision.

Bucky Bronco

Send Case Case Options

Unit: Santa Clara University | Template: Mid-Probationary Review | Status: Select Status

Case Materials | **Case Details 1**

Reviewing as
Provost Decision

Instructions

Required Items 1 missing

All required items must be completed before the case can advance to the next step. Forms must be completed by the assigned user, however a Committee Manager or Administrator can select to omit the form as a requirement for a user.

Form Name	Assignee	Actions
Mid-Probationary Review - Provost Decision 1 required questions	Committee Managers	Manage Responses
Mid-Probationary Review - Provost Decision 1 required questions	Provost (You)	Fill Out Form

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

Mid-Probationary Review - Provost Decision

Do you recommend retention for this candidate? *

Yes **a**

No

c **b**

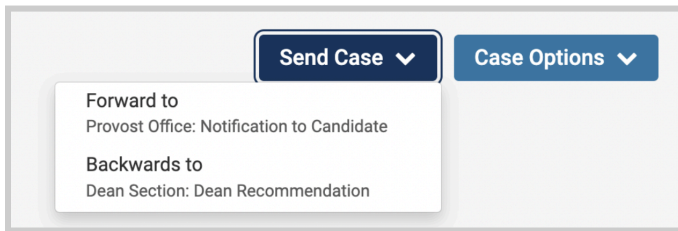
Submit Form Save Responses Return to Case

- a. Select your recommendation.
- b. Save your responses. This takes you to the prior screen. Click "Fill Out Form" again to return to this screen to submit the form.
- c. Submit the form.

Note: this brief form assists Provost's Office staff with tracking Provost recommendations and generating notices to candidates.

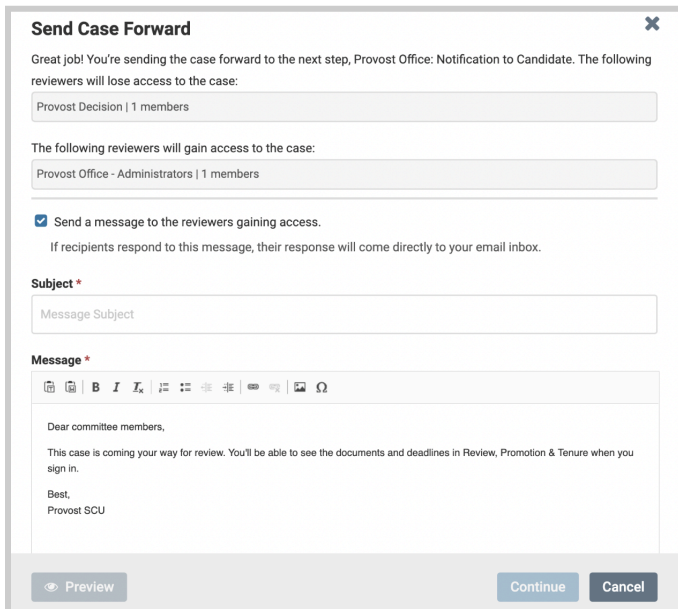
STEP 4 - SEND CASE FORWARD

You will now send the case to the Director of Faculty Personnel to draft the decision letter for the candidate. Provost Office staff will close the case when the reconsideration period has closed.



A screenshot of a software interface showing a dark blue button labeled "Send Case" with a downward arrow. Below it is a dropdown menu with two items: "Forward to" with the subtext "Provost Office: Notification to Candidate" and "Backwards to" with the subtext "Dean Section: Dean Recommendation". To the right of the "Send Case" button is another button labeled "Case Options" with a downward arrow.

1. Click on the dark blue **Send Case** button in the upper right corner to forward the case to Provost Office staff.



A screenshot of a "Send Case Forward" dialog box. At the top, it says "Great job! You're sending the case forward to the next step, Provost Office: Notification to Candidate. The following reviewers will lose access to the case:" followed by a text field containing "Provost Decision | 1 members". Below that, it says "The following reviewers will gain access to the case:" followed by a text field containing "Provost Office - Administrators | 1 members". There is a checked checkbox labeled "Send a message to the reviewers gaining access." with a note: "If recipients respond to this message, their response will come directly to your email inbox." Below this is a "Subject *" field containing "Message Subject". At the bottom is a "Message *" field with a rich text editor toolbar and the following text: "Dear committee members, This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in. Best, Provost SCU". At the bottom of the dialog are three buttons: "Preview", "Continue", and "Cancel".

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 submission.