Rank, Tenure and Promotion using Interfolio

Instructions for the Dean Partner

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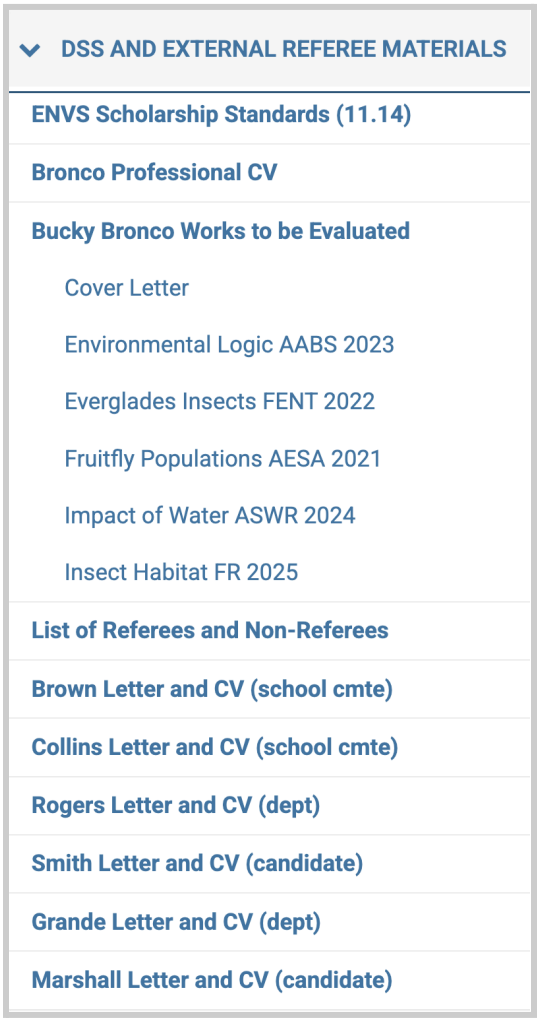
STEP 1 - PREPARE DOCUMENTS FOR UPLOAD

In spring and through the summer before the petition deadline, you will be collecting materials supplied by the candidate for external referees, as well as referee letters and CVs. These should be converted to PDF if not already in that format. Since the file name and bookmarks in a PDF will all appear in the sidebar of the case for subsequent reviewers, we recommend (but do not require) that you take the following steps to prepare the files for upload.



1. **Discipline-specific scholarship standards**. GDrive ƒ E. No changes need to be made; all files from the Provost's website already have a consistent naming convention:

   ENVS Scholarship Standards (11.16)

2. **MOU**.[1] For faculty who have an MOU from the time of hire, use the naming convention:

   Lastname MOU

3. Professional ***Curriculum Vitae*** (GDrive ƒ D). Remove bookmarks from the PDF (if there are any) and use the naming convention:

   Lastname Professional CV

4. **Works to be Evaluated** (GDrive ƒ C). Remove bookmarks from each file and rename each using the following naming convention:

   Journal: **Short Title JOURNALABBR year**
   Bk Chptr: **Short Title (chptr) year**
   Book: **Short Title (book) year**

   Combine files into a single PDF in either alphabetical or date order. Add a bookmark at the start of each original file using the file name convention above. Save this combined file as:

   FirstName LastName Works to be Evaluated

5. **List of Referees and Non-Referees** (GDrive ƒ B). Combine candidate, department and school committee documents into one PDF file (no bookmarks needed). Naming convention:

   List of Referees and Non-Referees

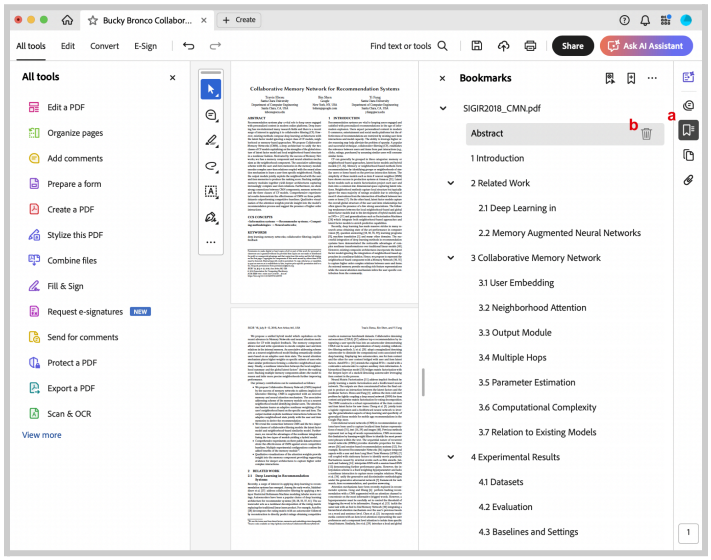
6. **External referee letters** (GDrive ƒ B). Create a combined file for each referee, with the letter first and the CV after. For the source of the list, use "candidate" or "department" or "school cmte" in parentheses. The full naming convention is:

   LastName Letter and CV (department)

[1] A small number of tenure-track hires appointed in 2023 and 2024 have a signed memorandum of understanding from the time of hire indicating that they could petition for tenure early and use some period of pre-appointment scholarship in their tenure petition. As of Fall 2025, this allowance became standard, making future MOUs unnecessary.

Acrobat Tips

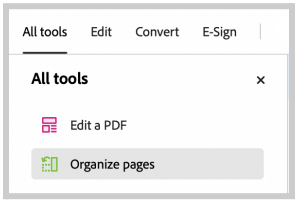
Removing Bookmarks & Creating a Single PDF File from Multiple Files

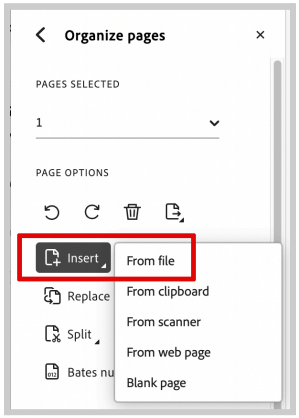


1. Remove all bookmarks from the files that will be merged. In each document,
   a. click the bookmark tool to reveal the bookmarks in the file.
   b. use the trash can next to each bookmark or group of bookmarks to delete them.

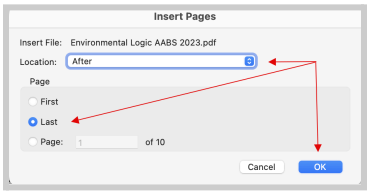
2. Open the first file in the group. For the works sent out to external referees, this will either be the dean's cover letter template to the referees or the first scholarship/creative activity sample. Save this file as:

   FirstName LastName Works to be Evaluated



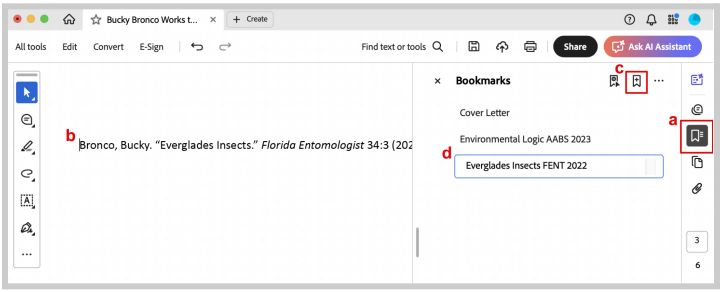


3. Use the **Organize** pages tool to **Insert** > **From file**. Browse for the second document in the series, and select **After** and **Last**, and click **OK**.



4. Continue this for each of the files in turn until all the works sent out for external referee review are in this single document, then save the file.

Adding Bookmarks

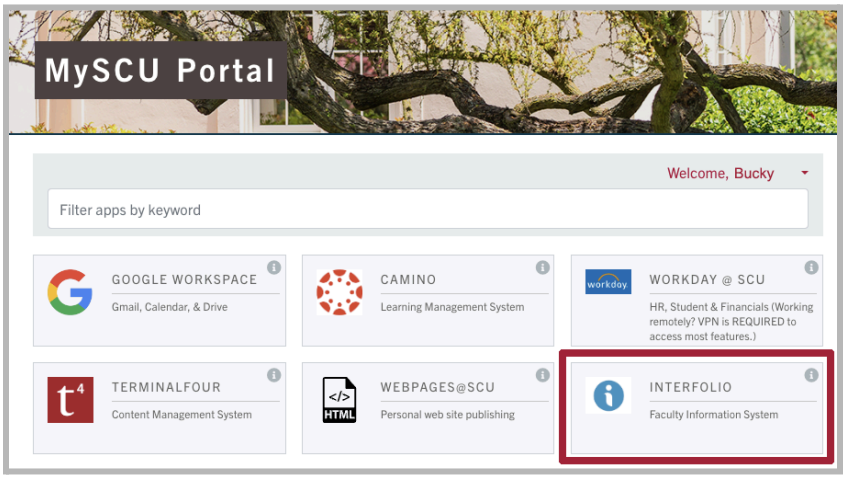


5. Add bookmarks for each component document, following these steps:
   a. click the bookmark tool to reveal the bookmark pane,
   b. put your cursor at the top the first component document,
   c. click the add bookmark icon,
   d. type the file name in the window and click the enter key,
   e. move to the next component document, and repeat until each document has a bookmark.

STEP 2 - LOGIN TO INTERFOLIO

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

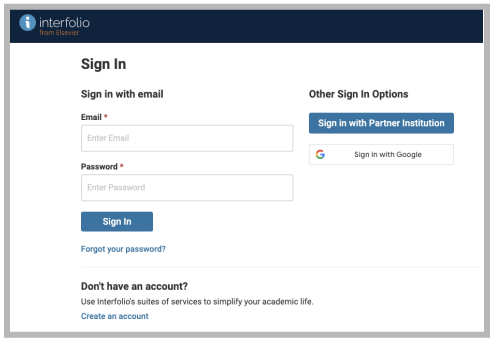
A



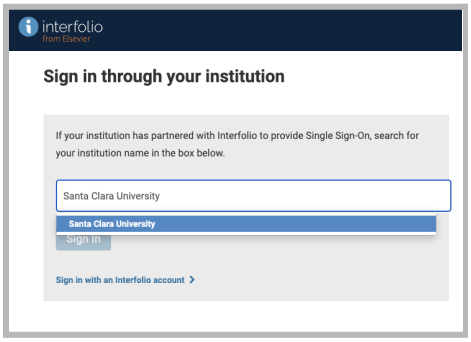
Sign into MySCU

Click on the Interfolio tile

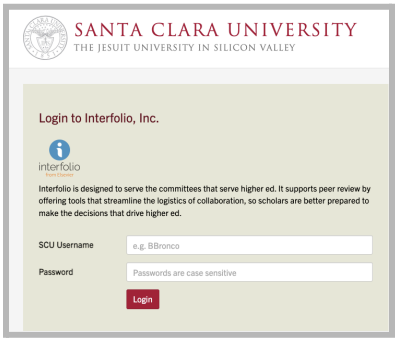
B



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

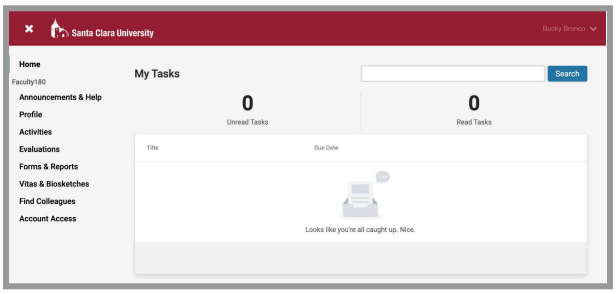


Type in Santa Clara University



Log in to MySCU Portal

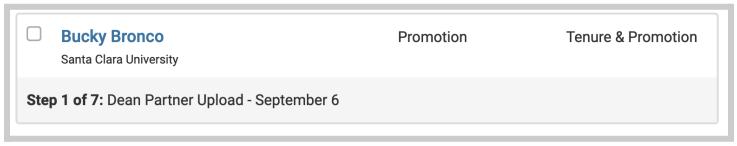
However you login, double-check that you're in the right account:



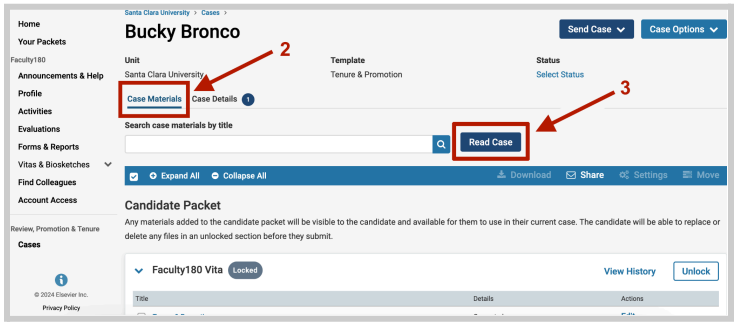
After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this. If it doesn't, you may be logged in to another Interfolio account. Contact Katie Williams (kfwilliams@scu.edu) to help you troubleshoot.

STEP 3 - CHECK THE CASE

You can review the candidate's petition when the case is shared with you, in order to check that the required materials have been included. A trigger with the candidate's name will appear on your dashboard:

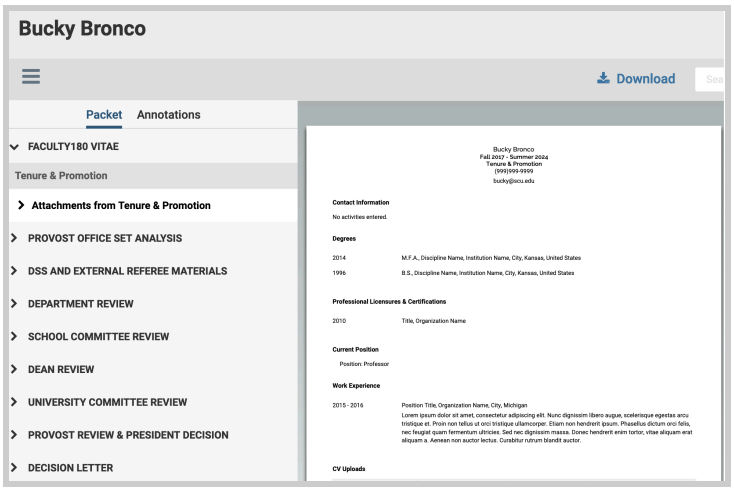


1. Click on the candidate's name in blue to bring you to the candidate's packet.

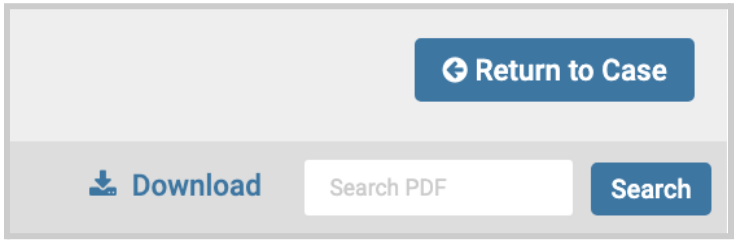


2. Select the Case Materials tab (upper left) of the candidate packet.

3. Click the Read Case button on the right to review the candidate's packet and to check that they submitted the necessary documents. Candidates for promotion to full who used the modified process (submitting scholarship and teaching documents on Google Drive) will have fewer files in Interfolio.



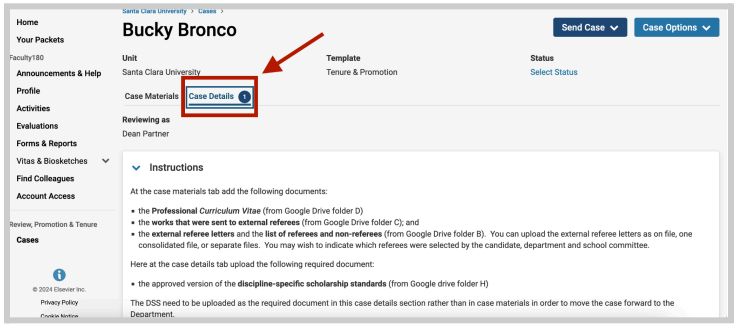
4. The left sidebar lists the sections of the candidate packet. Click on the › (caret) symbol next to any category to expand the section and to view its contents. There will be a caret and section for every activity category for which the candidate has uploaded files. Note that for those candidates going through the modified process (who elected to put their supporting materials in Google drive) the system-generated CV will be light.



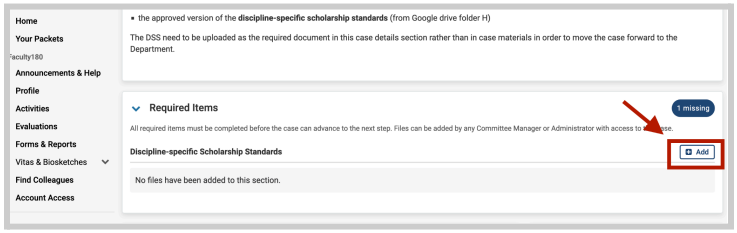
5. To exit the case materials, click the blue **Return to Case** button in the top right.

STEP 4 - UPLOAD STANDARDS TO CASE DETAILS

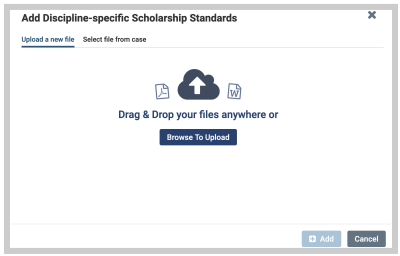
In this step, you'll upload the approved discipline-specific scholarship standards that the candidate has chosen at the Case Details tab.[2] This should be the first document you upload so that it appears at the top of the list of documents for subsequent reviewers.

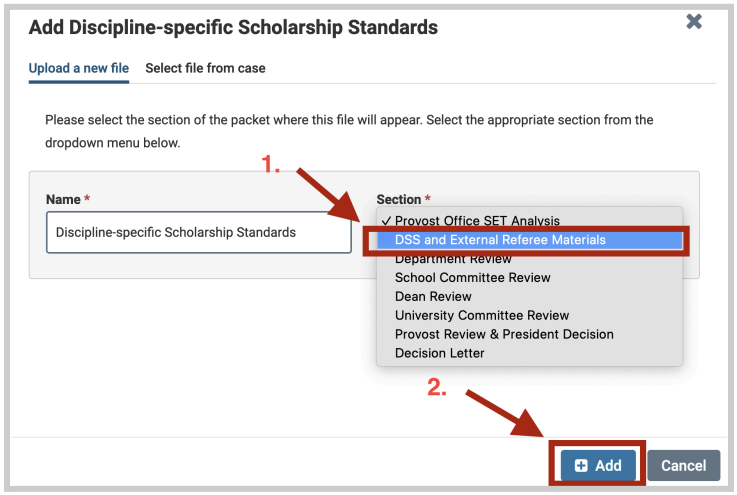


1. Go to the **Case Details** tab.



2. Click the **Add** button to upload this document. Browse your computer for the standards.





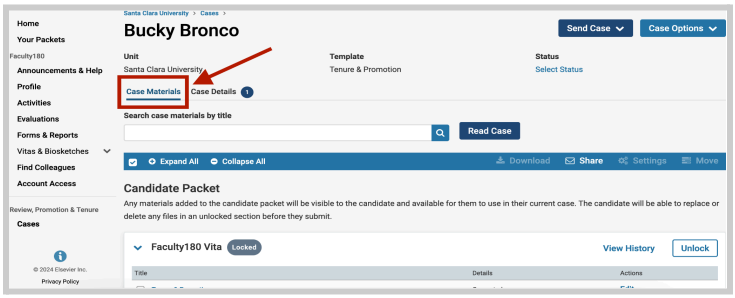
3. After uploading the standards from your computer, this screen will pop-up. In the Section field, select "DSS & External Referee Materials." Then click the blue **Add** button (bottom right) to submit.

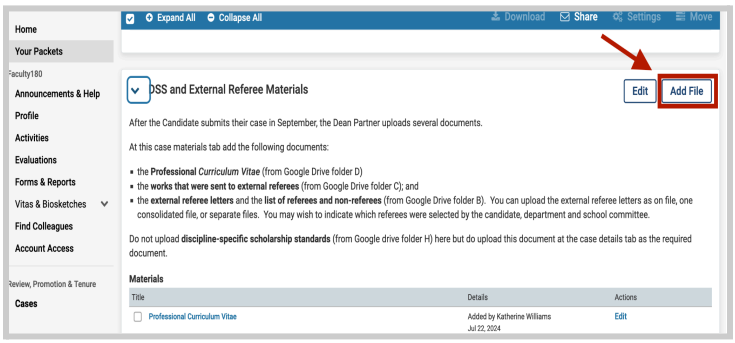
[2] The Provost's Office maintains a list of the current approved standards for each department online, as well as an archive of prior approved standards. Candidates may request the use of prior standards in limited circumstances that require Provost approval. Candidates indicate their choice on their external referee list. You uploaded the chosen standards to the Google Drive folder in advance of sending materials to external referees.

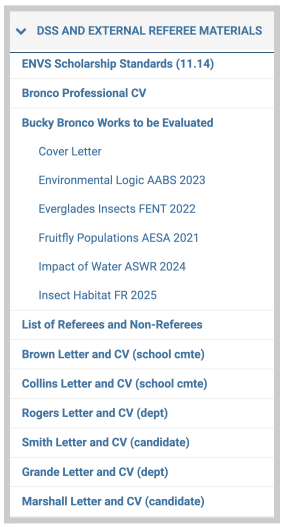
STEP 5 - UPLOAD OTHER DOCUMENTS TO CASE MATERIALS

Before you can add files to Interfolio, you should download them from Google Drive so that they're available from your laptop or desktop. The documents listed below are the documents that you will move. You will upload most of the documents at the Case Materials tab of the candidate's case. You should have already uploaded one document—the discipline-specific scholarship standards—at the Case Details tab (see Step 4).

> NOTE: Do not download all the supporting evidence for those candidates for full professor who chose to store their supporting evidence for scholarship and teaching on Google Drive; that supporting evidence will remain on Google Drive throughout their review.







1. Click the **Case Materials** tab and scroll down.

2. Open the internal section titled **DSS and External Referee Materials** by clicking the caret to the left**.** When you open it, you will see an **Add** button that you can use to add files. You will use this button repeatedly to upload materials originally stored in GDrive, that you might have renamed and reformatted (Step 1). The order you upload the documents is the order they will appear in the sidebar for subsequent reviewers, so we recommend the following order:

   MOU only if there is one. This will be rare (not shown on left image)

   Professional *CV* (GDrive *ƒ* D)

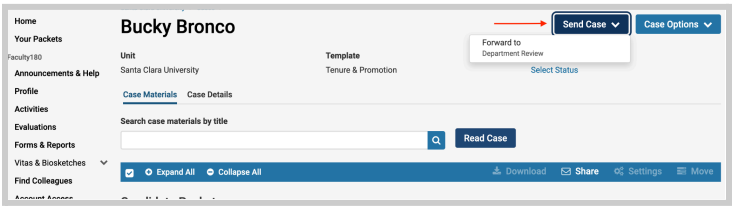
   Works to be Evaluated (GDrive *ƒ* C), ideally as a single file with each piece bookmarked (see pp. 2-3).

   List of Referees and Non-Referees (GDrive *ƒ* B); and

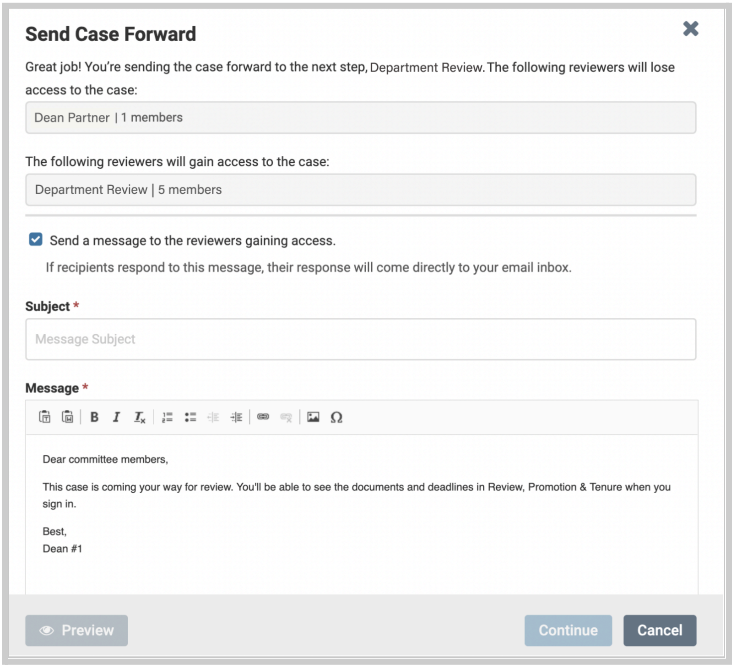
   External referee letters and CVs (GDrive *ƒ* B), one document per person.

STEP 6 - SEND CASE FORWARD

After uploading the various documents to the case, you will send the case forward to the department for review:



1. To forward the case to the Department Committee click on the **Send Case** button.



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.