

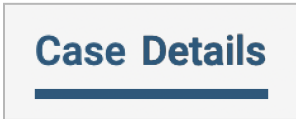



Rank, Tenure and Promotion using Interfolio

Instructions for the University Rank & Tenure Committee

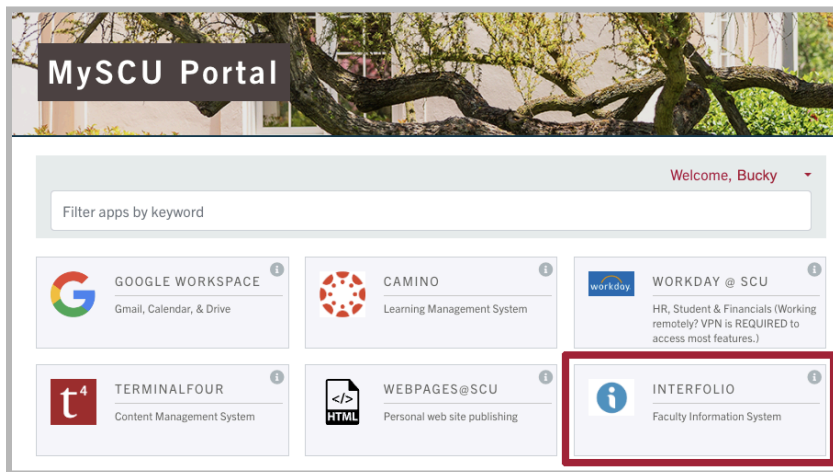
Overview

Step	Page
	1. Login to Interfolio Use the tile at the MySCU single sign-on portal. 2
	2. Review the Case All committee members who are participating in the review read the case materials in Interfolio to inform their evaluation. A single evaluation with the individual votes is prepared in Google Drive. 3-4
The remaining steps are for the committee chair alone	
	3. Upload Required Document to Case Details The committee chair uploads a PDF of the final committee evaluation at the Case Details tab, at the required document placeholder. 4-5
	4. Send Case Forward The committee chair sends the case forward to the Provost and President for the final stage of review. 5

STEP 1 - LOGIN TO INTERFOLIO

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

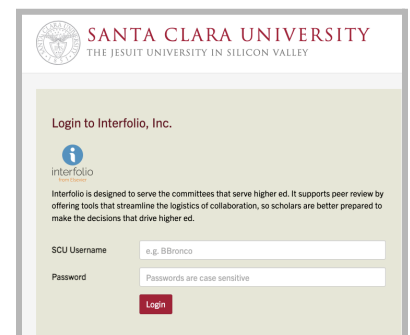
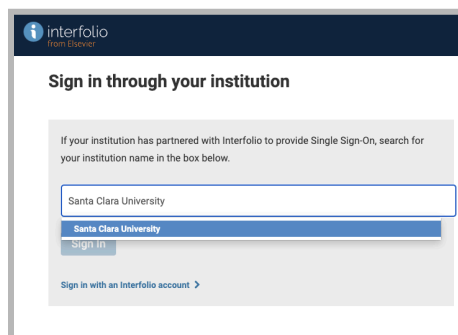
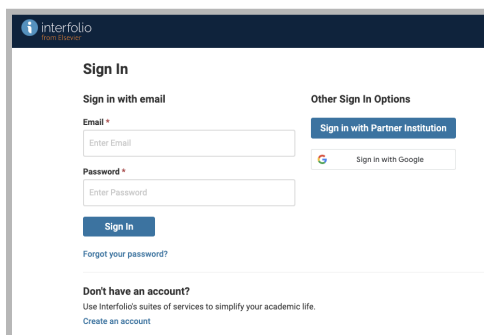
A



Sign into MySCU

Click on the Interfolio tile

B

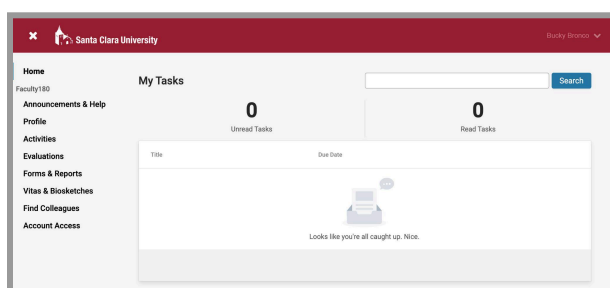


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

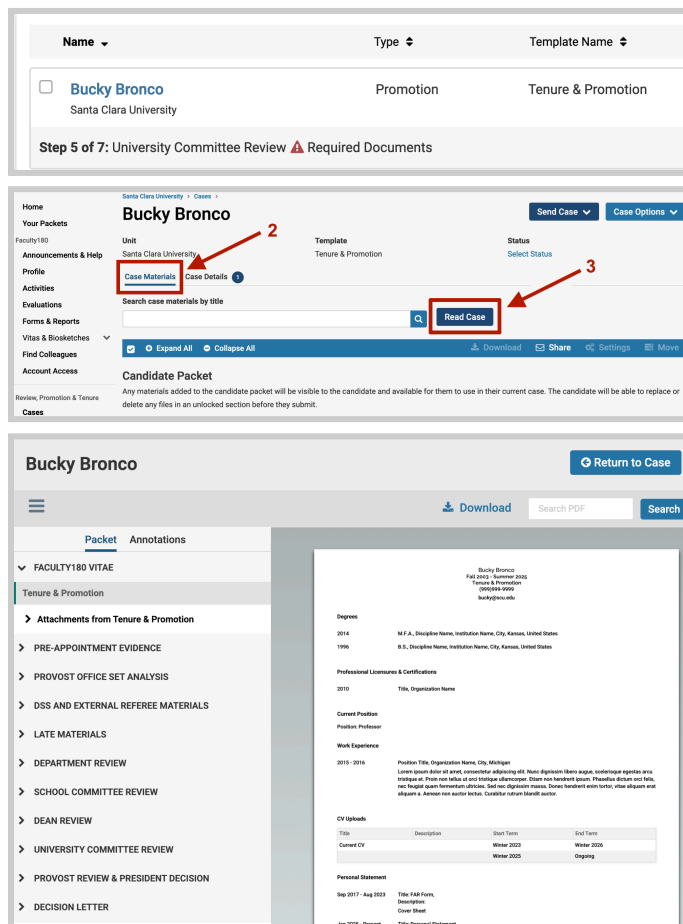
However you login, double-check that you're in the right account:



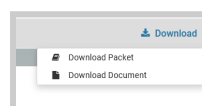
After you login, “Santa Clara University” should appear in the upper bar, and your screen should look like this (there may be cases in the central white window). If your screen doesn't look like this, you may be logged in to another Interfolio account. For troubleshooting support, contact Katie Williams (kfwilliams@scu.edu).

STEP 2 - REVIEW THE CASE

University committee members from a candidate's department will not participate in the candidate's case review at this stage (Faculty Handbook [3.4.4.6](#)) and will not see the candidate's name on their Interfolio dashboard. All other committee members will be given access to the candidate's case through Interfolio when it is forwarded to the university committee from the dean. For those participating, a trigger with the candidate's name will appear on your dashboard:



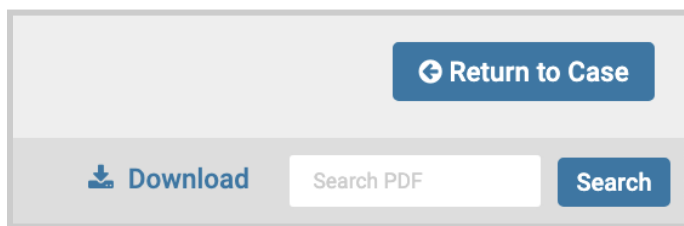
1. Click on the candidate's name in blue to bring you to the candidate's packet.
2. Select the Case Materials tab (upper left) of the candidate packet.
3. Click the Read Case button to review the candidate's packet. Candidates for promotion to full who used the modified process (submitting supporting evidence of scholarship and teaching 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.



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.

Notes on the contents of left sidebar sections:

- **Faculty180 Vitae** - There will be a caret and section for every activity category for which the candidate has uploaded files. For candidates for promotion to Professor who elected the "modified process," you will find a link to their supporting evidence in their petition cover sheet (in "Attachments from Tenure & Promotion > Personal Statement"), and their annotated CV in "CV Uploads."
- **Pre-Appointment Evidence** - Scholarship or creative activity that a tenure candidate might have provided that predates appointment at Santa Clara.
- **Provost Office SET Analysis** - Provides summary of course SET report averages and comparison to department and school averages for the period under review to a maximum of 10 years, excepting the initial online quarters during COVID (Winter and Spring 2020).
- **DSS & External Referee Materials** - Discipline-specific scholarship standards, the list of referees and non-referees, materials sent out to referees (professional CV, works shared), referee letters and CVs (including late letters). If there is an MOU from the time of hire, it will be uploaded here.
- **Late Materials** - Any evidence provided *by the candidate* that came in after the petition deadline.
- **Department Review** - Individual faculty letters, department meeting notes, and chair context letter.
- **School Committee Review** - School Rank & Tenure Committee evaluation and recommendation.
- **Dean Review** - The dean's evaluation and recommendation.



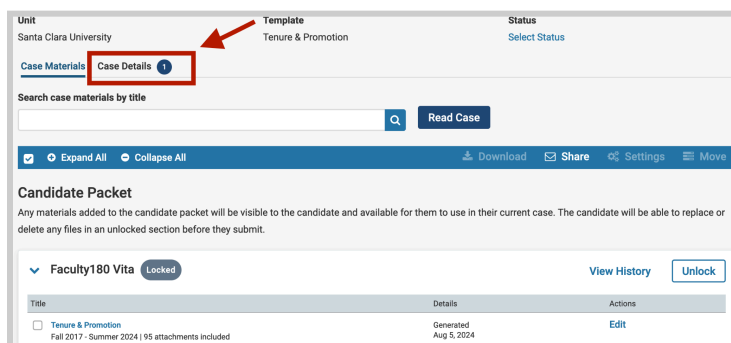
5. To exit the case materials, click the blue **Return to Case** button in the top right.

You will collaborate on a written report summarizing the committee evaluation and member scores for the case. The report can be prepared and shared on Google Drive. When the letter is finalized, the committee chair will take the final step.

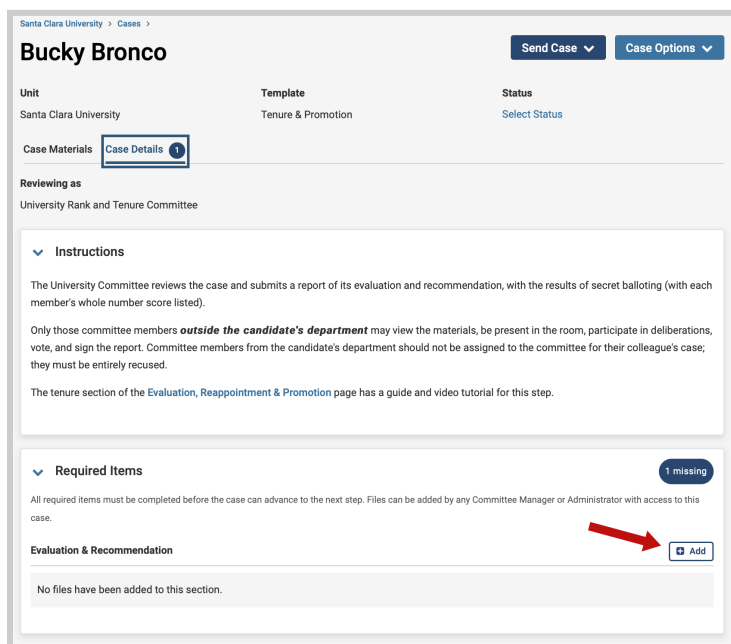
The remaining steps are for the chair alone

STEP 3 - UPLOAD REQUIRED DOCUMENT TO CASE DETAILS

The committee chair will submit one required document at the Case Details tab: the Evaluation & Recommendation. The document should be converted to PDF and available on your computer before it is uploaded 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 committee's required item: Evaluation & Recommendation.



2. Click on the **Add** button at the required document to upload the file. A pop-up window will allow you to browse your computer for the document.

Add Evaluation & Recommendation

Upload a new file | Select file from case

Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.

Name *
Evaluation and Recommendation

Section *
Provost Office SET Analysis
DSS and External Referee Materials
Late Materials
Department Review
School Committee Review
Dean Review
University Committee Review
Provost Review & President Decision

Add **Cancel**

- After uploading the document from your computer, this screen will pop-up. In the Section field, select “University Committee Review.” Then click the blue **Add** button (bottom right) to submit.

STEP 4 - SEND CASE FORWARD

Santa Clara University > Cases >

Bucky Bronco

Unit
Santa Clara University

Template
Tenure & Promotion

Case Materials | **Case Details**

Reviewing as
University R and T Committee

Send Case **Case Options**

Forward to
Provost Review & President Decision
Backwards to
Dean Review
Backwards to
Provost Review & President Decision

- Click on the dark blue **Send Case** button in the upper right corner to move the case to the Provost and President.

Send Case Forward

Great job! You're sending the case forward to the next step, Provost Review & President Decision. The following reviewers will lose access to the case:

University R and T Committee | 1 members

The following reviewers will gain access to the case:

Provost and President | 1 members

☒ Send a message to the reviewers gaining access.
If recipients respond to this message, their response will come directly to your email inbox.

Subject *
Message Subject

Message *

Preview **Continue** **Cancel**

- 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.