






# Faculty Activities Report using Interfolio

## Instructions for the Dean (JST)

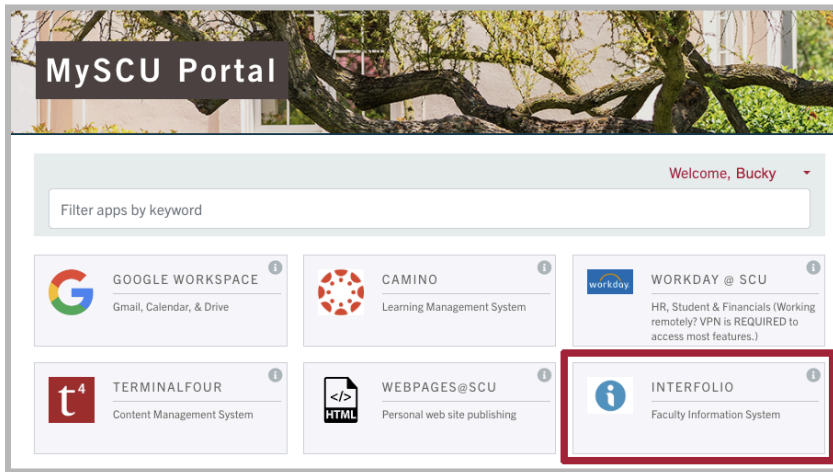
### Overview

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	<b>2. Review Case &amp; Download Vita</b> Read the case materials. Write an evaluation letter based on the evidence. Download the Vita and file it with your evaluation letter in the faculty member's personnel file.	3
	<b>3. Complete Required Steps</b> Upload the FAR Evaluation Letter and fill out a form indicating the appropriate merit scores and criteria weights. Please note: the form has two sections, one for teaching-track and tenure-stream faculty, and one for academic year Lecturers. Please fill out only the relevant part of the form.	4-5
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# STEP 1 - LOGIN TO INTERFOLIO

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

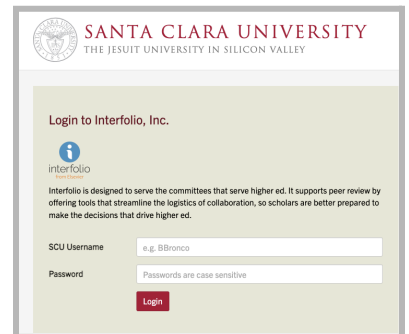
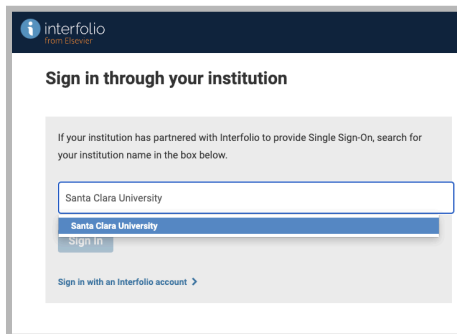
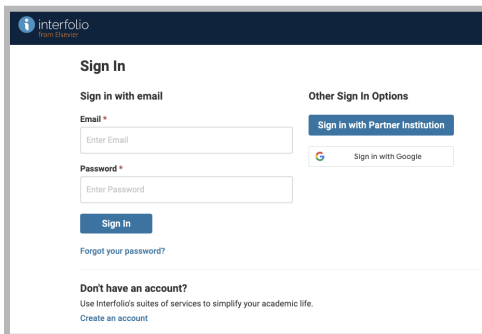
**A**



Sign into MySCU

Click on the Interfolio tile

**B**

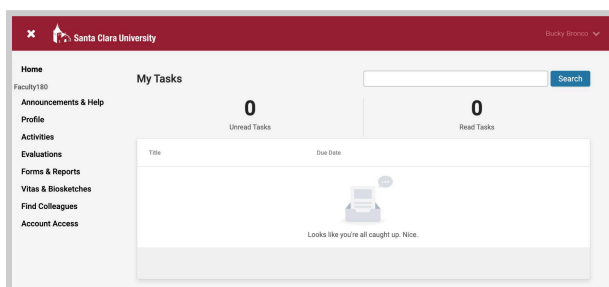


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

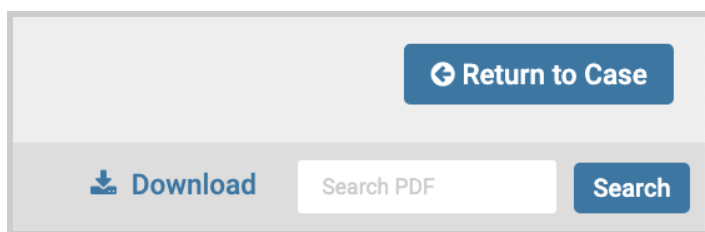
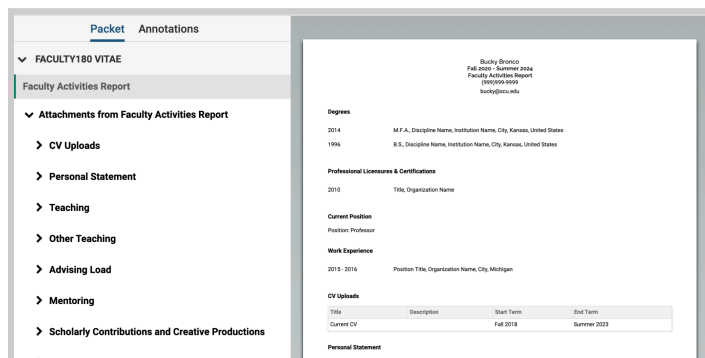
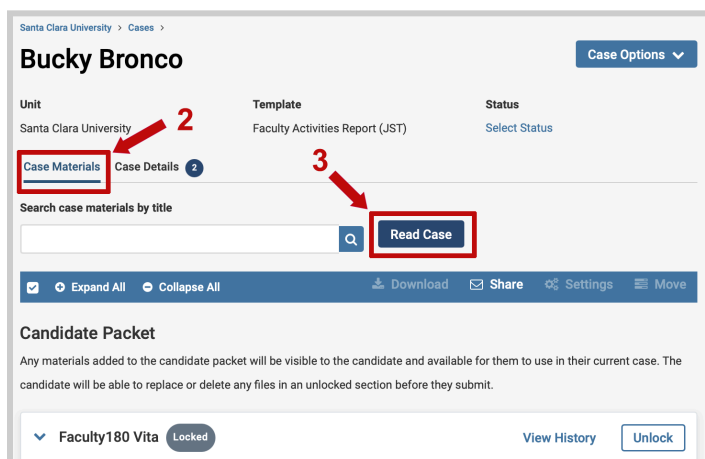
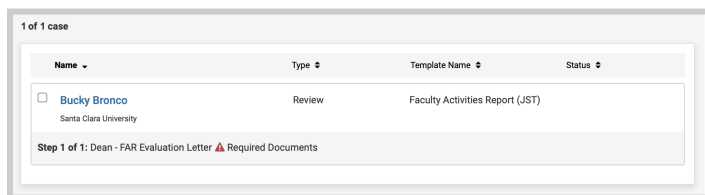
However you login, double-check that you're in the right account:



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

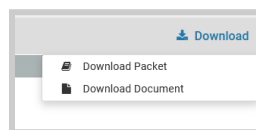
## STEP 2 - REVIEW CASE & DOWNLOAD VITA

You 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.

5. 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. With the vita in the browser window, download that document, print it, and add it to the faculty member's personnel file.



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

Write your evaluation letter. For Assistant and Associate teaching and tenure-stream professors, the letter should include guidance on how to strengthen their candidacy for promotion. University templates are available for Lecturers and for faculty in the Teaching Professor ranks on the [Evaluation, Reappointment & Promotion](#) page, at Evaluation > Faculty Activities Reporting.

## STEP 3 - COMPLETE REQUIRED STEPS

The dean will submit one required document and fill out one required form at the Case Details tab. Have the file available on your desktop to facilitate uploading to Interfolio.

The screenshot shows the 'Case Details' tab selected in the 'Case Materials' section. A red box highlights the 'Case Details' tab, and a red arrow points to it. The page displays case information: Unit (Santa Clara University), Template (Faculty Activities Report (JST)), and Status (Select Status). Below this is a search bar for case materials and a 'Read Case' button. A toolbar includes 'Expand All', 'Collapse All', 'Download', 'Share', 'Settings', and 'Move' options. The 'Candidate Packet' section contains instructions about adding materials.

Click the **Case Details** tab at the upper left. This section will reveal the dean's required items:

1. Required Document: Dean - FAR Evaluation Letter (PDF file)
2. Required Form: FAR - Dean Evaluation (JST)

The 'Required Items' section shows a '2 missing' status. It lists a required document: 'Dean - FAR Evaluation Letter' with an 'Add' button. Below this is a table of forms:

Form Name	Assignee	Actions
FAR - Dean Evaluation (JST)	Committee Managers	Manage Respondents
FAR - Dean Evaluation (JST)	Dean #1 (You)	2 Fill Out Form

### 1. Required Document

Click on the **Add** button to upload the FAR Evaluation Letter (PDF). A pop-up window will allow you to browse your computer for the letter.

The pop-up window is titled 'Add Dean - FAR Evaluation Letter'. It has two tabs: 'Upload a new file' (selected) and 'Select file from case'. Below the tabs is a dropdown menu for selecting the section of the packet. The 'Name' field contains 'Bronco, FAR Evaluation Letter' and the 'Section' dropdown is set to 'Dean Evaluation & Filing'. At the bottom are 'Add' and 'Cancel' buttons.

After uploading the letter from your computer, this screen will pop-up. In the Section field, select "Dean Evaluation." Then click the blue **Add** button (bottom right) to submit. Remember to add your evaluation letter to the faculty member's personnel file, in addition to their FAR Vita.

Santa Clara University > Cases > Bucky Bronco >

## FAR - Department Evaluation (CAS, ECP, LSB)

Use this form to record evaluation criteria scores and weights.

**Department \***  
Please select your department. This assists the Dean's Office to manage active cases.

**Teaching-track and Tenure-stream Faculty Form**  
Use this section of the form for faculty on the teaching track or tenure track. There is a separate section below for scoring Lecturers, Dean's Executive Professors, and Professors of Practice (academic year fixed-term faculty).

**Teaching Score**  
Use the scale defined by your school.

**Teaching Weight**  
Enter the percentage weight for teaching in the following format: for the 40% typical for tenure-stream faculty, enter 0.4; for the 70% typical for teaching-track faculty, enter 0.7.

**Scholarship/Creative Activity or Professional Activity Score**  
For tenure-stream faculty, enter the score for scholarship or creative activity. For teaching-track faculty, enter the score for professional activity.

**Scholarship/Creative Activity or Professional Activity Weight**  
For tenure-stream faculty, enter the weight for scholarship or creative activity (typically .4 [40%]). For teaching-track faculty, enter the weight for professional activity (typically .15 [15%]).

**Service Score**

**Service Weight**  
Enter the weight for service. This is typically .2 (20%) for tenure-stream faculty, and .15 (15%) for teaching-track faculty.

**Overall Score**

**Lecturer Form**  
Use the following options if the faculty member under review is a Lecturer, Dean's Executive Professor, or Professor of Practice (all of these ranks are academic year fixed-term faculty).

**Teaching**  
Teaching counts for 95% of the overall evaluation.

Exceeds Expectations/Superior Performance

Meets Expectations

Below Expectations

**Service**  
Service counts for 5% of the overall evaluation.

Meets or Exceeds Expectations

Below Expectations

**Overall**

Meets or Exceeds Expectations

Below Expectations

**Submit Form** **Save Responses** **Return to Case**

## 2. Required Form

Click **Fill Out Form** under Actions; this form will pop-up. The form has two sections. The top section should be used if the faculty member is a teaching-track or tenure-stream professor (assistant, associate, or full rank).

The bottom part of the form should be used if the faculty member is an academic year, fixed-term faculty member, thus for faculty with the following titles:

- Lecturer
- Professor of Practice
- Dean's Executive Professor

Using the appropriate part of the form, fill in the individual evaluation score and weight for each of the three criteria (teaching, scholarship, and service). The following weights are typical, though there is some latitude for variance for associate and full teaching-track and tenure-stream ranks:

Rank	Teaching	Scholarship*	Service
Lecturer	0.95	—	0.05
Teaching track	0.70	0.15	0.15
Tenure track	0.40	0.40	0.20

\* "Professional Activity" for Teaching-track faculty

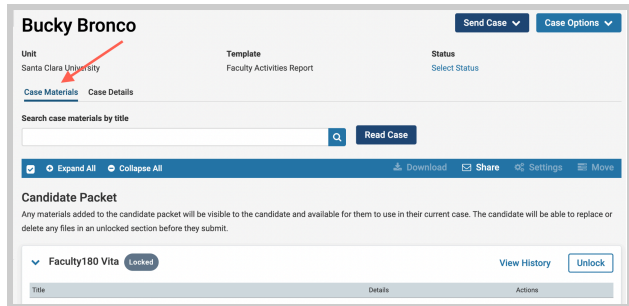
- **Save Responses** button. This takes you to the prior screen; click "Fill Out Form" to return to the form screen to submit the form.
- **Submit Form** button

If you wish to send the letter to the faculty member via Interfolio rather than in hard copy or via email, you need to do this before you ask the Provost's Office to close the case. See pp. 6-7 for directions.

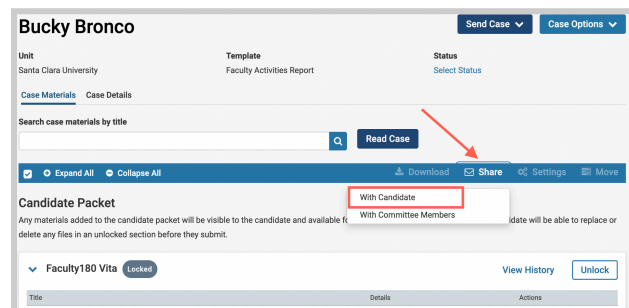
## STEP 4 - SHARE LETTER WITH FACULTY MEMBER

Share the letter with the faculty member, via email, in hard copy, or in Interfolio. Discuss the results with them if they have questions. Mention their right to file a written response to the letter (Faculty Handbook [3.3](#)).

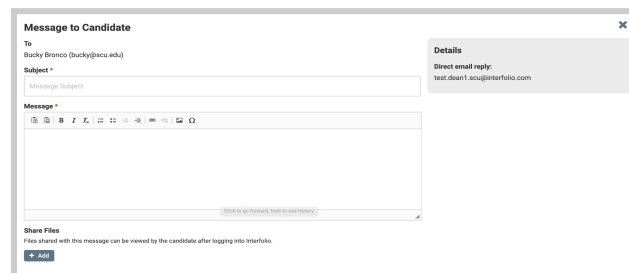
Directions follow for sharing the letter with the faculty member from within Interfolio, if you choose this method.



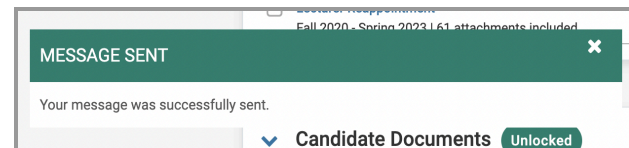
1. Click the **Case Materials** tab at the upper left.



2. Click the **Share** button on the blue banner. Select “With Candidate.”

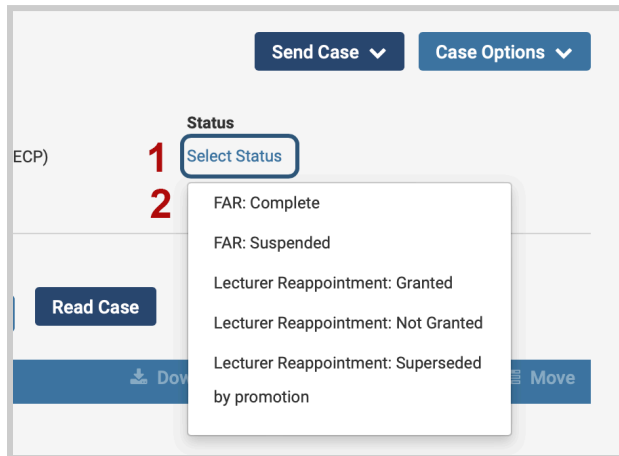


3. This messaging window will pop up. Complete the Subject and Message to the faculty member. Select the **FAR Evaluation Letter** to share with the faculty member. **DO NOT** select the other uploaded documents or the “Select All” button. Then click the blue **Send** button to share the FAR Evaluation Letter with the faculty member. A message will pop up briefly to indicate that the message has been successfully shared with the faculty member.



## STEP 5 - CHANGE STATUS OF CASE

Change the status of the case to “FAR: Complete.” This indicates to Provost Office staff that you have completed your review and downloaded all needed materials to the faculty member’s personnel file. The Provost’s Office will subsequently close the case.



1. Click **Select Status**
2. From the pop-up window, select “FAR: Complete.”

You have completed the Dean steps for the case.

Note: You can request a report of completed cases and faculty merit scores/weights; email Katie Williams ([kfwilliams@scu.edu](mailto:kfwilliams@scu.edu)).