






# Faculty Activities Report using Interfolio

## Instructions for Department Review

### CAS, ECP, ENG, LSB

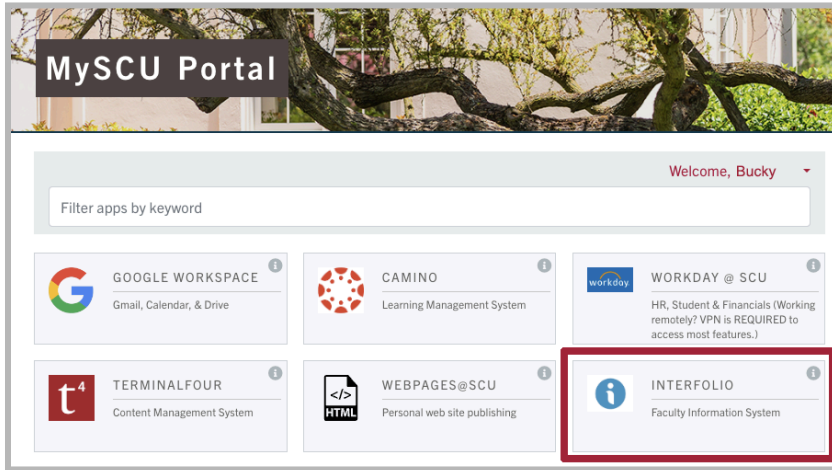
#### Overview

	Step	Page
	<b>1. Login to Interfolio</b> Use the tile at the MySCU single sign-on portal.	2
	<b>2. Review the Case</b> All faculty reviewing the case read the case materials in Interfolio to inform their evaluation.  CAS & ECP: The person responsible to draft the evaluation letter does so on Google Drive. If there is a committee, they may meet to review draft letters. The Associate Dean reviews the draft before the letter is finalized.	3
<b>The remaining steps are for the process chair alone</b>		
	<b>3. Complete Required Steps</b> You will upload one document (a PDF of the final 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-track faculty and one for Lecturers. Please fill out only the relevant part of the form.	4-5
	<b>4. Send Case Forward</b> Send the case forward to the dean for the next stage of review.	6
	<b>5. Share Letter with Faculty Member</b> The department chair shares the letter with the faculty member, either in hard copy, by email, or within Interfolio.	6-7

# STEP 1 - LOGIN TO INTERFOLIO

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

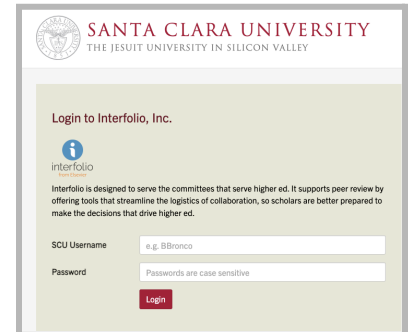
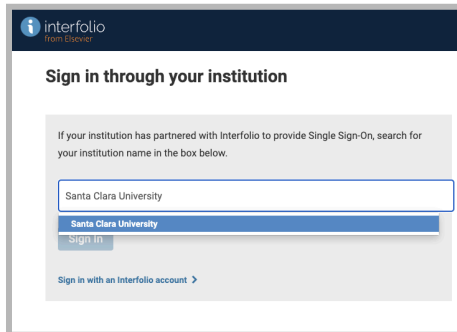
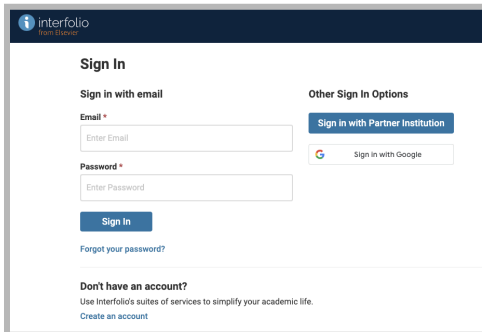
**A**



Sign into MySCU

Click on the Interfolio tile

**B**

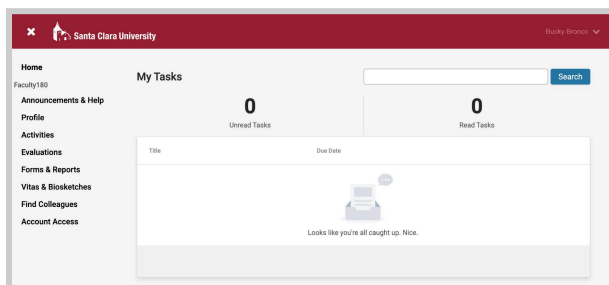


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

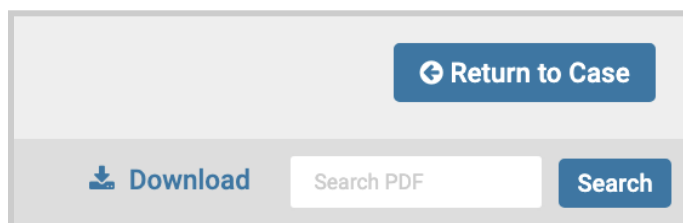
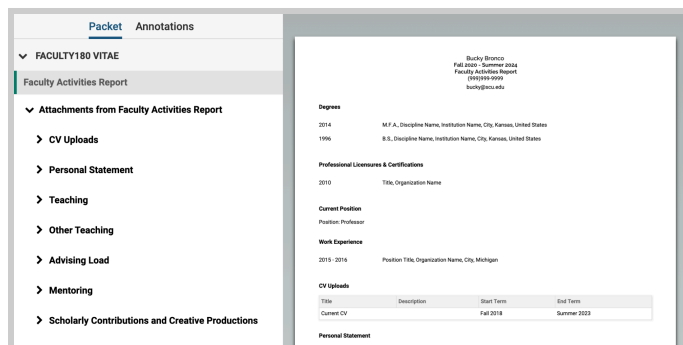
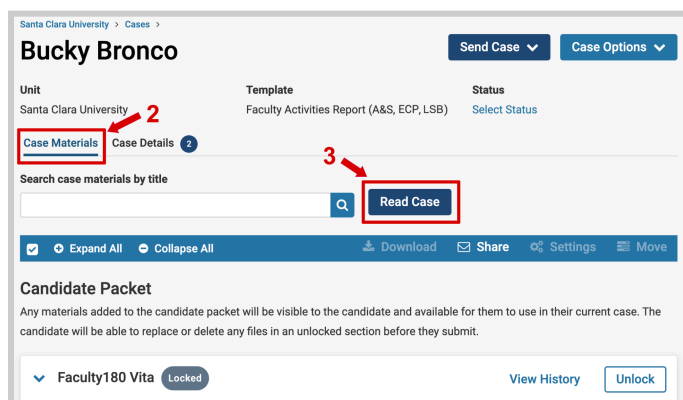
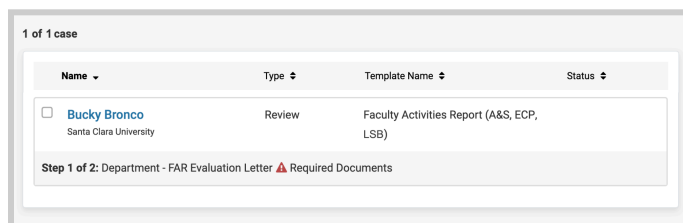
However you login, double-check that you're in the right account:



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.

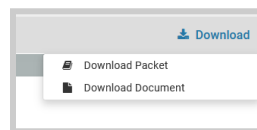
## STEP 2 - REVIEW THE CASE

All faculty participating in the review 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.

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.



NOTE: For full professors in CAS who elected the modified process, a link to supporting teaching and scholarship/creative materials will appear in their FAR form.

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

The faculty involved in the case will review the candidate's materials and draft a letter (for Lecturers and for Teaching-track faculty, use the University templates on the [Evaluation, Reappointment & Promotion](#) page, Evaluation > Faculty Activities Reporting section). If there is a committee, they may meet to discuss their evaluation. For Assistant and Associate teaching-track and tenure-track faculty, the letter should include guidance to enhance their candidacy for promotion. In CAS and ECP, the letter is drafted on Google Drive, and then shared and reviewed with the Associate Dean outside of Interfolio before it is finalized. After all participating faculty have signed the final report (electronically or manually), the process chair takes the final steps.

The remaining steps are for the process chair alone

## STEP 3 - COMPLETE REQUIRED STEPS

The department or process chair 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 file name will appear in the sidebar for reviewers at subsequent stages, so please title it with that in mind.

The screenshot shows the 'Bucky Bronco' case page. At the top, there are tabs for 'Case Materials' and 'Case Details', with 'Case Details' selected and highlighted by a red box. A red arrow points to the 'Case Details' tab. Below the tabs, there is a search bar and a 'Read Case' button. A 'Candidate Packet' section is visible, with a note about materials added to the packet.

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

1. Required Document: Department - Final FAR Evaluation Letter (PDF file)
2. Required Form: FAR - Department Evaluation (CAS, ECP, LSB)

The screenshot shows the 'Required Items' section. It indicates that 2 items are missing. Below this, there is a section for 'Department - Final FAR Evaluation Letter' with an 'Add' button. A table lists the required forms:

Form Name	Assignee	Actions
FAR - Department Evaluation (CAS, ECP, LSB) 1 required questions	Committee Managers	Manage Respondents
FAR - Department Evaluation (CAS, ECP, LSB) 1 required questions	Department Committee Member #1 (You)	Fill Out Form 2

### 1. Required Document

Click on the **Add** button to upload the Final FAR Evaluation Letter (PDF). In CAS and ECP, this is the form of the letter that you have reviewed on Google Drive with your Associate Dean. A pop-up window will allow you to browse your computer for the letter.

After uploading the letter from your computer, this screen will pop-up. In the Section field, select "Department Evaluation." Then click the blue **Add** button (bottom right) to submit.

The screenshot shows a pop-up window titled 'Add Department - Final FAR Evaluation Letter'. It has two tabs: 'Upload a new file' and 'Select file from case'. Below the tabs, there is a dropdown menu for 'Section \*' with 'Department Evaluation' selected and highlighted by a red arrow. There is also a text input field for 'Name \*' containing 'Bronco, FAR Evaluation Letter F24'. At the bottom, there are 'Add' and 'Cancel' buttons.

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 on the teaching track or the tenure track, thus for the following ranks:

- Assistant Teaching Professor
- Associate Teaching Professor
- Teaching Professor
- Assistant Professor
- Associate Professor
- Professor

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

Identify your department from the drop-down menu. Then, 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). Note that, for lecturers, weights are not required. Typical weights for the other ranks are:

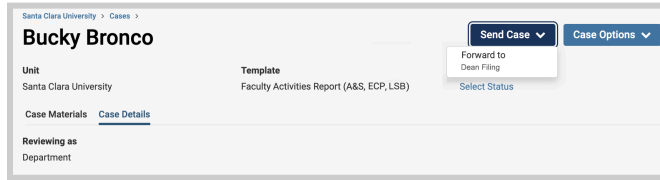
Rank	Teaching	Scholarship*	Service
Teaching track	0.70	0.15	0.15
Tenure track	0.40	0.40	0.20

\* "Professional Activity" for teaching-track faculty

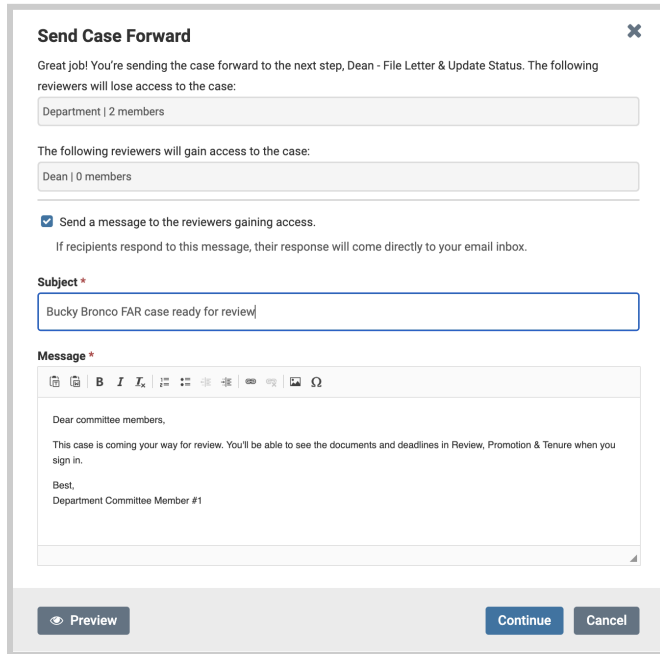
- **Save Responses** button. This takes you to the prior screen; click "Fill Out Form" to return to the form screen to submit the form.
- **Submit Form** button

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 send the case forward to the dean. See pp. 6-7 for directions.

## STEP 4 - SEND CASE FORWARD



1. Click on the dark blue **Send Case** button in the upper right corner to move the case to the Dean.



2. 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.

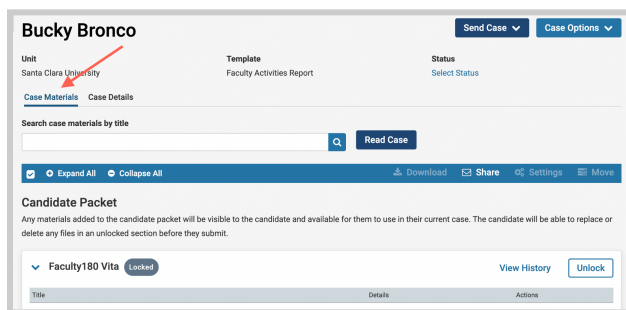
You have completed the submission.

You have only one step remaining, outside of Interfolio.

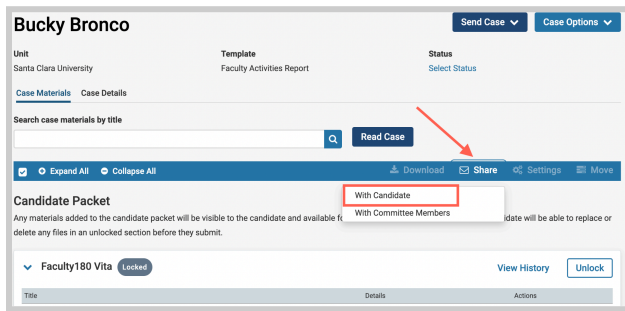
## STEP 5 - SHARE LETTER WITH FACULTY MEMBER

Share the letter with the faculty member, via email, in hard copy, or in Interfolio before you send the case forward to the dean. Discuss the results with them if they have questions. Mention their right to file a written response to the letter (Faculty Handbook [3.3](#)); for bargaining unit members, this needs to be done within ten (10) days of receipt of the letter (CBA Art. [11.E](#)).

Directions follow for sharing the letter with the faculty member from within Interfolio, before the case is sent to the dean.



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.

