








Teaching Professor Rank & Promotion using Interfolio

Instructions for the Provost

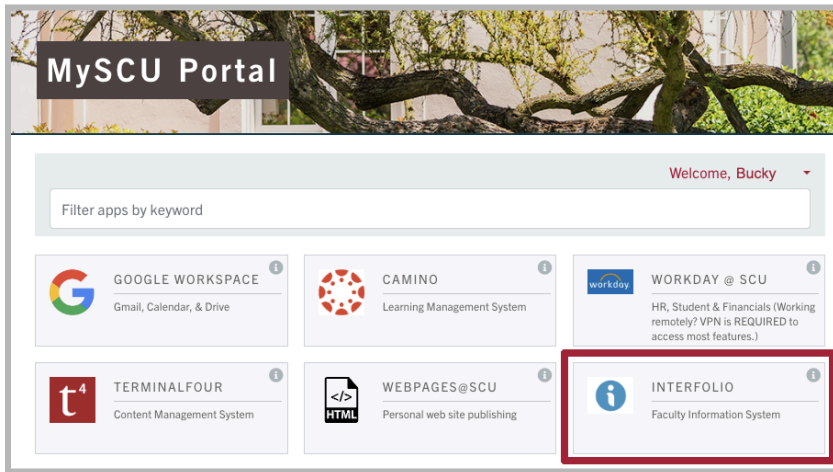
Overview

| | Step | Page |
|---|--|------|
| Provost & Vice Provost | | |
|  | 1. Login to Interfolio Use the tile at the MySCU single sign-on portal. | 2 |
|  | 2. Review Cases Read the case materials in Interfolio to inform your decision. | 3 |
|  | 3. Convey Decisions to Provost Staff Convey the Provost's decisions to the Director of Faculty Personnel outside Interfolio. | 4 |
| Provost Office Staff | | |
|  | 4. Notify Candidate and Upload Decision Letter Send the Provost's decision letter to the candidate and upload the letter to the "required document" at the Case Details tab. | 5 |
|  | 4a. Upload Reappointment Decision Letter If the case is a hybrid reappointment and promotion case, and if promotion is denied, email the dean to request their decision letter, and upload it to the Provost Decision section at the Case Materials tab. | 6 |
|  | 5. Fill Out Required Form Fill out a required form at the Case Details tab indicating the Provost's decision. | 7 |
|  | 6. Change Status of Case After the period for appeal has passed, change the status of the case to reflect the Provost's decision and close the case. | 8 |

STEP 1 - LOGIN TO INTERFOLIO

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

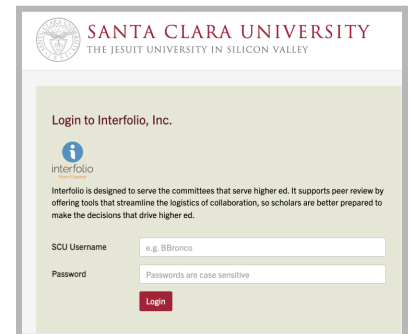
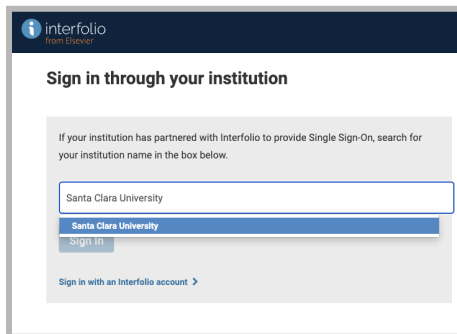
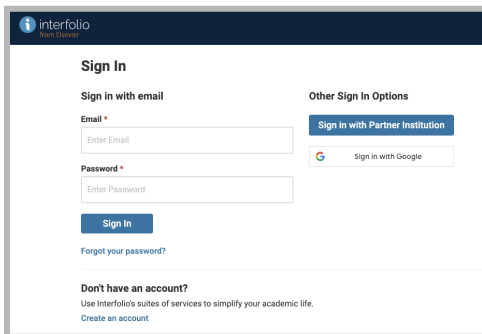
A



Sign into MySCU

Click on the Interfolio tile

B

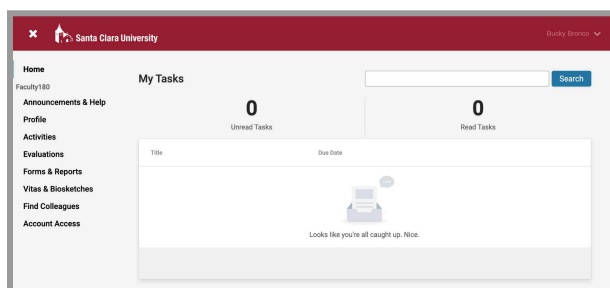


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

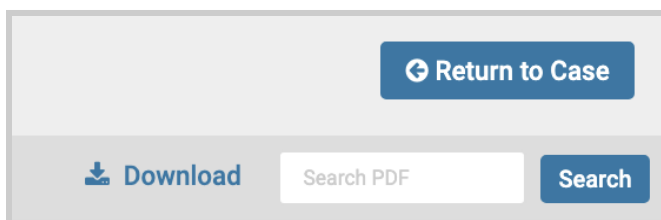
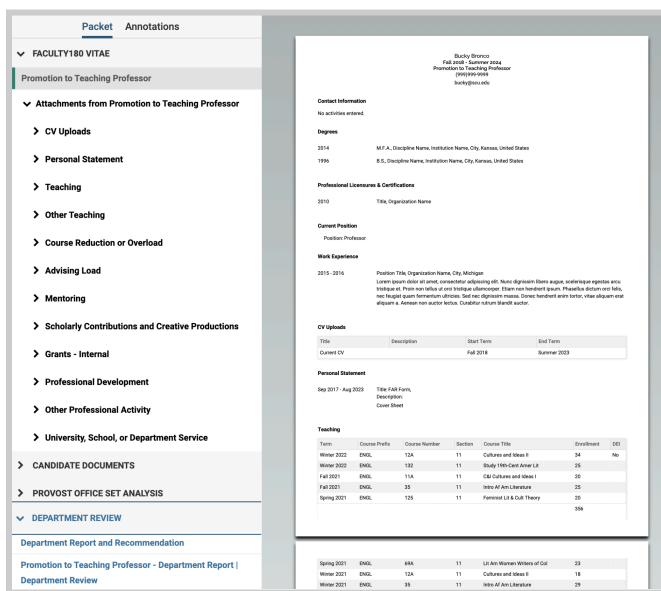
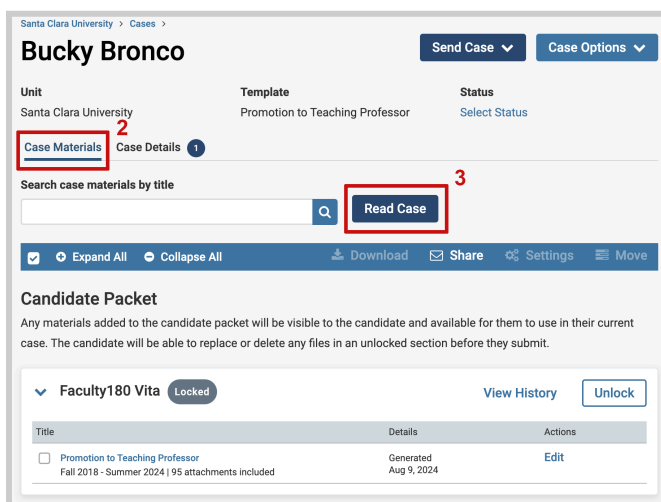
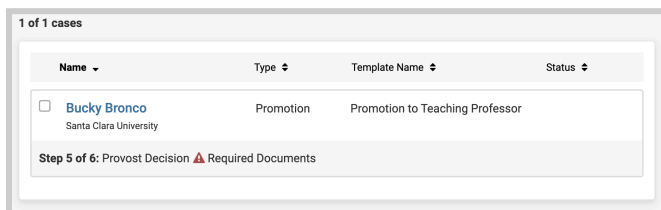
However you login, double-check that you're in the right account:



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).

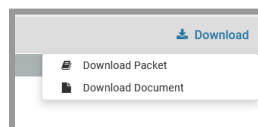
STEP 2 - REVIEW CASES

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. *Note: The template name will differ depending on the type of case.*
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 Review
 - Dean Notification to Candidate
 - School Committee Review
 - Dean Review
5. To exit the case materials, click the blue **Return to Case** button in the top right.

STEP 3 - CONVEY DECISIONS TO PROVOST STAFF

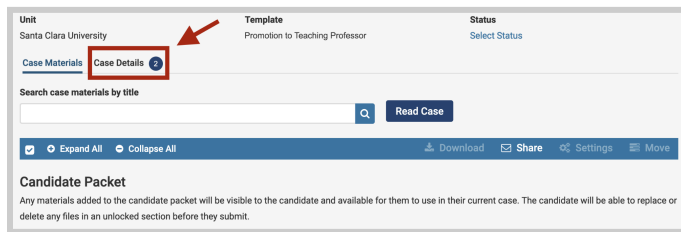
The Senior Manager for Faculty Affairs will prepare a spreadsheet listing all of the candidates for promotion in the teaching professor ranks and share it with the Provost Committee on Google Drive. The Vice Provost for Academic Affairs will review the cases and log on the spreadsheet the votes at each stage of review, adding notes as necessary. The Provost will discuss the cases with the deans if necessary, and the Provost's decision on each case will be added to the spreadsheet. The Provost or Vice Provost will notify the Director of Faculty Personnel when the spreadsheet is complete.

| School | Dept | Last | First | Current Rank | Promotion Type | Department highrec, rec, dnr | School Cmte highrec, rec, dnr | Dean | PROVOST'S Decision | Notes |
|--------|------|---------|-------|------------------------------|--|---------------------------------|----------------------------------|------|-----------------------|-------|
| ENG | BIOE | Doe | Jane | Assistant Teaching Professor | Promotion to Associate | 4-2-0 | 3, 2, 0 | Yes | Yes | |
| BUS | ISBA | Smith | Ron | Associate Teaching Professor | Promotion to Teaching Professor | 2-4-3 | 1-1-3 | No | No | |
| A&S | RELS | Murray | Sally | Assistant Teaching Professor | Reappointment & Promotion to Associate | 9-4-0 | 4-1-0 | Yes | Yes | |
| ECP | EDUC | Buckley | Al | Associate Teaching Professor | Promotion to Teaching Professor | 3-7-1 | 1-3-0 | Yes | Yes | |

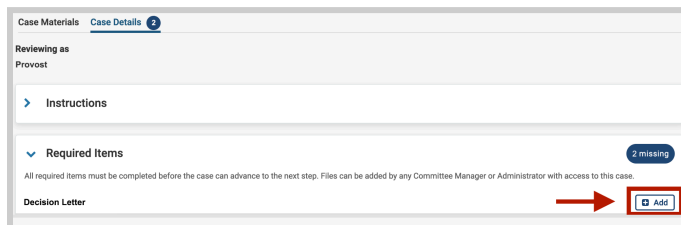
The remaining steps are for the Provost Office staff

STEP 4 - NOTIFY CANDIDATE AND UPLOAD DECISION LETTER

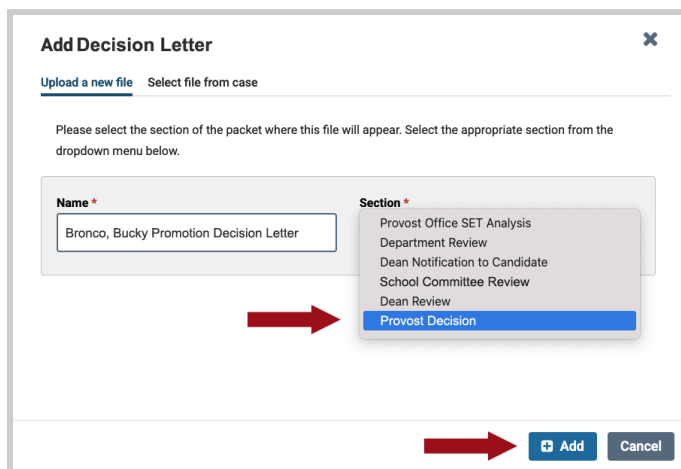
Provost Office staff will draft promotion decision letters and email them to each candidate. You will then upload the letter to the case.



1. Click the **Case Details** tab at the upper left. This section will reveal the two required items at this step (note the blue badge with the number of outstanding required items on the tab): Decision Letter (required document) and [Process Name] - Provost's Decision (required form). In this step, you'll upload the required *document*; in Step 5, you'll fill out the required *form*.



2. Open the "Required Items" section by clicking on the caret to the left of the title. Click on the **Add** button to the right of the "Decision Letter" to upload the file. A pop-up window will allow you to browse your computer for the document.

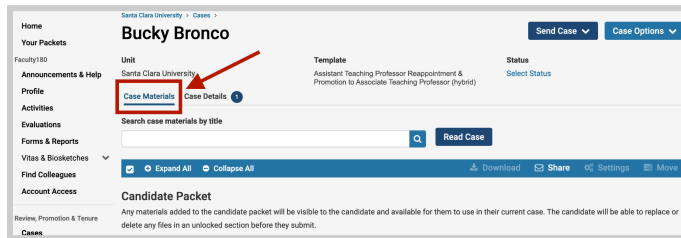


3. After uploading the document from your computer, this screen will pop-up. In the Section field, select "Provost Decision." Then click the blue **Add** button (bottom right) to submit.

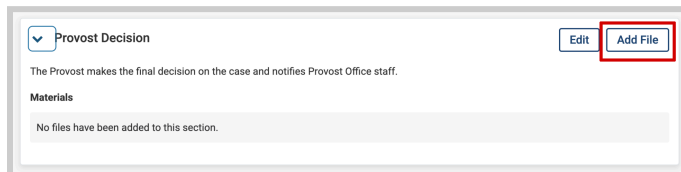
STEP 4a - UPLOAD REAPPOINTMENT DECISION LETTER

In a limited number of cases, you will upload one additional document to the case. These are the hybrid reappointment and promotion cases that result in a denial of promotion at the Provost step. In these cases, the dean will have to make a reappointment decision (the dean does not have to do this when someone is granted promotion, because promotion supersedes reappointment).

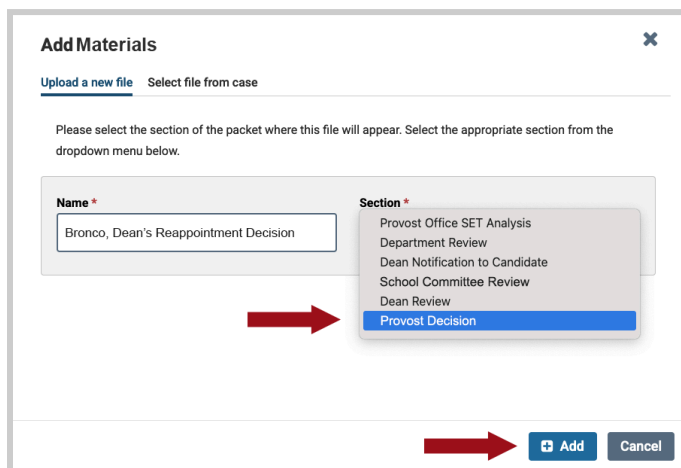
You will email the dean to request their reappointment decision letter, and then you will upload the file to the case. When you receive the file from the dean, follow these steps:



1. Navigate to the **Case Materials** tab.



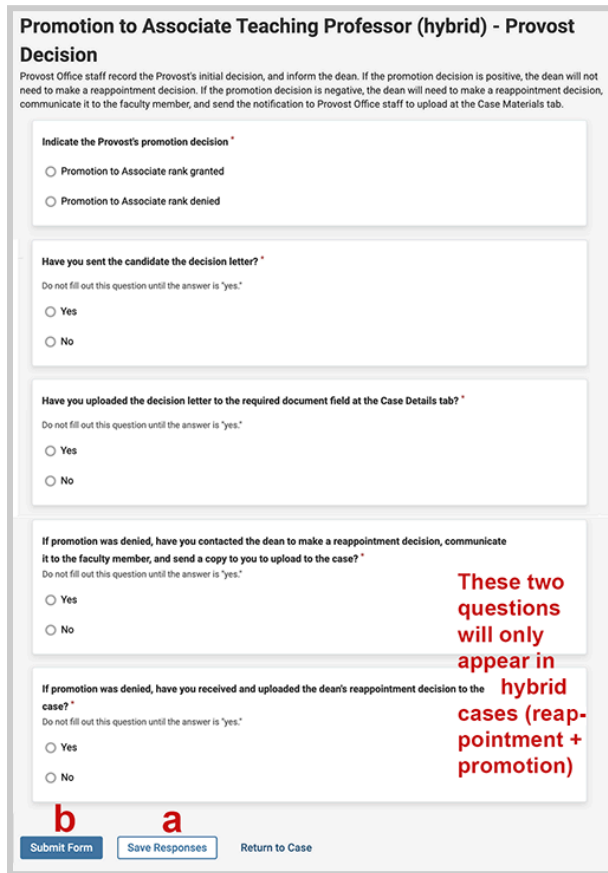
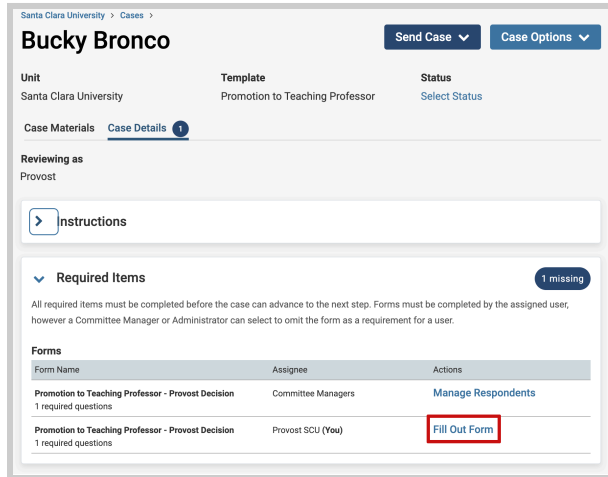
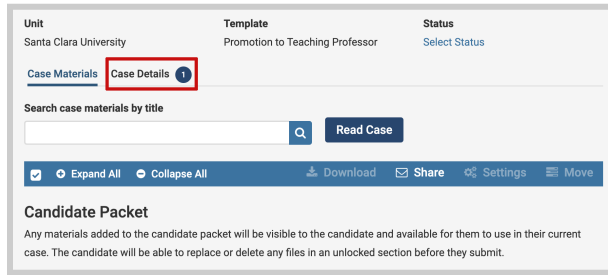
2. Scroll down to the Provost Decision section, and click the Add button. (Your screen may show the Provost's Decision Letter under "Materials" if you've uploaded it. This is the required document; you are uploading an additional document.)



3. After uploading the file from your computer, this screen will pop-up. In the Section field, select "Provost Decision" (it's the dean's decision, but you're adding it at the point when the Provost has the case). Then click the blue **Add** button (bottom right) to submit.

STEP 5 - FILL OUT REQUIRED FORM

You will fill out one required form at the Case Details tab: “[Process Name] Provost’s Decision.”



1. Click the **Case Details** tab at the upper left. This section will reveal the remaining required item: “[Process Name] - Provost’s Decision.” Note that the number in the blue badge changes as you upload “missing” items. Since you’ve uploaded the required document, the number has changed from “2” missing items to “1.” The form is the last missing required item.

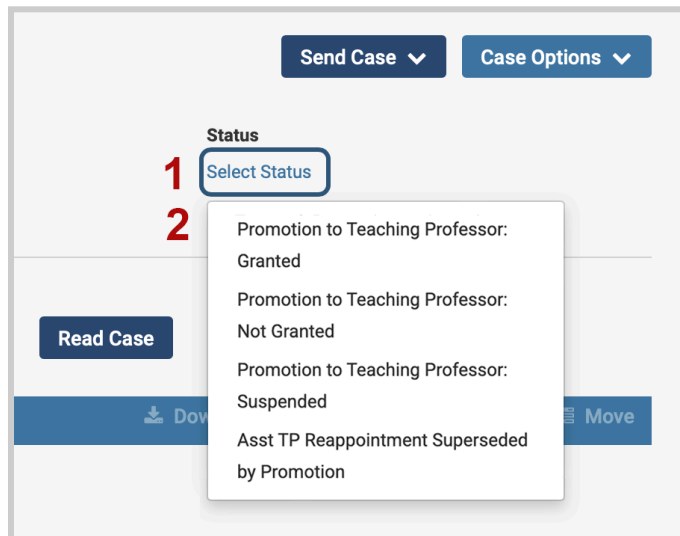
2. Click the blue text that reads “Fill Out Form” and mark all options that apply. You can ignore the “Manage Respondents” link.

3. In the checklist, click all of the options that apply. Only cases involving both the Provost’s decision about promotion and the dean’s decision about reappointment will have the last two questions. Then click in sequence:

- Save Responses** button. This takes you to the prior screen. Click “Fill Out Form” to return to this screen to submit the form.
- Submit Form** button.

STEP 6 - CHANGE STATUS OF CASE

After the period for appeal has passed and all promotion decisions have been finalized, change the status of the case to indicate the Provost's final decision. This indicates to Faculty Affairs staff that all steps have been completed, and they will close the case.



1. Click **Select Status**
2. From the pop-up window, select the status that is appropriate to the resolution of the case. There are several of these, so you may have to scroll down.

You have completed all necessary steps for the case.