

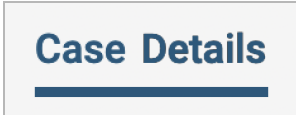



# Teaching Professor Reappointment and/or Promotion using Interfolio

## Instructions for the Department

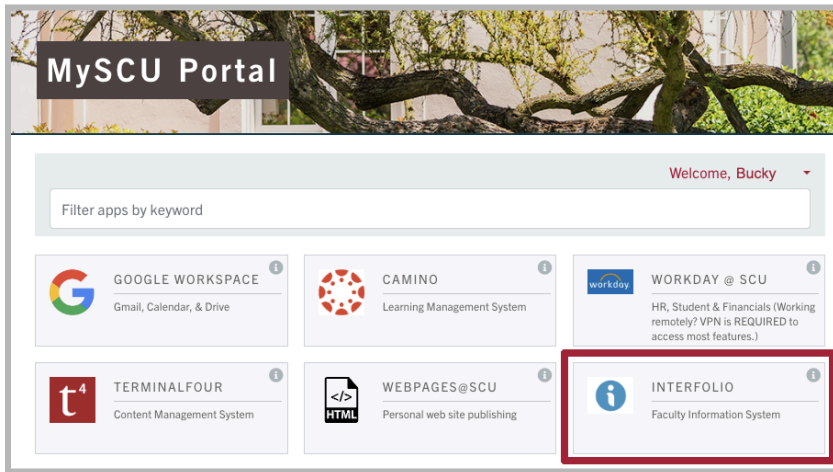
### Overview

	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 (full) teaching professors and tenured faculty who are participating in the review read the case materials in Interfolio to inform their evaluation. The group meets to discuss the case. For reappointment, the department makes one consensus recommendation. For promotion, individual votes are recorded. The department drafts one report that all participating faculty sign (even for hybrid cases) incorporating the consensus recommendation for reappointment (if relevant) and promotion vote tally (if relevant). The report may be shared on Google Drive while it is being drafted and discussed.	3-4
<b>The remaining steps are for the process chair alone</b>		
	<b>3. Complete Required Steps</b> Upload one required document (the department Report & Recommendation) and fill out a form indicating the reappointment recommendation (if relevant) and the results of voting on promotion (if relevant).	4-5
	<b>4. Send Case Forward</b> Send the case forward to the dean for the next stage of review.	5

# STEP 1 - LOGIN TO INTERFOLIO

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

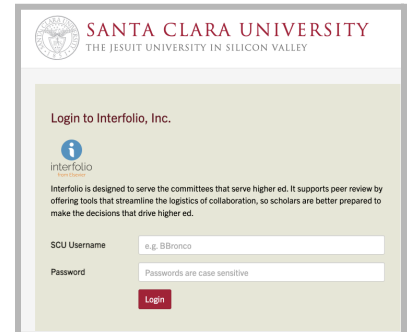
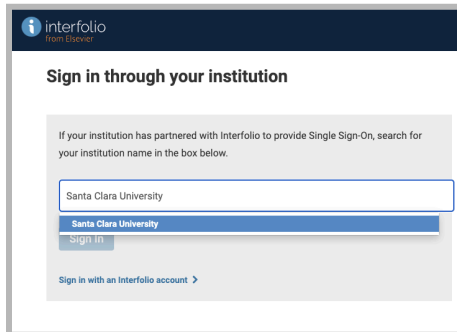
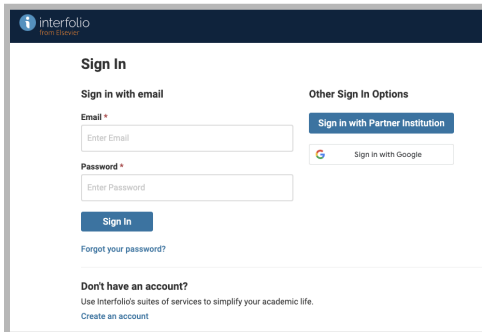
**A**



Sign into MySCU

Click on the Interfolio tile

**B**

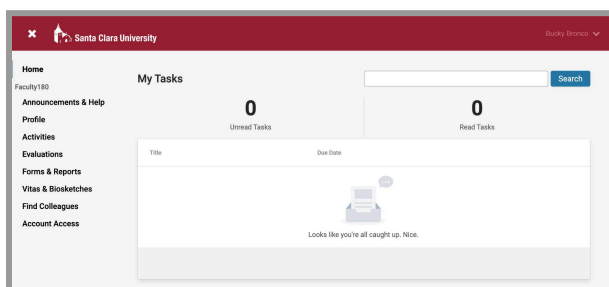


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

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

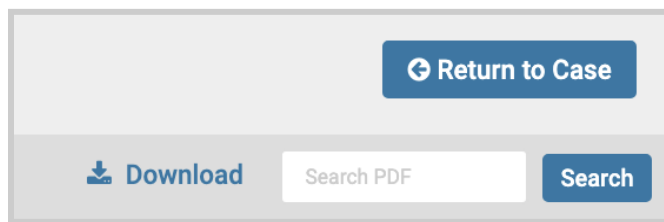
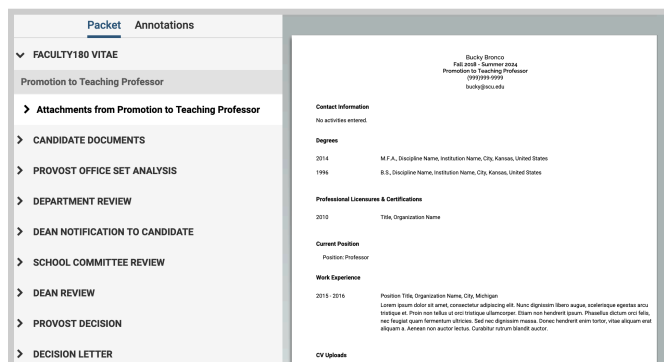
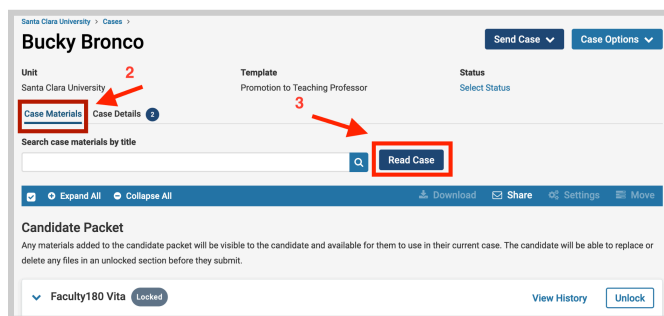
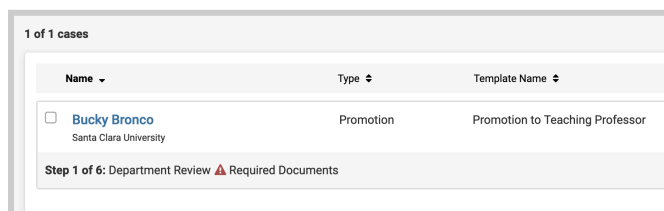


After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this. If it doesn't, you may be logged in to another Interfolio account. Contact Katie Williams ([kfwilliams@scu.edu](mailto:kfwilliams@scu.edu)) to help you troubleshoot.

## STEP 2 - REVIEW THE CASE

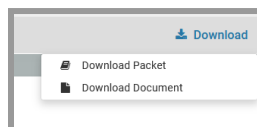
All (full) teaching professors and tenured faculty participating in the review will be given access to the candidate's case materials through Interfolio when the candidate submits their case.

A trigger with the candidate's name will appear on your dashboard. Note: The images below are from a promotion to teaching professor case. The type and template name of the case you are reviewing will differ depending on the process for which the candidate is applying: reappointment (only), reappointment and promotion to associate (hybrid), or promotion (only, to either associate or full).



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 email when the download has completed.



In addition to the candidate's materials, the sections in the left sidebar include the **Provost Office SET Analysis**. This document provides a summary of course SET report averages and comparison to department and school averages for the period under review, excepting the initial online quarters during COVID (Winter and Spring 2020).

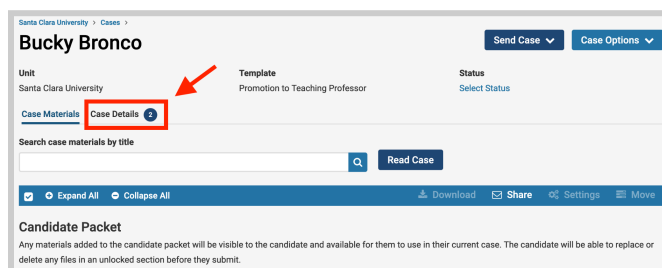
5. To exit the case materials, click the blue **Return to Case** button in the top right.

The department will review the candidate's materials, meet to discuss them and prepare a report and recommendation that the process chair will upload to Interfolio. A template for the department report is available on the Provost Office's [Evaluation, Reappointment & Promotion](#) page, at both the Reappointment section (“Assistant Teaching Professor Reappointment”) and at the Promotion section (“Rank & Promotion, Teaching-track Faculty”).<sup>1</sup> The template can be customized for the requirements of the specific process. This report may be shared and edited in Google Drive, and participants may sign the final form electronically or manually.

**The remaining steps are for the process chair alone**

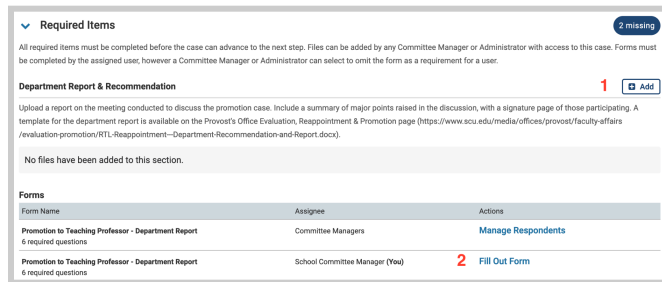
## STEP 3 - COMPLETE REQUIRED STEPS

The department or process chair will submit one required document and fill out one required form at the Case Details tab. The required document is limited to a single uploaded file, so the signature page should be merged with the department report before a PDF is uploaded to Interfolio. 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.



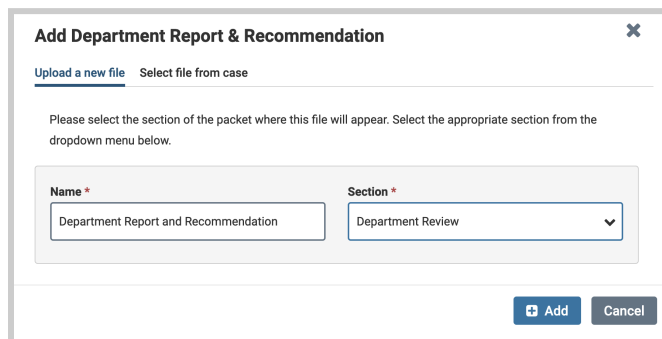
Click the **Case Details** tab at the upper left. This section will reveal the department’s required items. There are two required items regardless of the type of case, but the *name* of the item will depend on the type of case:

1. Required Document: [Process Name] Report & Recommendation
2. Required Form: [Process Name] - Department Recommendation(s)



### 1. Required Document

Click on the **Add** button to upload the department Report & Recommendation (PDF). A pop-up window will allow you to browse your computer for the report.



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

<sup>1</sup> Here is a direct link to the [Department Report Template](#).

Santa Clara University > Cases > Bucky bronco

### Reappointment and Promotion to Associate Teaching Professor (hybrid) - Department Recommendations

This form is used by the department to indicate the overall recommendation (reappoint and promote, reappoint and do not promote, do not reappoint or promote), as well as the separate recommendations on reappointment and promotion. You will find an Interfolio guide and video tutorial for the school committee on the Provost's Office Evaluation, Reappointment & Promotion page.

**Overall Recommendation**

What is the overall recommendation of the department? \*

Reappoint and promote (select this option if the reappointment and promotion recommendations are "highly recommend" or "recommend")

Reappoint and do not promote (select this option if the reappointment recommendation was "highly recommend or recommend," and the promotion recommendation was "do not recommend")

Do not reappoint or promote (select this option if both processes yielded "do not recommend" recommendations)

**Reappointment**

Reappointment recommendation \*

Please indicate the department's recommendation for reappointment to a three-year term as Assistant Teaching Professor, regardless of the department's recommendation on promotion to Associate rank.

Highly Recommend

Recommend

Do Not Recommend

**Promotion**

Promotion Recommendation \*

Please indicate the department's recommendation on promotion to Associate rank, regardless of the department's reappointment recommendation.

Highly Recommend

Recommend

Do Not Recommend

Number of Highly Recommend Votes \*

Number of Recommend Votes \*

Number of Do Not Recommend Votes \*

Number of faculty who participated in voting \*

Have you uploaded the department report summarizing the major points raised and the signature page of the participating faculty verifying the report is an accurate summary of the discussion? \*

Do not fill out this question until the answer is "yes."

Yes

No

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

## 2. Required Form

We show the hybrid form (left) because it includes elements found on forms for all case types.

Click **Fill Out Form** under Actions; a form like this will pop-up.

- If the case involves both reappointment and promotion (hybrid process), there will be a section at the top to indicate the overall recommendation.
- If the case involves a reappointment review for an Assistant Teaching Professor, there will be an additional section for the consensus recommendation on reappointment (no vote tally).
- If the case involves promotion, there will be a section for the department to indicate the consensus department recommendation on promotion and the confidential ballot tally.

Fill in the appropriate fields, Then click in this sequence:

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

## STEP 4 - SEND CASE FORWARD

Santa Clara University > Cases > Bucky Bronco

**Send Case** **Case Options**

Unit: Santa Clara University | Template: Promotion to Teaching Professor

Forward to: Dean Notification to Candidate | **Select Status**

Case Materials | **Case Details**

Reviewing as: Department Committee

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**Send Case Forward** ✕

Great job! You're sending the case forward to the next step, Dean Notification to Candidate. The following reviewers will lose access to the case:

Department Committee | 1 members

The following reviewers will gain access to the case:

Dean | 0 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 \***

Bucky Bronco Case Ready for Review

**Message \***

**Preview** **Continue** **Cancel**

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

*Note: This pop-up will read "Dean Decision" in reappointment only cases, and "Dean Notification to Candidate" in hybrid or promotion only cases.*

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.