Rank, Tenure and Promotion using Interfolio

Instructions for the Provost

Overview

Step	Page

Provost & Vice Provost

1. Login to Interfolio — 2
Use the tile at the MySCU single sign-on portal.

2. Review the Cases — 3-4
Read the case materials in Interfolio to inform your evaluation and recommendation to the President.
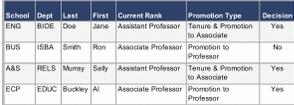
3. Convey Decisions to Provost Staff — 4
After discussing the cases with the President, the Provost conveys the President's decisions to the Director of Faculty Personnel outside Interfolio.

Provost Office Staff

4. Notify Candidate — 5
Send the decision letter to the candidate outside of Interfolio.
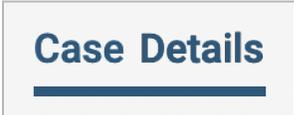
5. Upload Decision Letter — 5
Upload the letter to the "required document" at the Case Details tab.

6. Change the Status of the Case — 6
After the period for appeal has passed, change the status of the case to reflect the President's decision and close the case.

STEP 1 - LOGIN TO INTERFOLIO

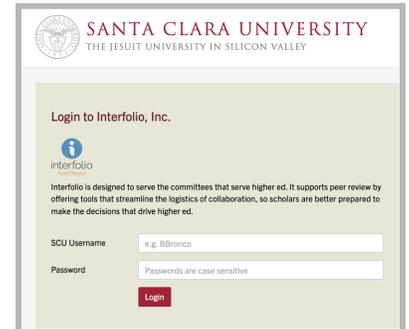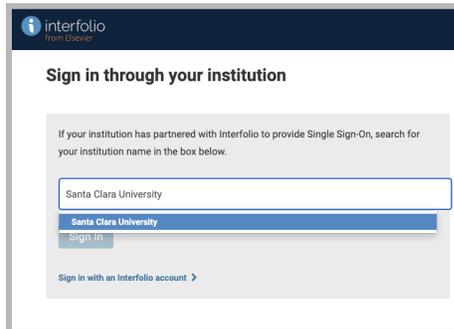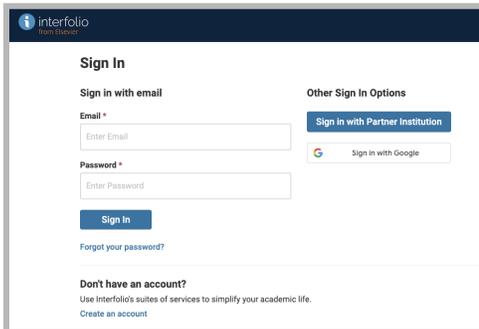**You can login to Interfolio one of two ways (A or B):**

A
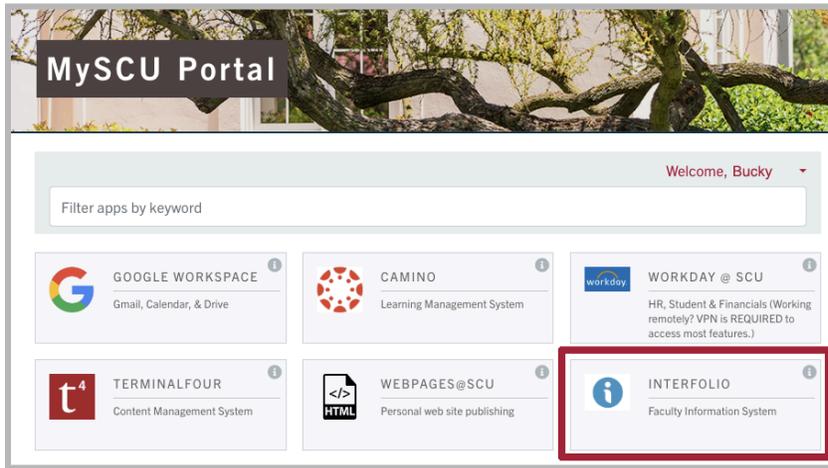
Sign into MySCU

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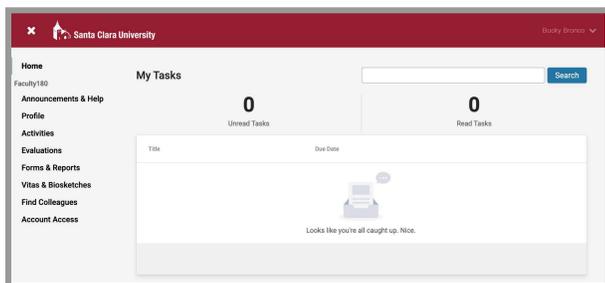
After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this (there may be cases in the central white window). If your screen doesn't look like this, you may be logged in to another Interfolio account. For troubleshooting support, contact Katie Williams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

STEP 2 - REVIEW THE CASE

The Provost is given access to the candidate's case through Interfolio when it is forwarded from the university committee. A trigger with the candidate's name will appear on your dashboard:
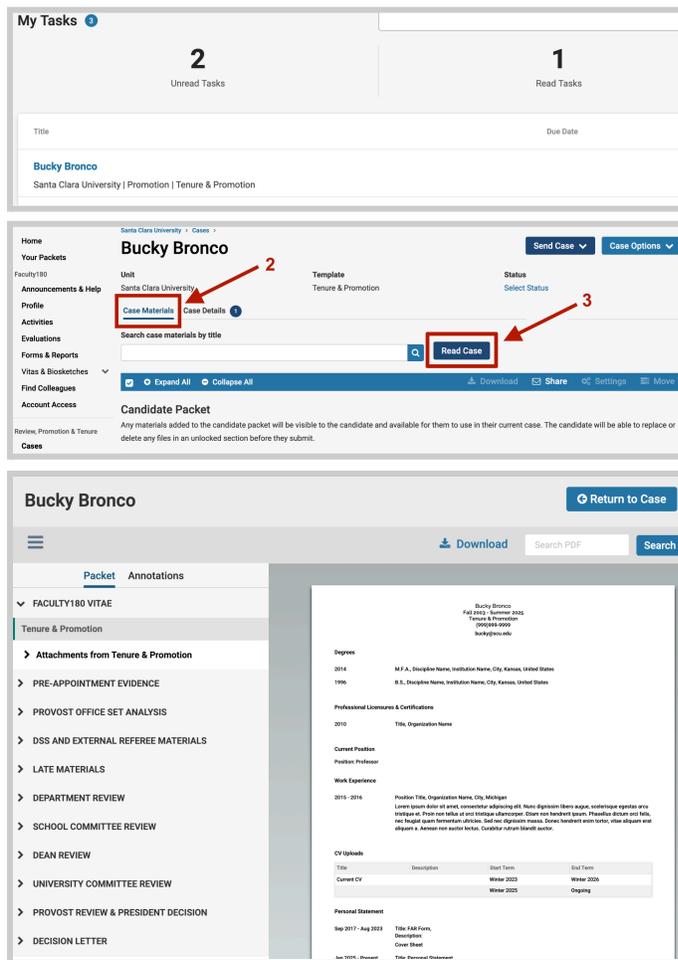

1. Click on the candidate's name in blue to bring you to the candidate's packet.

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.
- **University Committee Review** - The university committee's evaluation and recommendation.
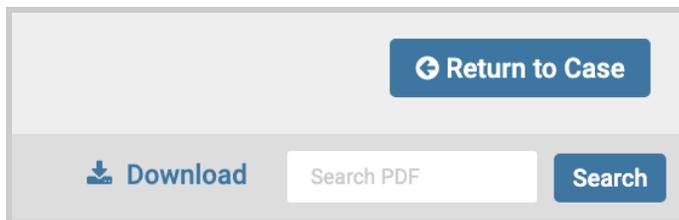
5. To exit the case materials, click the blue **Return to Case** button in the top right.

STEP 3 - CONVEY DECISIONS TO PROVOST STAFF

The Senior Manager for Faculty Affairs will prepare a spreadsheet listing all of the candidates for tenure and/or promotion and share it with the Provost Committee on Google Drive. The Vice Provost for Academic Affairs will review the cases and log the votes at each stage of review on the spreadsheet, adding notes as necessary. The Provost will discuss the cases with the President, and the President'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	School Cmte	Dean	University Cmte	PRESIDENT'S Decision
ENG	BIOE	Doe	Jane	Assistant Professor	Tenure & Promotion to Associate	5, 4, 4, 5, 5	5, 4, 5, 5	Yes	5, 5, 5, 4, 5, 4	Yes
BUS	ISBA	Smith	Ron	Associate Professor	Promotion to Professor	3, 1, 2, 1	2, 2, 1, 1, 1	No	1, 2, 2, 1, 2, 2	No
A&S	RELS	Murray	Sally	Assistant Professor	Tenure & Promotion to Associate	4, 4, 3, 5, 4, 4	4, 4, 4, 4, 5	Yes	4, 4, 4, 3, 4	Yes
ECP	EDUC	Buckley	Al	Associate Professor	Promotion to Professor	3, 4, 3, 4, 4	3, 4, 4, 4, 4	Yes	4, 4, 4, 4, 4, 3	Yes

The remaining steps are for the Provost Office staff

# STEP 4 - NOTIFY CANDIDATE

The Provost Office staff will draft decision letters and email them to each candidate.

STEP 5 - UPLOAD DECISION LETTER

You will then upload the letter you sent to the candidate to the Interfolio case.

1. Click the **Case Details** tab at the upper left. This section will reveal the one required item at this step (note the "1" on the blue badge to the right of "Case Details," which indicates the number of required items for this step): Tenure & Promotion Decision Letter (required document).
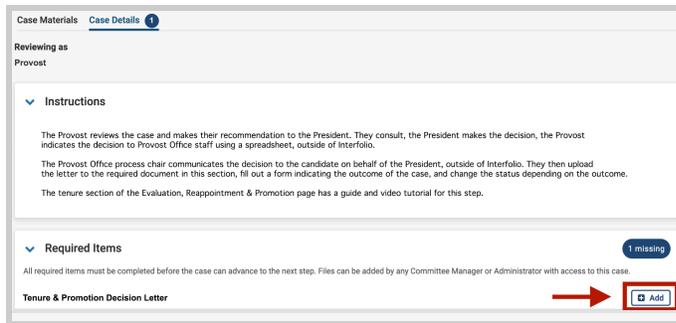
2. Open the "Required Items" section by clicking on the caret to the left of the title. Click on the **Add** button to the right of the "Tenure & Promotion Decision Letter" to upload the file. A pop-up window will allow you to browse your computer for the document.
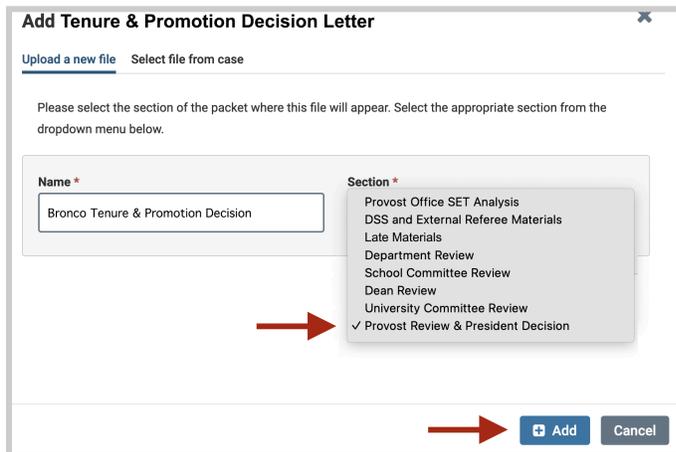
3. After uploading the document from your computer, this screen will pop-up. In the Section field, select "Provost Review & President Decision." Then click the blue **Add** button (bottom right) to submit.

STEP 6 - CHANGE THE STATUS OF THE CASE

Change the status of the case to indicate the President's decision. This signals to Faculty Affairs staff that all steps have been completed. Faculty Affairs will close the cases after the period for appeal closes.
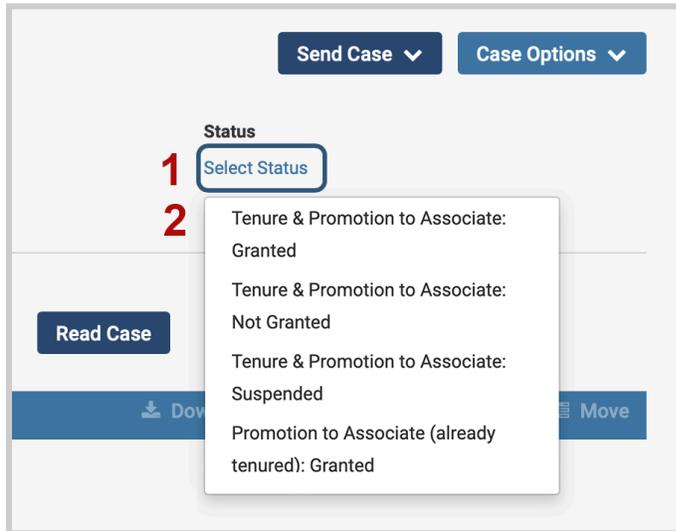
1. Click **Select Status**

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.