# Mid-Probationary Review using Interfolio

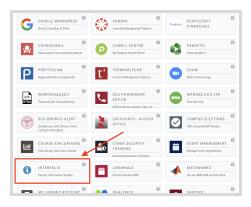
**Instructions for the Dean** 

### There are two ways to logon to Interfolio

1. Faculty180: https://www.scu.edu/interfolio

Click the Partner Institution button.	Sign In	~	
	Sign in with	email	Or sign in with:
	Email *		Partner Institution
	Enter Email	×	
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## 2. Click on the Interfolio tile on your SCU SSO page.





#### Check Your SCU Interfolio Dashboard

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 Pandora del Carmen (pdelcarmen@scu.edu) to help you troubleshoot.

# PART 1 - Reviewing the Department Evaluation

Santa Clara University | Review | Mid-Probationary Review

Q Read Case

Template

**Bucky Bronco** 

Bucky Bronco Unit Santa Clara Universi

Case Materials Case Details

Search case materials by title

You can review the department evaluation when the case is shared with you. A trigger with the candidate's name will appear on your dashboard:

Send Case 🗸 🛛 Case Options 🗸

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

- 2. The following sections are available at the Case Materials tab (upper left) of the candidate packet:
  - a. Faculty180 Vita
  - b. Candidate Documents
  - c. Provost Office SET Analysis
  - d. Internal Sections only available to individuals reviewing the case

3. Click the **Read Case** button on the right to review the candidate's MPR packet and system-generated curriculum vitae for the period under review.

2

O Expand All O Collapse All	📥 Download	⊠ Share	Ø <sub>6</sub> Settings	≣i Move
andidate Packet y materials added to the candidate packet will be visible to the candidate and available for them : es in an unlocked section before they submit.	to use in their current case. Th	e candidate will	be able to replac	e or delete ar
Faculty180 Vita Looked		Vie	ew History	Unlock
> Provost Office SET Analysis Locked			0 [	Unlock
Internal Sections was sections are available to committee members reviewing the case and cannot be viewed by th e shared with the candidate by an administrator or committee manager.	te candidate. Please note that	some materials	added to interna	I sections ca
Provost Office: Confirmation of Candidate Materials			Edit	Add File
> Department Evaluation			Edit	Add File
> Dean Recommendation			Edit	Add File
> Provost Review			Edit	Add File
> Provost Office: Notification to Candidate			Edit	Add File
anta Clara University > Cases >				

Bucky Bronco		Send Case V Case Options V
Unit	Template	Status
Santa Clara University	Mid-Probationary Review	Select Status
Case Materials Case Details 1		
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Bucky Bronco	
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Packet Annotations	
FACULTY180 VITAE     PROVOST OFFICE SET ANALYSIS     PROVOST OFFICE CONFIRMATION OF CANDIDATE     MATERIALS     DEPARTMENT EVALUATION     Buckys Written Evaluation & Cover Sheet with Signatures     DEAN RECOMMENDATION     PROVOST REVIEW     PROVOST OFFICE: NOTFICATION TO CANDIDATE	Bucky's department written evaluation and signature cover sheet

 The left sidebar lists the sections of the candidate packet. Click on the > (caret) symbol next to Department Evaluation to expand the section and view the contents. Click on the Department Evaluation. You'll see the Department Evaluation in the main window on the right.

# How to Exit the Faculty180 Vitae Section

	G Retur	n to Case
🛓 Download	Search PDF	Search

Click the blue **Return to Case** button in the top right to exit.

## PART 2 - Submitting Dean Recommendation to Provost

When you have finished reviewing the department's evaluation letter, you will upload the dean recommendation letter to the Provost.

it	Template	Status	
nta Clara University	Mid-Probationary Review	Select Status	
ase Materials Case Details 1			
viewing as			
an Recommendation			
> nstructions			
<ul> <li>Required Items</li> </ul>	e the case can advance to the next step. Files can be added by any Com	nitee Manager or Administrator with access to this case	1 missing
Required Items      Marguied Items must be completed befor      Dean Recommendation      The dean will review the materials provided      the area case where the dean is considering      ensured facily monthers before submitting	by the department. If the dean agrees with the department's recommen a decision different from the recommendation of the department, the d a written recommendation to the Provost. In the rare case where the Pr- event with the department chair, participant terward faculty members, a	allon, the dean submits a written recommendation to the Provost In an will discuss the case with the department chair and other particip roat is considering a decision different from the recommendation of	Add Interfolio. pating f either the

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

1. Dean Recommendation

#### Step 1 - Upload Dean Recommendation

Click on the **Add** button to upload the letter. A pop-up window will allow you to browse your computer for the letter.

Please select the section of t	he packet where t	nis file will ap	opear. Select the appr	opriate section fr	om the
dropdown menu below.					
Name *		Se	ction *		
Dean Recommendation Let	ter	[	Dean Recommendation	n	~
L					

Send Case 🗸

Forward to

**Provost Decision** 

Backwards to

Department Section: Evaluation

Case Options 🗸

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

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

Send Case Forward	×
Great job! You're sending the case forward to the next step, Provost Decision. The following reviewers will lose access to the case:	
Dean Recommendation   1 members	
The following reviewers will gain access to the case:	
Provost Decision   1 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 *	
Message Subject	
Message *	
$\begin{tabular}{c c c c c c } \hline $B$ & $I$ & $I_x$ & $	
Dear committee members,	
This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.	
Best, Dean #1	
Preview     Continue     Cance	el

The blue Continue button 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.