Mid-Probationary Review using Interfolio

Instructions for the Provost

There are two ways to logon to Interfolio

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

Click the Partner Institution button.	Sign in write enail Bign in write enail Deal * Autoral address torgand Parent * Tearrot respect Parge nor respect Parge nor passence?
Search for "Santa Clara University" and click the Sign In button.	Sign in through your institution If your institution has partnered with interfolio to provide Single Sign-On, search for your institution name in the box below. Santa Clara University Q Sign In
Log in with your single sign-on credentials.	Regin k utilitati ka

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 Dean Recommendation

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

Send Case 🗸 🛛 Case Options 🗸

1. Click on the candidate's name **Bucky Bronco** Santa Clara University | Review | Mid-Probationary Review

2. The following sections are available at the Case Materials tab (upper left) of the candidate packet:

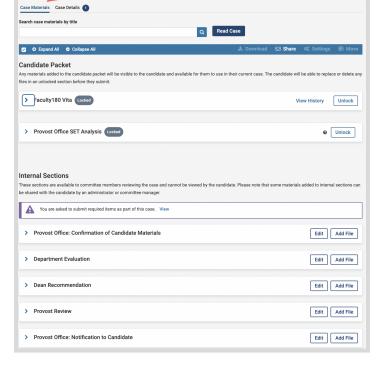
in blue to bring you to the

candidate's 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 systemgenerated curriculum vitae for the period under review.

Bucky Bronco		Send Case 🗸 Case Option
Unit	Template	Status
Santa Clara University	Mid-Probationary Review	Select Status
Case Materials Case Details 1		
Search case materials by title		
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O Expand All O Collapse All Candidate Packet Any materials added to the candidate pack	ket will be visible to the candidate and available for them to u	📥 Download 🖂 Share 📽 Settings 🧮



Bucky Bronco

Unit Santa Clara Univ

Bucky Bronco	
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Packet Annotations	
> FACULTY180 VITAE	
> PROVOST OFFICE SET ANALYSIS	
PROVOST OFFICE: CONFIRMATION OF CANDIDATE MATERIALS	Bucky's Dean Evaluation
> DEPARTMENT EVALUATION	
V DEAN RECOMMENDATION	
Dean Recommendation Letter	
> PROVOST REVIEW	
> PROVOST OFFICE: NOTIFICATION TO CANDIDATE	

4. The left sidebar lists the sections of the candidate's packet. Click on the > (caret) symbol next to Dean Recommendation to expand the section and view the contents. Click on the Dean Recommendation Letter. You'll see the dean's recommendation letter in the main window on the right.

How to Exit the Faculty180 Vitae Section

	G Return	to Case
🛓 Download	Search PDF	Search

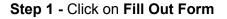
Click the blue **Return to Case** button in the top right to exit.

PART 2 - Completing the Required Form

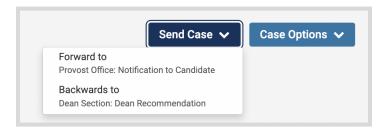
When you have finished reviewing the dean's recommendation letter, you will complete the required form in Interfolio. You will notify the candidate of the decision in writing **via email**, copying the dean and department chair. Provost Office staff will follow up later and upload the notification in Interfolio.

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anta Clara University	Mid-Probationary Review	Select Status
Case Materials Case Details 🕕		
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rovost Decision		
omit the form as a requirement for a user.	ase can advance to the next step. Forms must be completed by the	resal
All required items must be completed before the c	ase can advance to the next step. Forms must be completed by the Assignee	
All required items must be completed before the c omit the form as a requirement for a user.		assigned user, however a Committee Manager or Administrator can select

Click the **Case Details** tab at the upper left. This section will reveal the single item required from the Provost under Required Items: Forms



Mid-Probationary Review - Provost Review		
Do you recommend retention for this candidate? * Yes No 		
Submit Form Save Responses Return to Case		



Send Case Forward	:
Sreat job! You're sending the case forward to the next step, Provost Office: Notifi eviewers will lose access to the case:	cation to Candidate. The following
Provost Decision 1 members	
he following reviewers will gain access to the case:	
Provost Office - Administrators 1 members	
Send a message to the reviewers gaining access.	
If recipients respond to this message, their response will come directly to you	r email inbox.
Subject *	
Message Subject	
Message*	
$\boxed{\square} \ \boxed{\square} \ \boxed{B} \ \boxed{I} \ \boxed{I_x} \ \boxed{=} \ \overrightarrow{=} \ \overrightarrow{=} \ \overrightarrow{=} \ \overrightarrow{=} \ \boxed{\square} \ \Omega$	
Dear committee members,	
This case is coming your way for review. You'll be able to see the documents and deadlines in F sign in.	Review, Promotion & Tenure when you
Best, Provost SCU	
Provost SCU	
Preview	Continue Cancel

Step 2 - Complete the form, then click the **Submit Form** button.

* Note: this brief form assists Provost's Office staff with tracking Provost recommendations and generating notices to candidates.

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

* Provost Office staff will upload the Provost letter and share the letter with the candidate in Interfolio.

The blue Continue button in the 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.