

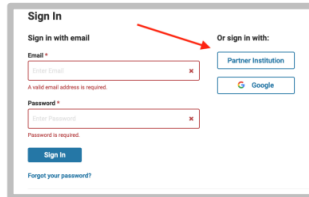
Senior Lecturer Promotion using Interfolio

Instructions for the School or College Committee

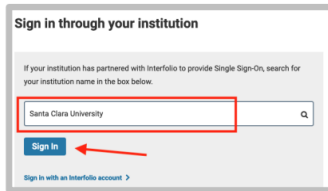
There are two ways to logon to Interfolio

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

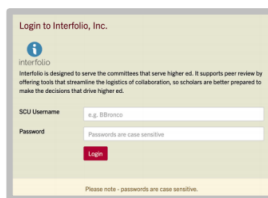
Click the Partner Institution button.



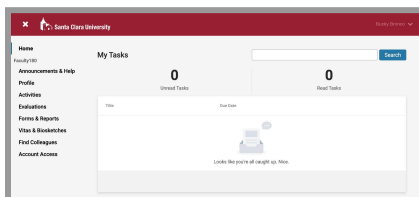
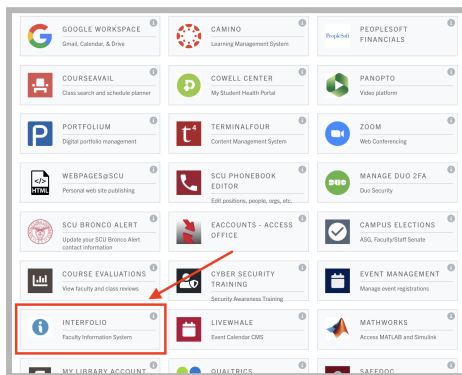
Search for "Santa Clara University" and click the Sign In button.



Log in with your single sign-on credentials.



2. Click on the Interfolio tile on your SCU SSO page.

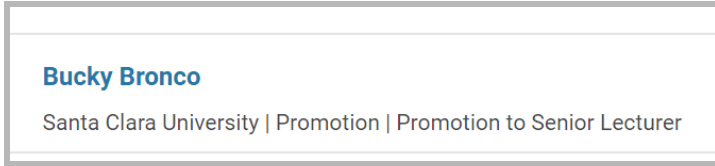


Check Your SCU Interfolio Dashboard

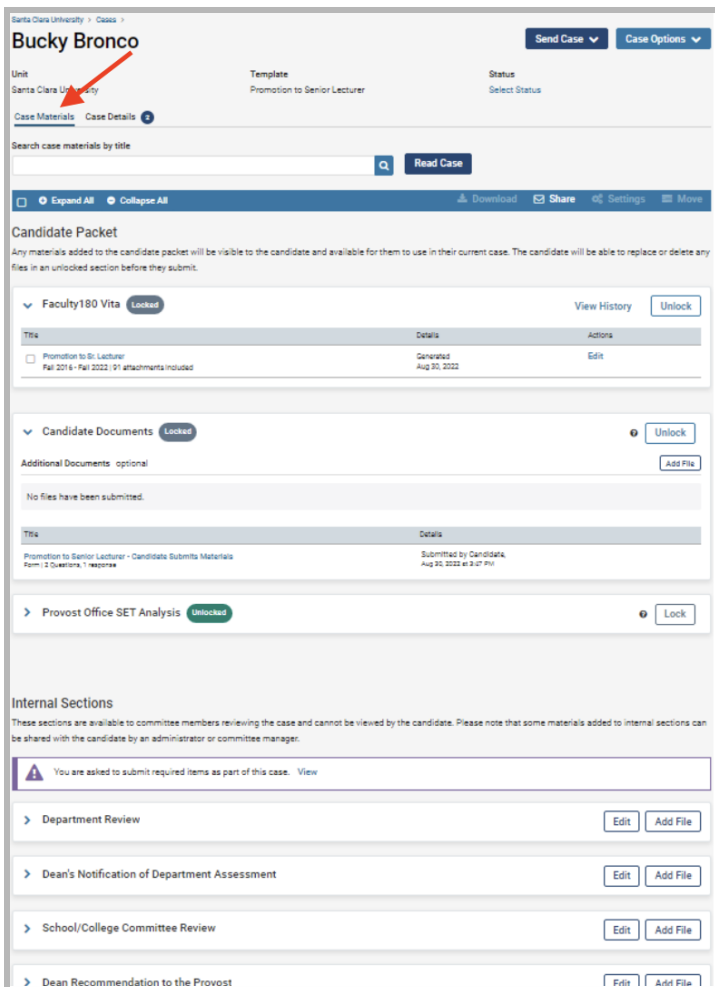
After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this. If it doesn't, you may be logged in to another Interfolio account. Contact Pandora del Carmen (pdelcarmen@scu.edu) to help you troubleshoot.

PART 1 - Reviewing the Candidate Vita and Packet

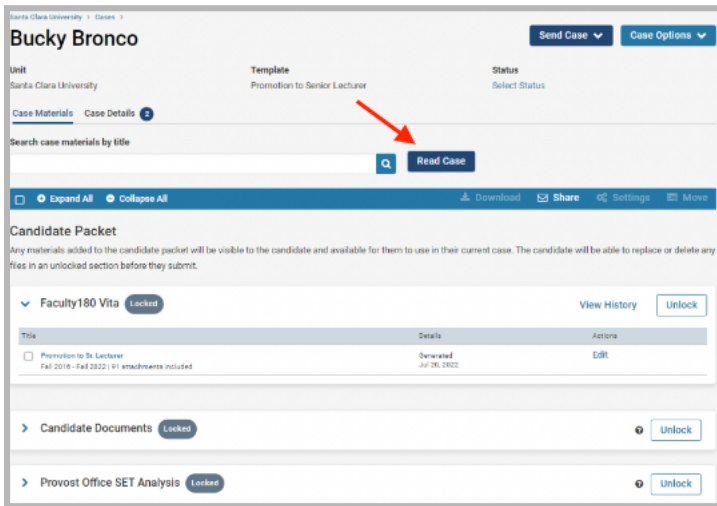
The vita is a document that Interfolio automatically generates from the entries the candidate has made in the Activities section of Faculty180 for their review period. You can preview their vita and packet when their case is shared with you. A trigger with the candidate's name will appear on your dashboard:



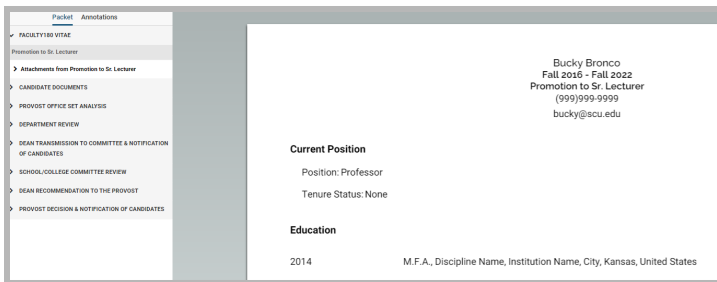
1. Click on the candidate's name in blue to bring you to the Candidate's packet.



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

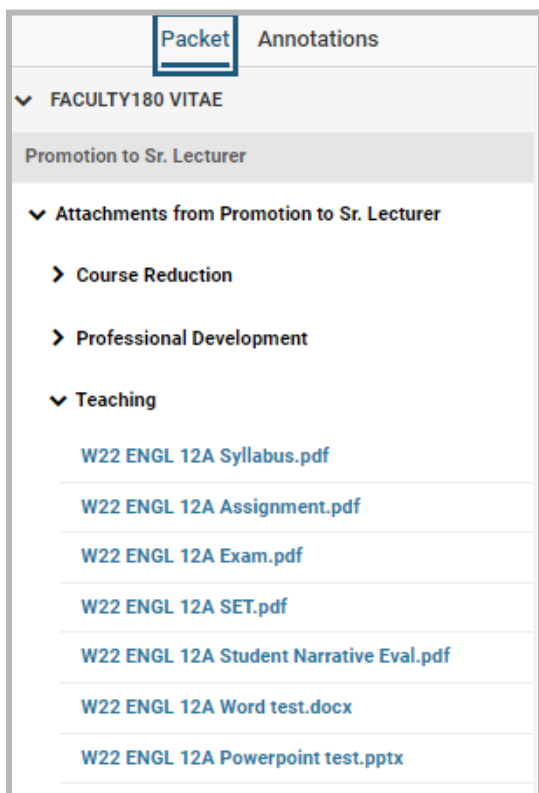


3. Click the **Read Case** button on the right to review the candidate's Promotion to Senior Lecturer packet and system-generated *curriculum vitae* for the period under review.



4. The left sidebar lists the sections of the candidate packet. Click on any › (caret) symbol to expand the section and view the contents. In the main window, you'll see the system-generated *curriculum vitae* for the period under review.

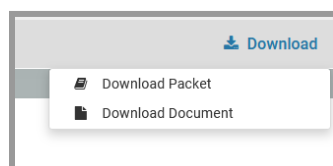
Review Faculty180 Vitae Documents



Click on **Faculty180 Vitae** in the left sidebar to view the order and titles of the uploaded documents. Click on any > (caret) symbol to expand the section.

Activity categories are listed in the order they appear in the candidate's Faculty180 Activities listing. Within the Teaching section, files are listed by course in chronological order beginning with the most recent term, with titles assigned by the candidate.

You can click on any document to view it in the browser window. You can increase the size of the document in the window using the zoom tool in the lower left. If you need to compare two documents, such as two versions of a syllabus, you can open another browser window and login to Interfolio, navigating to the appropriate second document in the case.

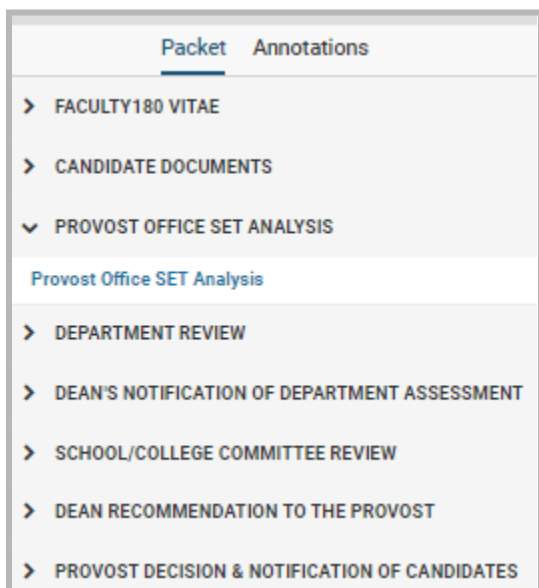


You can also download an individual document, or the entire Faculty180 Vitae packet, using the blue **Download** button in

the upper right of the browser window. If you choose to download the packet, you can do that either as a zip file of the individual documents (which retains the folder hierarchy) or as a single PDF (in linear sequence).

You will receive an email when the download has been completed. Login to Interfolio and click on "Your Files Are Ready to Download" on your dashboard to access the file.

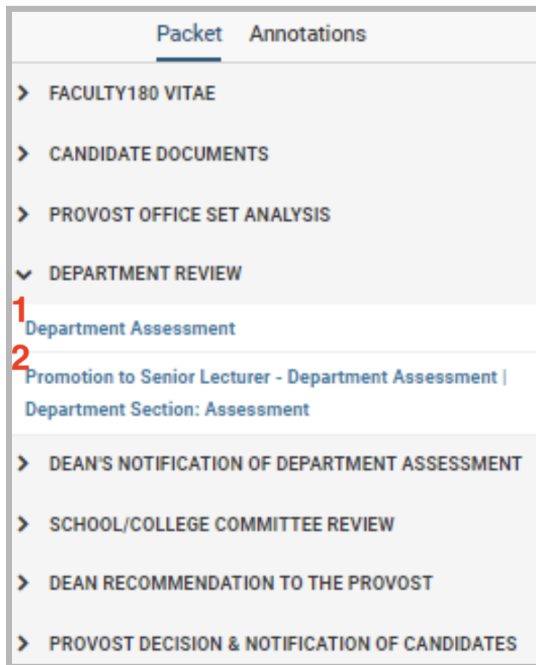
Provost Office SET Analysis



Click on the > (caret) next to Provost Office SET Analysis in the left sidebar to view that document. The SET Analysis lists the candidate's scores for all sections during the period under review (except Winter, Spring, and Summer 2020*), and compares these to other faculty in their department and school (in the College of Arts & Sciences, scores are compared by disciplinary cluster as well).

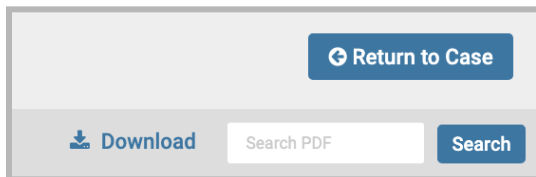
** If a candidate carried part of their academic year course load in Summer 2020, those sections will also not appear. Faculty were allowed to opt-in to the use of SETs for faculty evaluation for all initial COVID-19 quarters.*

Department Review



To read the department review of the candidate's petition, click on the > (caret) next to Department Review in the left sidebar. Two files will appear: 1) Department Assessment Letter (the report of the department's evaluation), and 2) Department Assessment Form (the vote results).

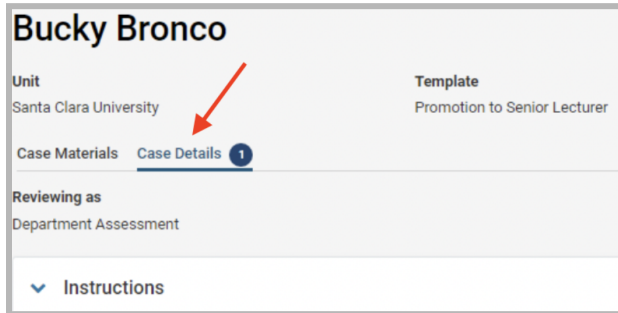
How to Exit the Faculty180 Vitae Section



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

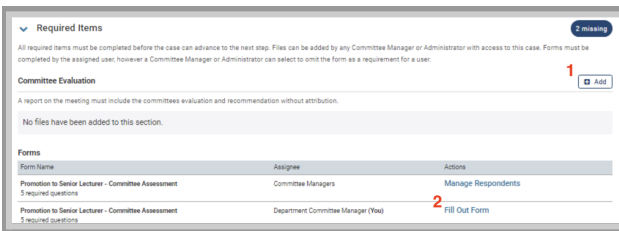
PART 2 - Submitting Committee Evaluation and Required Form (Committee Chair only)

When the committee has finished reviewing the candidate's vita and packet, has discussed and voted on the case, and has prepared its report, the college or school committee chair will submit the Committee Evaluation and complete the required form.



The screenshot shows the 'Bucky Bronco' interface. At the top left, the 'Unit' is 'Santa Clara University' and the 'Template' is 'Promotion to Senior Lecturer'. Below this, there are two tabs: 'Case Materials' and 'Case Details', with 'Case Details' being the active tab and marked with a '1' and a red arrow. Underneath the tabs, it says 'Reviewing as Department Assessment'. At the bottom, there is a 'Instructions' section with a downward arrow.

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



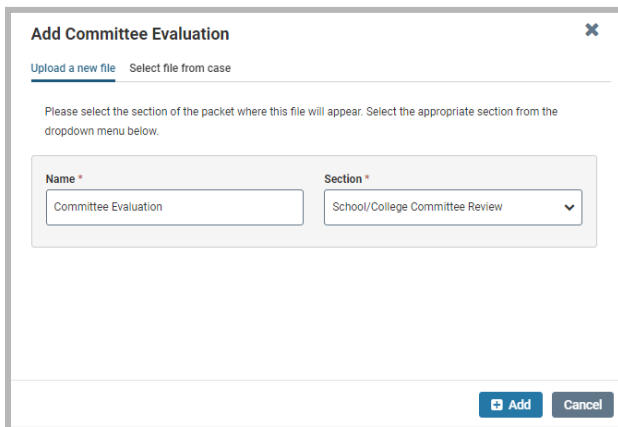
The screenshot shows the 'Required Items' section. It includes a note: 'All required items must be completed before the case can advance to the next step. Files can be added by any Committee Manager or Administrator with access to this case. Forms must be completed by the assigned user; however a Committee Manager or Administrator can select to omit the form as a requirement for a user.' Below this, there is a table of forms:

Form Name	Assignee	Actions
Promotion to Senior Lecturer - Committee Assessment 5 required questions	Committee Managers	Manage Respondents
Promotion to Senior Lecturer - Committee Assessment 1 required questions	Department Committee Manager (You)	2 Fill Out Form

1. Committee Evaluation
2. Required Form

Step 1 - Upload Committee Evaluation

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



The screenshot shows a pop-up window titled 'Add Committee Evaluation'. It has two options: 'Upload a new file' (selected) and 'Select file from case'. Below this, there is a text prompt: 'Please select the section of the packet where this file will appear. Select the appropriate section from the dropdown menu below.' There are two input fields: 'Name *' with the text 'Committee Evaluation' and 'Section *' with a dropdown menu showing 'School/College Committee Review'. At the bottom right, there are 'Add' and 'Cancel' buttons.

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

Promotion to Senior Lecturer - Committee Assessment

The composition and procedures for the school Promotion to Senior Lecturer Committee are detailed on pp. 4-5 of the University Procedures for Promotion to Senior Lecturer document. To complete the committee evaluation and recommendation, please fill out the questions below, including confirmation that you have uploaded a report supporting your recommendation.

Committee materials to be submitted by committee chair

Please complete the committee report in the text box below.

What is the overall recommendation of the committee? *

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 *

[Submit Form](#) [Save Responses](#) [Return to Case](#)

Step 2 - Submit Required Form

After clicking on **Fill Out Form** under Actions, this form will pop-up.

Complete the form, filling in the general consensus of the committee with the radio buttons (highly recommend, recommend, do not recommend), and then the number of votes for each option. Indicate the total number of faculty participating in the vote. Then click in sequence on:

1. **Save Responses** button
2. **Submit Form** button

[Send Case](#) ▼

Forward to
Dean Section: Dean Assessment

Backwards to
Dean Section: Dean's Notification of
Department Assessment

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

Send Case Forward ✕

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

Committee Evaluation | 2 members

The following reviewers will gain access to the case:

Dean Assessment | 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 *

Message Subject

Message *

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,
Department Committee Manager

[Preview](#) [Continue](#) [Cancel](#)

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, and the Committee process.