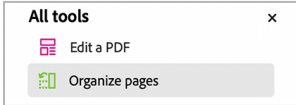


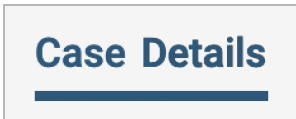




# Rank, Tenure and Promotion using Interfolio

## Instructions for the Dean Partner

### Overview

Step		Page
During the spring and summer		
	<b>1. Prepare Documents for Upload</b> Change file names, remove bookmarks, consolidate each external referee letter and CV into one file. Merge works sent to external referees into one file and add bookmarks to that file for each component document.	2
When the petition is submitted to you		
	<b>2. Login to Interfolio</b> Use the tile at the MySCU single sign-on portal.	5
	<b>3. Check the Case</b> Check that the candidate has supplied the necessary materials for their petition.	6
	<b>4. Upload Standards to Case Details</b> You will upload the approved discipline-specific scholarship standards that the candidate has selected as the single required document at the Case Details tab.	7
	<b>5. Upload Other Documents to Case Materials</b> You will upload the professional CV, the materials sent to external referees, the list(s) of external referees and non-referees, and the referee letters at the Case Materials tab (DSS & External Referees section). You will upload collaborator letters materials (list, candidate objection, letter(s)), at the Case Materials tab (Collaborator Letters section).	8
	<b>6. Send Case Forward</b> Send the case forward to the department for the first stage of review.	10

# STEP 1 - PREPARE DOCUMENTS FOR UPLOAD

## DSS & External Referee Materials section

In spring and through the summer before the petition deadline, you will be collecting materials supplied by the candidate for external referees, as well as referee letters and CVs. These should be converted to PDF if not already in that format. Since the file name and bookmarks in a PDF will all appear in the sidebar of the case for subsequent reviewers, we recommend (but do not require) that you take the following steps to prepare the files for upload.

▼ DSS AND EXTERNAL REFEREE MATERIALS
ENVS Scholarship Standards (11.14)
Bronco Professional CV
Bucky Bronco Works to be Evaluated
Cover Letter
Environmental Logic AABS 2023
Everglades Insects FENT 2022
Fruitfly Populations AESA 2021
Impact of Water ASWR 2024
Insect Habitat FR 2025
List of Referees and Non-Referees
Brown Letter and CV (school cmte)
Collins Letter and CV (school cmte)
Rogers Letter and CV (dept)
Smith Letter and CV (candidate)
Grande Letter and CV (dept)
Marshall Letter and CV (candidate)

1. **Discipline-specific scholarship standards.** GDrive *f* E. No changes need to be made; all files from the Provost's website already have a consistent naming convention:

**ENVS Scholarship Standards (11.16)**

2. **MOU.**<sup>1</sup> For faculty who have an MOU from the time of hire, use the naming convention:

**Lastname MOU**

3. Professional **Curriculum Vitae** (GDrive *f* C). Remove bookmarks from the PDF (if there are any) and use the naming convention:

**Lastname Professional CV**

4. **Works to be Evaluated** (GDrive *f* D). Remove bookmarks from each file and rename each using the following naming convention:

Journal: **Short Title JOURNALABBR year**

Bk Chptr: **Short Title (chptr) year**

Book: **Short Title (book) year**

Combine files into a single PDF in either alphabetical or date order. Add a bookmark at the start of each original file using the file name convention above. Save this combined file as:

**FirstName LastName Works to be Evaluated**

5. **List of Referees and Non-Referees** (GDrive *f* B). Combine candidate, department and school committee documents into one PDF file (no bookmarks needed). Naming convention:

**List of Referees and Non-Referees**

6. **External referee letters** (GDrive *f* B). Create a combined file for each referee, with the letter first and the CV after. For the source of the list, use "candidate" or "department" or "school cmte" in parentheses. The full naming convention is:

**LastName Letter and CV (department)**

---

<sup>1</sup> A small number of tenure-track hires appointed in 2023 and 2024 have a signed memorandum of understanding from the time of hire indicating that they could petition for tenure early and use some period of pre-appointment scholarship in their tenure petition. As of Fall 2025, this allowance became standard, making future MOUs unnecessary.

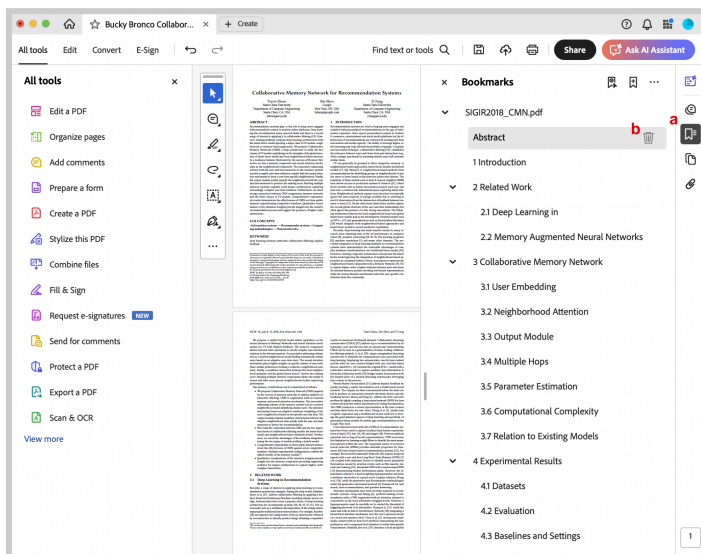
## Collaborator Letters section

Beginning with the Fall 2026 tenure and promotion cycle, departments have the option to request collaborator letters to better understand the character and quality of the candidate's contributions to co-created works (Faculty Handbook [3.4.4.2](#)). If the department identifies collaborators, there will be two or three types of documents you will add to the case from GDrive *f* F:

1. **Collaborator List (department)**. Naming convention:  
**List of Collaborators (department)**
2. **Candidate Objection**. There may not be one. If there is, the naming convention is:  
**Candidate Objection**
3. **Collaborator Letters**. The naming convention:  
**LastName Letter**

## Acrobat Tips

### Removing Bookmarks & Creating a Single PDF File from Multiple Files



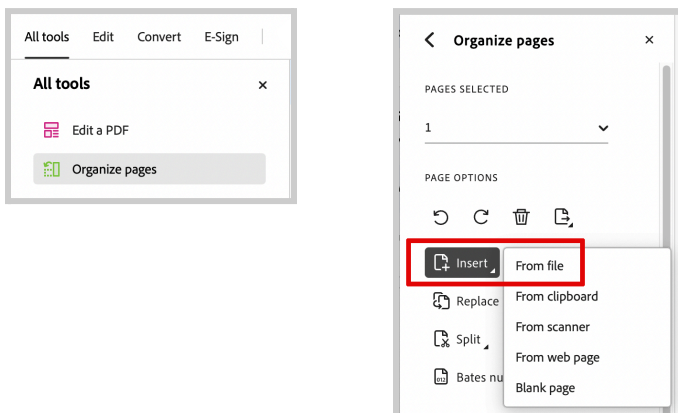
1. Remove all bookmarks from the files that will be merged. In each document,
  - a. click the bookmark tool to reveal the bookmarks in the file.
  - b. use the trash can next to each bookmark or group of bookmarks to delete them.

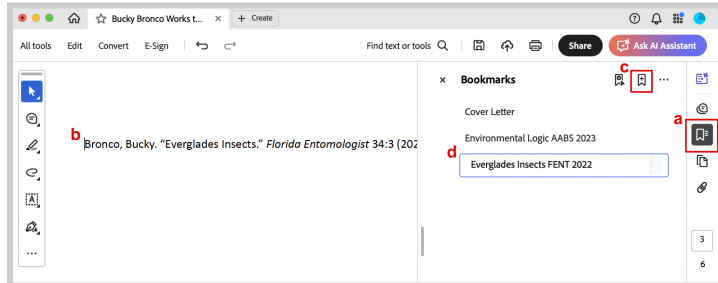
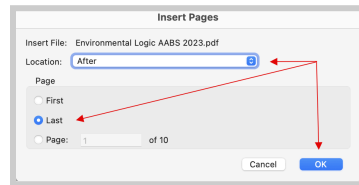
2. Open the first file in the group. For the works sent out to external referees, this will either be the dean's cover letter template to the referees or the first scholarship/creative activity sample. Save this file as:

**FirstName LastName Works to be Evaluated**

3. Use the **Organize** pages tool to **Insert > From file**. Browse for the second document in the series, and select **After** and **Last**, and click **OK**.

4. **Continue** this for each of the files in turn until all the works sent out for external referee review are in this single document, then save the file.



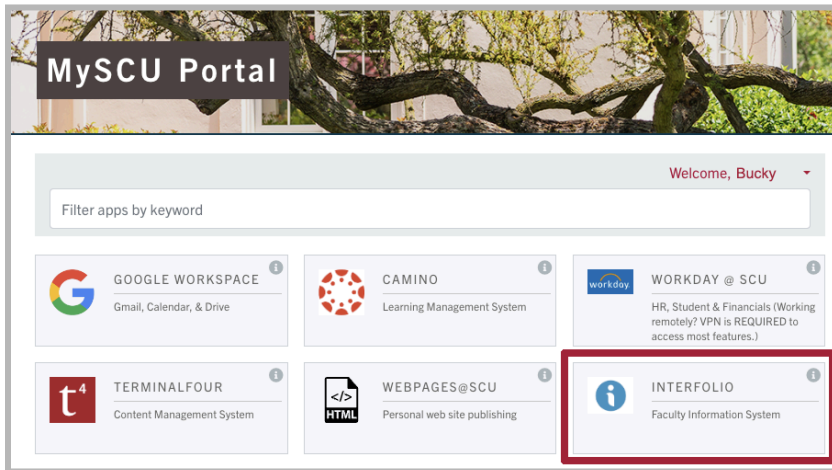


5. Add bookmarks for each component document, following these steps:
  - a. click the bookmark tool to reveal the bookmark pane,
  - b. put your cursor at the top the first component document,
  - c. click the add bookmark icon,
  - d. type the file name in the window and click the enter key,
  - e. move to the next component document, and repeat until each document has a bookmark.

## STEP 2 - LOGIN TO INTERFOLIO

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

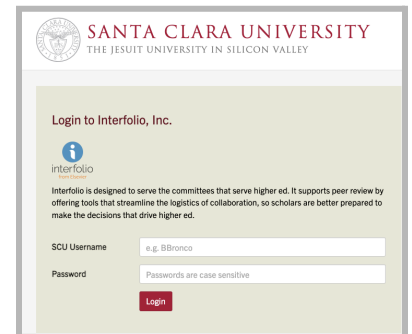
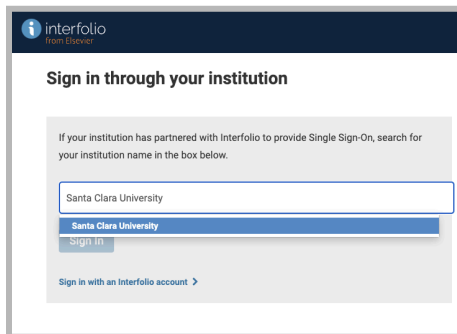
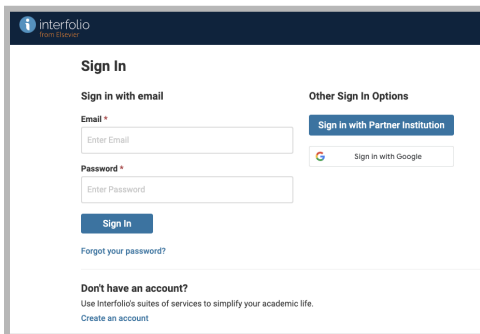
**A**



Sign into MySCU

Click on the Interfolio tile

**B**

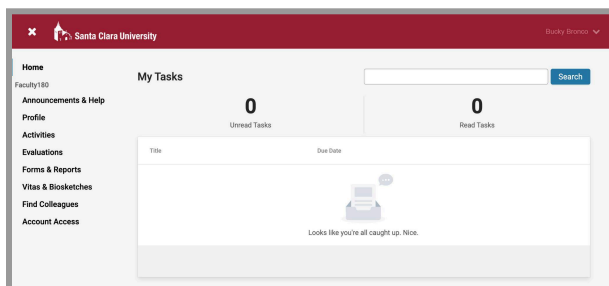


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

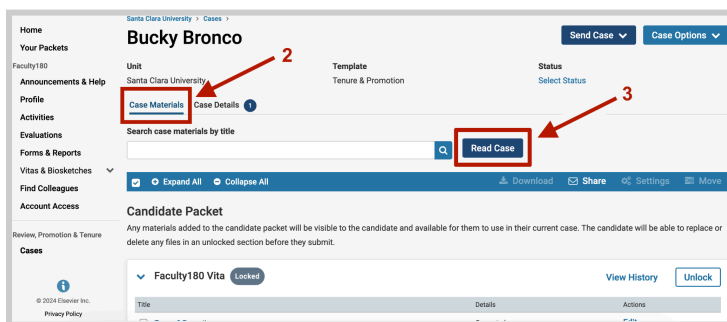
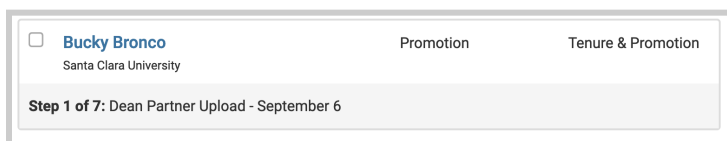
However you login, double-check that you're in the right account:



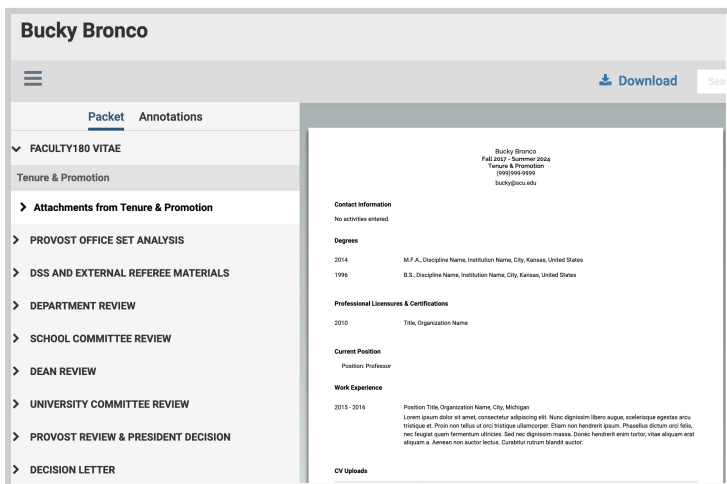
After you login, "Santa Clara University" should appear in the upper bar, and your screen should look like this. If it doesn't, you may be logged in to another Interfolio account. Contact Katie Williams ([kfwilliams@scu.edu](mailto:kfwilliams@scu.edu)) to help you troubleshoot.

## STEP 3 - CHECK THE CASE

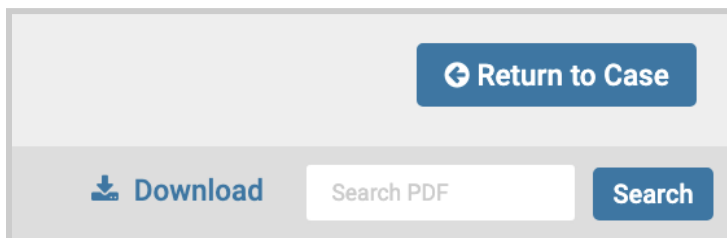
You can review the candidate's petition when the case is shared with you, in order to check that the required materials have been included. A trigger with the candidate's name will appear on your dashboard:



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 on the right to review the candidate's packet and to check that they submitted the necessary documents. Candidates for promotion to full who used the modified process (submitting scholarship and teaching documents on Google Drive) will have fewer files in Interfolio.



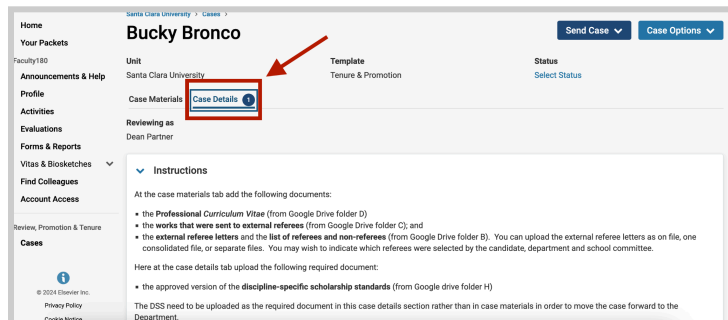
4. The left sidebar lists the sections of the candidate packet. Click on the › (caret) symbol next to any category to expand the section and to view its contents. There will be a caret and section for every activity category for which the candidate has uploaded files. Note that for those candidates going through the modified process (who elected to put their supporting materials in Google drive) the system-generated CV will be light.



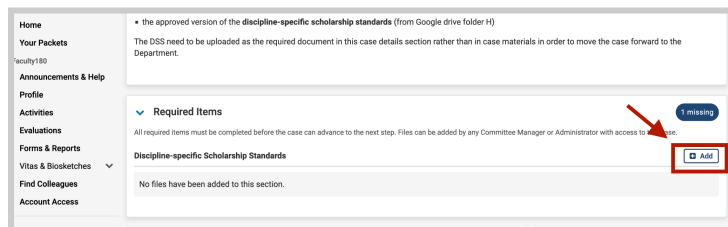
5. To exit the case materials, click the blue **Return to Case** button in the top right.

## STEP 4 - UPLOAD STANDARDS TO CASE DETAILS

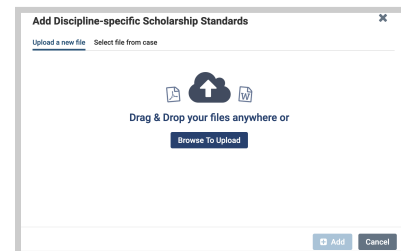
In this step, you'll upload the approved discipline-specific scholarship standards that the candidate has chosen at the Case Details tab.<sup>2</sup> This should be the first document you upload so that it appears at the top of the list of documents for subsequent reviewers.



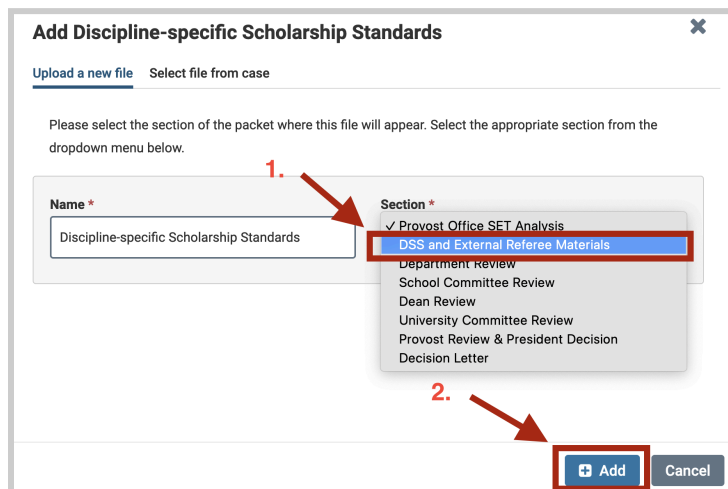
1. Go to the **Case Details** tab.



2. Click the **Add** button to upload this document. Browse your computer for the standards.



3. After uploading the standards from your computer, this screen will pop-up. In the Section field, select "DSS & External Referee Materials." Then click the blue **Add** button (bottom right) to submit.

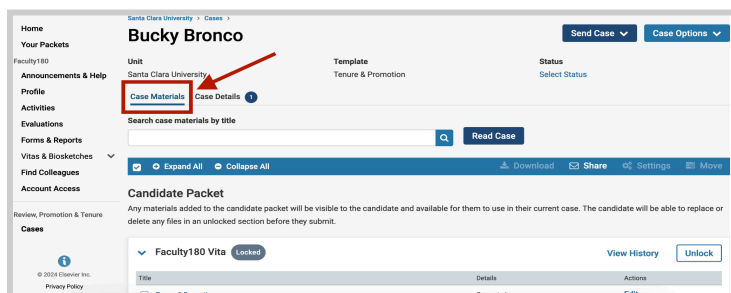


<sup>2</sup> The Provost's Office maintains a [list](#) of the current approved standards for each department online, as well as an archive of prior approved standards. Candidates may request the use of prior standards in limited circumstances that require Provost approval. Candidates indicate their choice on their external referee list. You uploaded the chosen standards to the Google Drive folder in advance of sending materials to external referees.

## STEP 5 - UPLOAD OTHER DOCUMENTS TO CASE MATERIALS

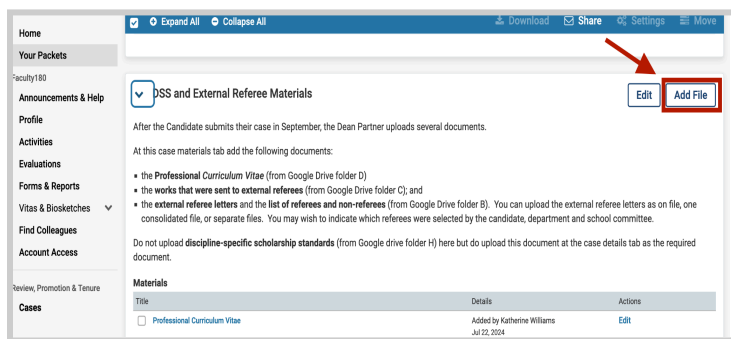
Before you can add files to Interfolio, you should download them from Google Drive so that they're available from your laptop or desktop. The documents listed below are the documents that you will move. You will upload most of the documents at the Case Materials tab of the candidate's case. You should have already uploaded one document—the discipline-specific scholarship standards—at the Case Details tab (see Step 4).

NOTE: Do not download all the supporting evidence for those candidates for full professor who chose to store their supporting evidence for scholarship and teaching on Google Drive; that supporting evidence will remain on Google Drive throughout their review.



1. Click the **Case Materials** tab and scroll down.

2. Open the internal section titled **DSS and External Referee Materials** by clicking the caret to the left. When you open it, you will see an **Add** button that you can use to add files. You will use this button repeatedly to upload materials originally stored in GDrive, that you might have renamed and reformatted (Step 1). The order you upload the documents is the order they will appear in the sidebar for subsequent reviewers, so we recommend the following order:



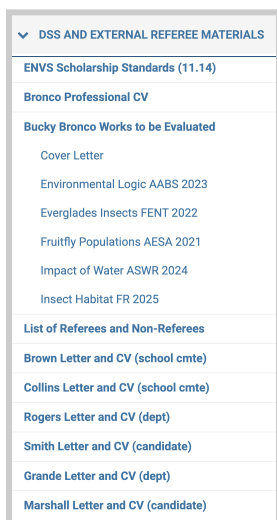
**MOU** only if there is one. This will be rare (not shown on left image)

**Professional CV** (GDrive *f* D)

**Works to be Evaluated** (GDrive *f* C), ideally as a single file with each piece bookmarked (see pp. 2-3).

**List of Referees and Non-Referees** (GDrive *f* B); and

**External referee letters and CVs** (GDrive *f* B), one document per person.



3. If there are collaborator letters collected in GDrive folder F, open the internal section titled **Collaborator Letters** by clicking the caret to the left. When you open it, you will see an **Add** button that you can use to add files. You will use this button repeatedly to upload materials originally stored in GDrive, that you might have renamed and reformatted (Step 1). The order you upload the documents is the order they will appear in the sidebar for subsequent reviewers, so we recommend the following order:

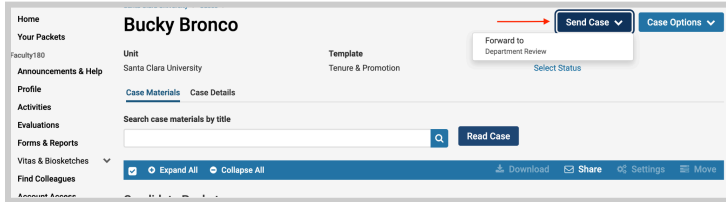
**Collaborator List** (department)

**Candidate Objection** (if any)

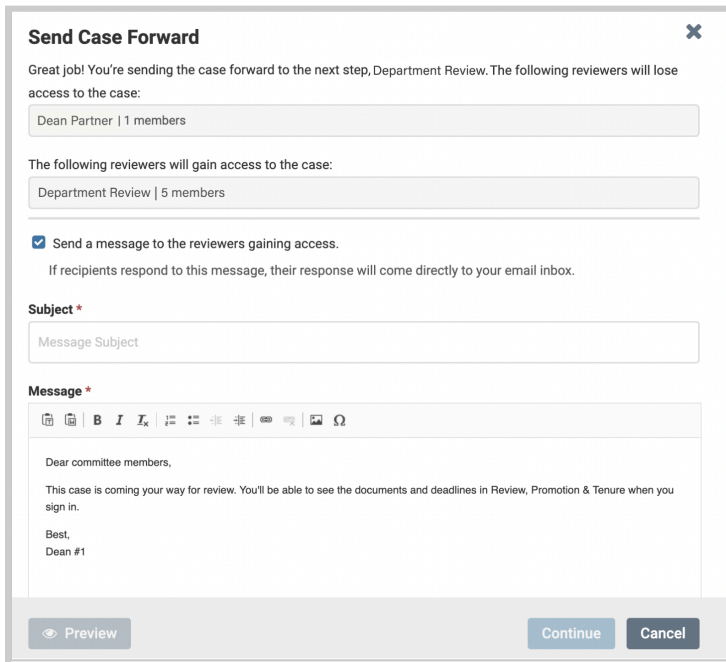
**Collaborator Letters**

## STEP 6 - SEND CASE FORWARD

After uploading the various documents to the case, you will send the case forward to the department for review:



1. To forward the case to the Department Committee click on the **Send Case** button.



2. 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.