Interfolio Faculty Search

User Guide – College Administrator & Committee Manager

Faculty Affairs | Office of the Senior Vice President and Provost

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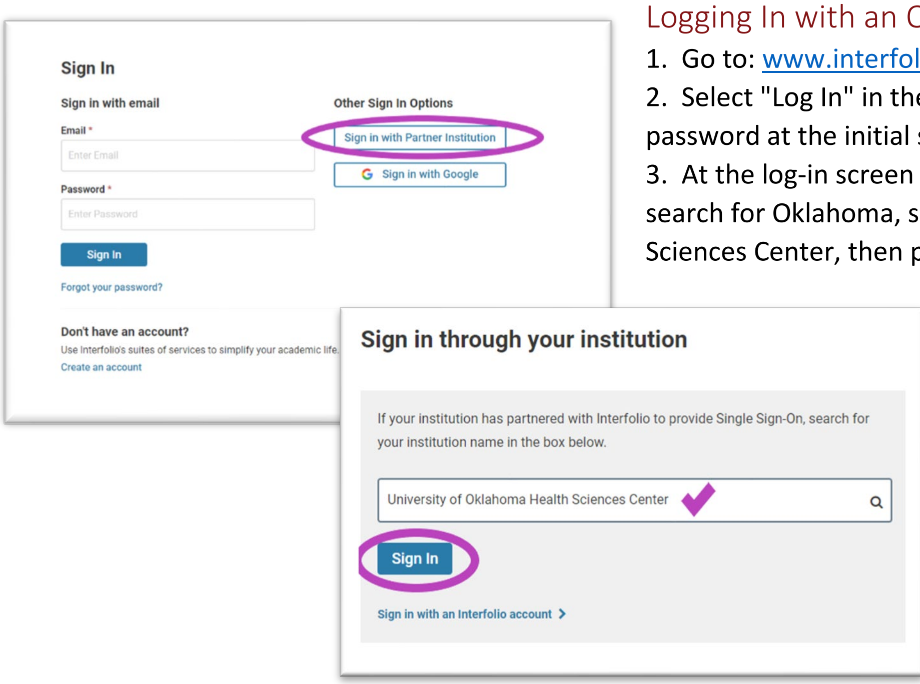
Introductions and Tips

Introductions

Faculty searches are a balancing act for institutions. Interfolio designed Faculty Search to facilitate an easier and more transparent search process for everyone from committee members to administrators, officers to the applicants themselves. This online applicant tracking and recruitment system allows you to collect, view and discuss application materials securely

This guide is intentionally minimal so users—especially first-time users—have a concise reference that covers the basics of evaluating applicants. Interfolio, however, has a wide variety of additional functionalities to support or enhance the evaluation process. Please work with your Interfolio Administrator to learn more about additional features or if you need additional assistance with functions outlined in this guide.

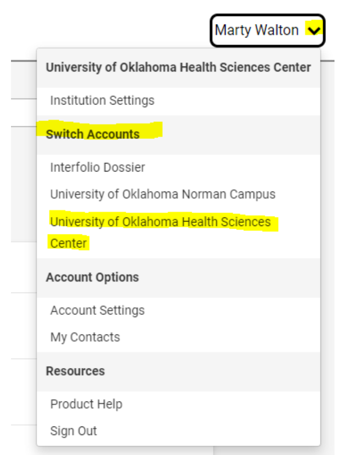
The full menu of Interfolio Faculty Search guides is available at Help for Interfolio Faculty Search. Be aware, however, that Interfolio's guides will not have OUHC-specific recruitment requirements and may not reflect institutional settings put in place for OUHC users.



Logging In with an OU.edu log in

1. Go to: www.interfolio.com
2. Select "Log In" in the upper right-hand corner. (do not enter a password at the initial screen).
3. At the log-in screen select the partnering institution button, search for Oklahoma, select University of Oklahoma Health Sciences Center, then proceed to log-in with your OU credentials.

4. Once logged in you may need to select your campus designation. The CU and RSU searches are located in the OUHC campus designation. At the top right corner of the screen select "V" next to your name. A drop down menu will appear, Under "Switch Accounts" you will select "University of Oklahoma Health Sciences Center".
5. Once you log in to OUHC's page, you should land on the Positions page. If the page header does not say 'Positions', select the Positions option from the side menu. As an Evaluator, you should see the position(s) to which you have access displayed in a table. Click on the position name to access applications.



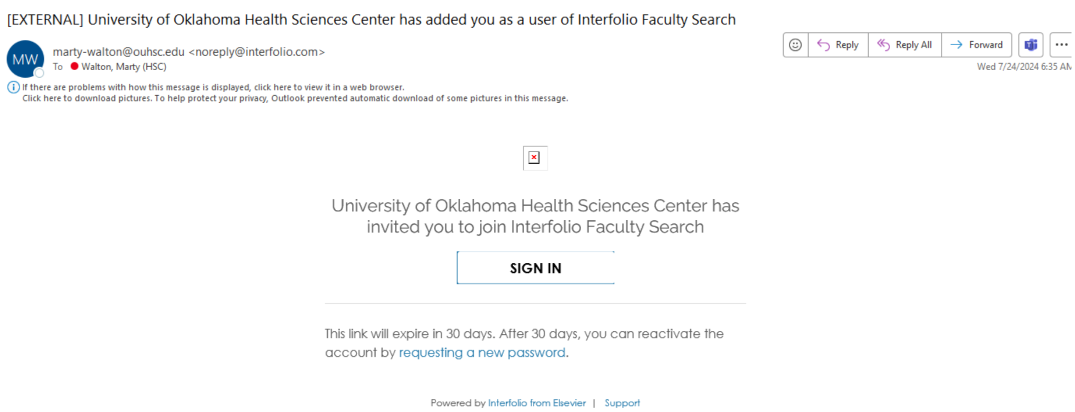
Key Concepts & Tips

Troubleshooting

The first stop for questions about Interfolio is the Interfolio help page. If you are still having trouble setting up your search or viewing applications, please contact the Provost Office Faculty Affairs.

Email Notifications

To ensure delivery of interfolio notices you can add Interfolio as a trusted email domain in your email's address book (noreply@interfolio.com) or safe sender lists. Below is an example of a notification email if you would like to build an outlook rule around them as well.



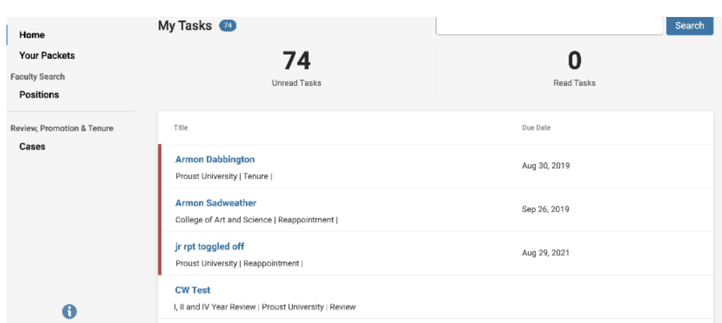
Not Receiving Interfolio Emails?

- First, check your email's spam and junk folders
- To make sure Interfolio messages are not sent to spam or junk folder, try adjusting email filters. Find the email from the list below to learn how to add Interfolio as a trusted domain.

More information managing emails can be found at https://product-help.interfolio.com/en_US/about-dossier-accounts/manage-emails-from-interfolio#not-receiving-interfolio-emails-1

Home Page

After logging in, and choosing an institutional account, users will see the Interfolio Homepage. The navigation bar options will vary depending on their permissions and Interfolio products used by the institution. The Interfolio homepage for institutions is the central place for faculty members within Interfolio, no matter what product they use. For information about the sorting order of the *My Tasks* section, check out this article about My Tasks and Sorting Order



Quick Tips

- Remember that comments made on a computerized system are on the record forever; while the administration may not read your comments, they are nonetheless a permanent record of search practices.

- It is worth reminding search committee members that they can view application materials online by selecting any relevant applicants and clicking the "read" button. This will reduce the number of sensitive documents downloaded to faculty computers.
- You are requested to regularly update applicants' statuses. These can be set so that applicants are not aware of status changes, but a log of status changes is an important part of OUHC's reporting requirements.

User Roles

When adding a new user, they can be given a user role and assigned to a specific unit. Without these choices, they will be added as an Evaluator with no assignment by default. Evaluator is the default role for search committee members. A user's role determines their access to information within Interfolio Faculty Search. The types of users in the program include Institutional Administrators, Administrators, Committee Managers, Evaluators, and EEO Officers. More information on the user roles is below and at https://product-help.interfolio.com/m/27443/l/530854-user-roles-in-interfolio-s-faculty-search

BEST PRACTICE

It is recommended that units assign an Administrator — instead of a Committee Manager — to manage the search and work with the search committee. This is typically a staff member. Some Interfolio institutions assign the Committee Manager role to the search committee chair, this is at each department's discretion since the role has the ability to edit the search (accidentally or intentionally) which could result in serious complications to application data and workflow.

To avoid this risk, search committee members could be assigned the Evaluator role and a search committee representative would communicate with the Administrator to make sure that statuses and applicant communication are administered as intended.

Administrator – Every hiring unit must have at least one assigned Administrator and can have more than one. Administrators are typically staff who are well-versed in coordinating academic personnel recruitment.

Administrators can create, supervise, manage, monitor, and close searches at the college level or in any department within that Unit

Committee Manager – Assigned by Administrators to coordinate a particular search; can edit settings and statuses, view reports, communicate with applicants. This is an optional role. Please review the BEST PRACTICE box to the left.

Evaluators – Assigned by Administrator; appropriate role for members of the search committee charged with viewing, reviewing, and rating applications; cannot create/edit positions.

User Management

To extend Evaluator access to personnel who will serve on your search committee, those individuals must be added to the Interfolio system. Additional details of adding them to the search committee can be found below but users must be assigned in the system prior to being added to the search committee. The easiest way to accomplish this is sending the Provost's office a list of new members to be added (list must include first name, last name, email address, and if any special roles need to be assigned other than evaluator.) Additionally, if you would like to use a custom welcome message please include that request.

If you are adding new users to the system yourself the interfolio guide is linked below.

Interfolio Step by Step Guide - Add New Users and Assign Roles in Faculty Search

Creating and Managing a Position

Creating a Position

Units creating academic positions in Interfolio Faculty Search need to assign a Position Type which dictates the review process for a given job advertisement.

There are 3 unique Position Types – The Position Type will depend on the unit type (departmentalized), academic title/rank associated with the position, whether the position is on the hiring plan, and whether the draft advertisement requires review by the Institutional Equity Office (IEO). To determine which Position Type should be assigned, please review your FAAB position guide.

Note: Once a Position Type is set, it cannot be edited. If any approvers determine the Position Type needs to be corrected, the Interfolio FS position creation process needs to be restarted from the beginning.

Regardless of the assigned Position Type, units are responsible for reviewing the position description, qualifications, and internal notes to ensure accuracy and compliance with University policy.

Building the Job Posting

The following text fields combine to serve as the position announcement and are visible to applicants. Advertisements posted in journals, listservs, and other recruitment outlets should mirror the language entered here. The Administrator should confirm the content of these sections aligns with the search committee and/or unit leadership expectations of the position and the Search.

Position Description

Provide general information about the position. In this section, you will provide basic information related to the position/search

<u>Position Title</u>

To create continuity that supports reporting and a user-friendly applicant interface, position titles should contain the tenure type and the faculty title, all spelled out (e.g., Tenure –Track: Assistant Professor). Avoid using abbreviations because it helps applicants navigate the Job Board.

Location

Enter the city/campus of the position location.

Position Type

This field is auto populated from the selection you made on the previous screen.

Open Date

This is the date the position is created in Interfolio. The position will go live (post) after it has been reviewed and approved through the approval chain. A future date may be entered, however, the position will post AFTER all signed approvals are received. The approval process is impacted by the volume of searches, approval questions, and other requests.

Deadline (Position Close Date)

Specific Date: Last day for accepting applications.

To continue receiving applications beyond the initial application deadline, edit the "Specific Date" field to a later date. Extending the "Position Closes" date after the search has been approved will not require another round of approvals.

Rolling Deadline: If you would like to keep accepting applications until a hire has been identified, choose "Rolling Deadline." Rolling Deadline:

Qualifications

Should be broken out into Required and preferred (not required qualifications)

Application Instructions

- All applications materials should be submitted through or uploaded to Interfolio.
- Be clear about what materials are required and the preferred/required format of those materials.
- Later in the Create a Position process, you will need to tell the system what documents to prompt applicants to submit.
- This section is also where you should articulate the initial review deadline if you have one (e.g., "Complete applications received by (DATE), will be given preferred consideration" or "Initial deadline for receipt of complete applications is (DATE)").
- Should also include the contact person for if applicants have questions

Required Documents

Here you can list the documents your applicants must submit with their application. You can set the document type such as C.V., or Peer Evaluations, and set the number of documents necessary to fulfill the requirement. For instance, you might require one C.V. and three peer evaluations. Your applicant can upload these documents and submit them electronically when applying for a Faculty Search position. The applicant will need to upload the exact number of each document type that you set in order to fulfill the requirement. When a requirement is filled, the check mark will turn green.

Creating and Managing a Search Committee

Setting Evaluation Criteria

Only those with Administrator or Committee Manager roles will have the ability to set up evaluation criteria for a given search, but they should do so only after consulting with the search committee, search committee chair, or unit leadership as applicable. Applicants will not be able to see the evaluation criteria. You may skip this step if your search committee has not yet established its criteria, but criteria must be entered before the search committee begins reviewing applications. You can establish custom evaluation criteria for rating applicants on a 5-star scale. This allows Evaluators to rate and compare applicants on criteria such as scholarship, teaching, research, publishing, or whatever criteria you add. The system will calculate the average score of an applicant by both category and overall rating. You can set whether or not Evaluators can view comments and ratings given by other users.

The criteria should include all required (minimum) and desired/preferred qualifications listed in the ad. Criteria may also be built around job duties or expectations of the position. Candidates who do not meet the required (minimum) qualifications may not be hired into the position

Blind Review

Units have the option of setting the search for 'blind review' which means an Evaluator will only be able to see ratings he/she assigns and not ratings assigned by other Evaluators. The search committee should consult with unit leadership and then communicate to the search Administrator whether blind review will be used. The search Administrator can adjust the Faculty Search setting accordingly.

Setting up the Search Committee

To extend Evaluator access to personnel who will serve on your search committee, those individuals must be added to the Search in the system. Click "Add Member" to view OUHC personnel already loaded in as users. You can search by name, unit, or email, or use the search field to enter a keyword. Once you locate the person you are looking for, click "Add." If you need to add a user outside the OUHC or OU domains, please email Provost Faculty Affairs with the request. A search committee must be made up of more than one person.

Add a search committee Manager

- Click "Add" to add the user as manager for the committee
- This list displays users who have been assigned the role of Committee Manager for the unit in which you are creating the position.
- Please note that a committee manager is not required.

Add a search committee Member

- Select add member
- The "skip step" is an option to allow you to fill out additional sections prior to entering the search committee names
- To remove a search committee member, simply click the X.
- Otherwise, click "Save & Continue."
- Keep adding members and/or managers until you have your committee assembled, and click "Save & Continue."

Managing Applications

Manually Adding Applicants

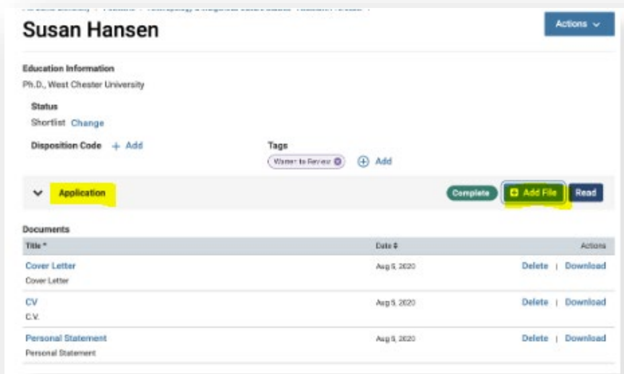
Administrators and Committee Managers can add an applicant on their behalf to the applicant list. - NOTE: this just puts their name on the list.

From the Position Actions drop down menu, upper right, select Add New Applicant. Fill in the three field with valid information - do not use your own email address.

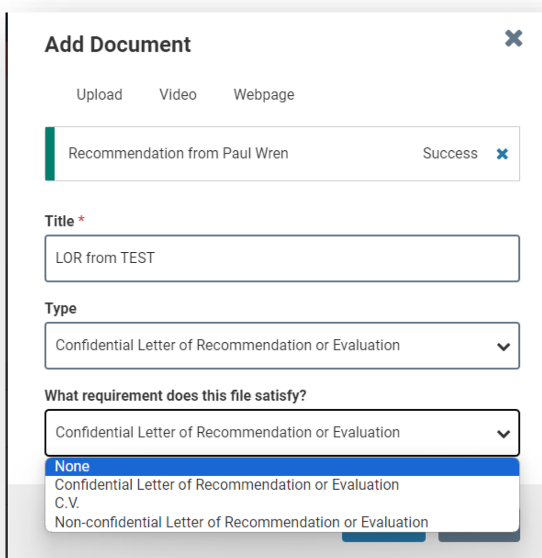
Manually Adding Applicant Documents

Administrators and Committee Managers can add application documents on behalf of an applicant. –

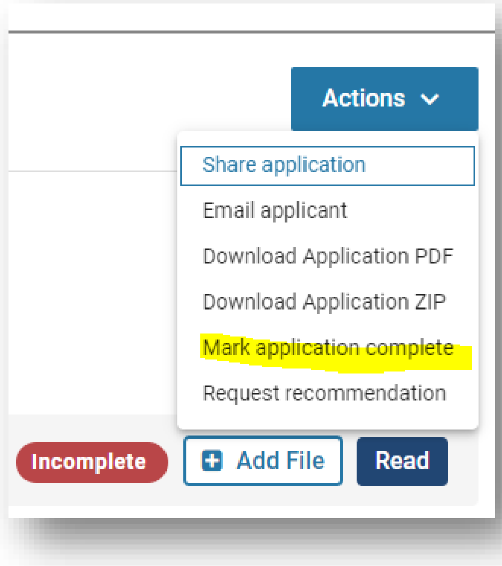
From the applicant list, select the desired applicant name link to open the applicant profile page. Click add file button in the application line



To add documents. Click “Browse To Upload” or drag and drop. You will then be able to indicate whether or not this fulfills a requirement. Click “Add” when finished



Select **Mark Application Complete** from the *Position Actions* dropdown.



Interfolio Step by Step Guide - [Create an Application, Add Materials, or Request a Letter on Behalf of an Applicant]

Accessing Applications

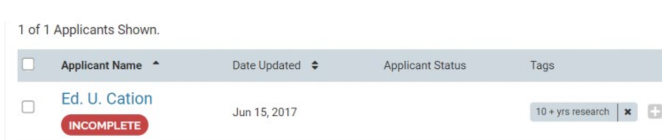
When you click on a position, you will see a list of applicants to that position. To start reviewing, check the box next to the applicant name. If you check boxes for multiple names or select all applicants by checking the box next to "Applicant Name" at the top of the table, you will be able to review applicants in succession without having to return to the list.

Tagging Applicants

There are many reasons why a unit might want to tag an applicant(s). Units who have large applicant pools or who want to leverage areas of expertise within their search committee will often use tags to assign applicants to a particular search committee member for the initial review. Tags can also be used to identify particular characteristics of an applicant or applicants (e.g., research focus) which can then help Administrators or Evaluators sort and/or assign them more easily. Administrators or Search Committee Members can assign tags.

To assign a tag, check the box next to one or more applicants and click the Tag button in the toolbar. Select the tag you want to apply, or select 'Add new tag' to create a new one.

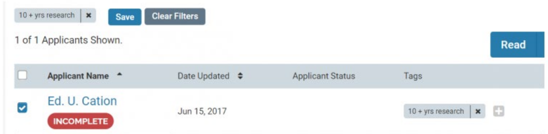
The tag will appear on the same row as the applicant's name. Once tags are applied, you can filter the applicant list by tag by clicking the Filter button near the keyword search bar. For more information on tags, visit Use Tags to Mark and Sort Applications.



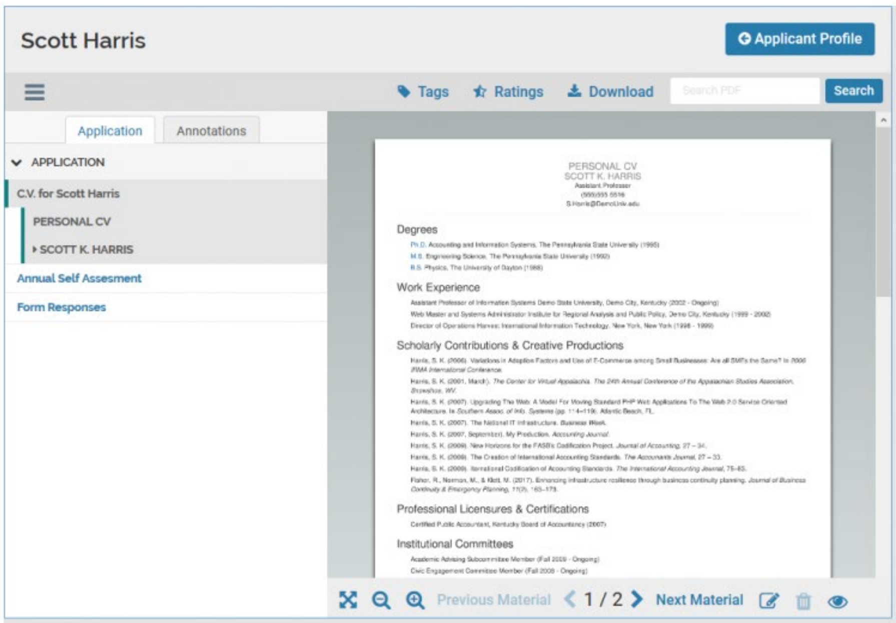
Interfolio Step by Step Guide - [Use Tags to Mark and Sort Applications].

Finding Applicant Materials

After checking a box or boxes of applicants you'd like to review, click the "Read" button located in the blue toolbar.



You will be taken to the Materials Viewer window where a list of application materials will display on the left. Click on each item to view. Click on the arrows at the bottom of the Materials Viewer to advance to the next document.



Although interfolio allows you to download applicant materials, units assume risk in doing so. Confidentiality is an important aspect of all academic personnel recruitment. Lack of sensitivity to personal or professional information can be very damaging to an applicant's career, especially when that applicant seeks to leave their current institution for another position. The search committee is expected to be defenders of applicant privacy and – by extension – stewards of the reputation and integrity of the Institution.

Only those with an absolute and legitimate need (administrative, evaluative, or decision-making roles) should have access to applicant materials. If interviewee/finalist materials need to be circulated to a larger group, precautions should be taken to limit, control, and remove access in a responsible and timely manner. Anyone with access should be informed of the expectation that they not share application materials with others.

Units are encouraged to reflect on different ways they can support confidentiality in the recruitment process.

Interfolio Step by Step Guide - Download Application Materials

Emailing Applicant(s)

Unit administrators as well as committee managers can easily email applicants individually or email a group of applicants by using the email function available from the red menu bar.

Select and click on the title of the search position to open it to the applicants list page.

Email one applicant:

- Click on the person's name from the list of applicants. This will open their application; in the upper left, their name will be shown.
- Use the Actions drop down menu, upper right corner, and select Email applicant.

- An Email Applicants window will pop up.
- Skip the Select a Message Template
- Go to the Subject field and enter the text of subject line
- Enter your message in the Body section.
- You have the option to Preview or just Send at the bottom right of the window.

Email more than one applicant:

BE SURE the whole list of all the applicants are showing on one page by Selecting All in the lower left on the applicants list - (If you have already Archived those applicants that did not make the cut, use your filter first to select Yes under Archived: then scroll to the bottom of that Applicant list page and on the left, click the arrow to select All.)

- Check the box on the left, next to Applicant Name, column title. This will select all names in the list of applicants.
- BE SURE to deselect (un-check the box next to the person's name) if that individual is not to receive an email. This where the applicant status is usuful to help identify.
- Select the Email button from the red menu bar that appeared.
- An Email Applicants window will pop up. Note - all the names of all applicants to receive this email will be listed- check this list to be sure you have all the correct names. No applicant will see the email addres nor the names of the other applicants; Message only goes to the individual.
- You have an option to change the reply email address if you like.
- Skip the Select a Message Template. – most uses a message relevant to the current search and not a template message.
- Go to the Subject field and enter text there- i.e. Yale – title of the search
- Enter your message in the Body section. Note, you have the option to insert placeholder (similar to a variable) for: applicantName, positionName or unitName.
- Click Preview or just Send (bottom right of the window) when ready.

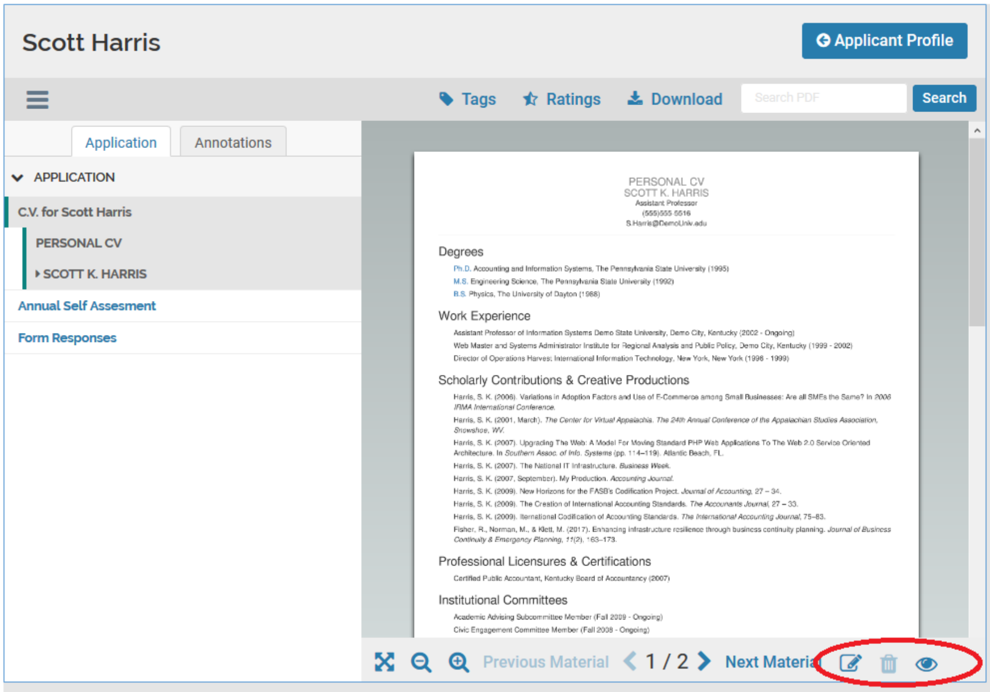
As a reminder, a good way to verify the count of recipients matches your list, you can view log files of messages sent ; be sure to click on Download (CSV); open file in Excel for a quick view and count.

NOTE: this is not an email client, functionality is not similar to using sent messages via an email client such as MS Outlook.

Interfolio Step by Step Guide - Emailing Applicants

Read and Evaluate Applications Using the Document Reader

Faculty Search (FS) users can read and annotate application materials using the built-in reader. Materials from multiple applicants can be loaded into the viewer, allowing users to scroll through and evaluate applications without leaving the browser window. Users can also make annotations on application materials, download the annotations they make, and if enabled, can leave comments, add labels, and rate applicants from the reader. The instructions below are for accessing the reader from the Applications page of a position. Accessing the reader from here allows Evaluators to load multiple applications into the reader at once. Note that Evaluators can also access the reader from the profile page of an individual applicant and read one application at a time.



Interfolio Step by Step Guide - [Read and Evaluate Applications Using the Document Reader]

Annotations

Annotations are private, personal notes about an application, and are only viewable by the committee member who added the note. Please be aware that there may be rare circumstances, such as a lawsuit, where annotations may be "discoverable." The annotation toolbar is located in the bottom right corner of the Materials Viewer.

Clicking the first icon above will display the different options for locating and applying notes. The second icon will remove a note. The 'eye' icon will display all annotations you've applied to the page. You can view a list of annotations by clicking the Annotations tab at the top of the materials list on the left hand side of the window.

You can export all your annotations by clicking the export icon that appears to the right of the Annotations tab once you've made an annotation

Interfolio Step by Step Guide - [Make Notes on Materials and Export Annotations]

Assign Statuses and Dispositions

Utilizing statuses and dispositions is a good way to manage your applicants but is not always required. Statuses identify when an applicant fall out of consideration and disposition codes identify why.

Only Administrators and Committee Managers can assign statuses. At various points during a search, the Administrator will need to assign and revise statuses to accurately reflect what is happening in the search. Administrators should not assign statuses or disposition codes without first consulting with the search committee or search committee chair.

Position Status

Position statuses are high level phases of the search. They include:

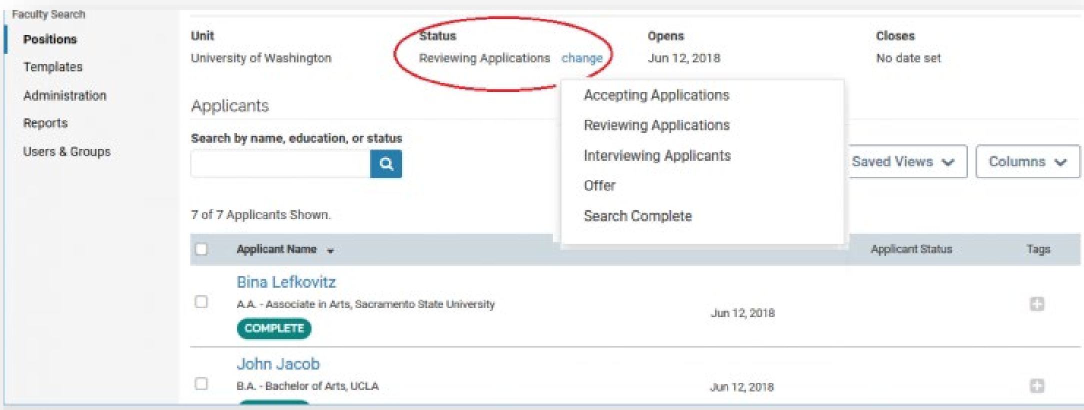
- Accepting Applications
- Reviewing Applications
- Interviewing Applicants
- Offer Stage
- Search Complete

After a position has gone through the approval routing and been approved, the Administrator will need to change the Position Status to Accepting Applications in order for applicants to be able to apply to the search. Similarly, the Administrator will need to change the Position Status from Accepting Applications to Reviewing Applications before Evaluators can access complete applications.

The appropriate time to change from Accepting Applications to Reviewing Applications is when:

1. Initial evaluation criteria have been entered into the position
2. You have reached the priority/initial application deadline (if applicable), and
3. The search committee is ready to review applications

To change the position status, click the change option in the Status section at the top of the applicant list window and select option that best represents the status of your search.



Application Status

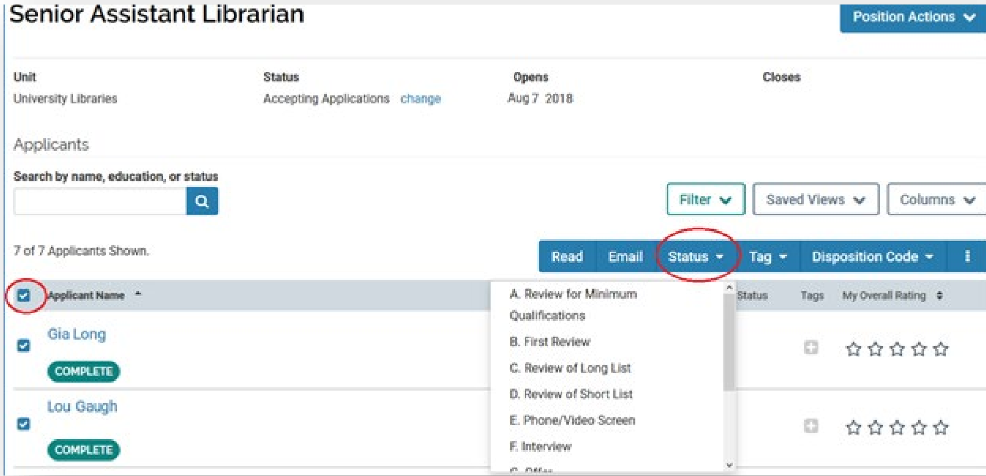
Application statuses are specific phases of the review process itself. In essence, they are sub-phases within a general Position Status. For example, the broad phase of Reviewing Applicants might take several rounds with the applicant pool getting smaller and smaller with each review. In FS, those unique rounds of review are called Application Statuses. Application Statuses include:

Review for Minimum Qualifications

- First Review
- Review of Long List
- Review of Short List
- Phone/Video Screen
- Interview
- Offer
- Closed with Hire
- Closed without Hire

Setting the Application Status helps units organize their search and disposition the applicant pool more efficiently. How and when Application Statuses are applied is at the discretion of the unit. Some might not use all the statuses or they might choose to use them in a different chronological order.

To change the Application Status, select all the applicants who are still under consideration by clicking the check box next to the Applicant Name header and then click the Status button in the blue tool bar at the top right of the the applicant list. From the drop down menu, select the applicant status option that best represents the phase of review the applicants are moving into.

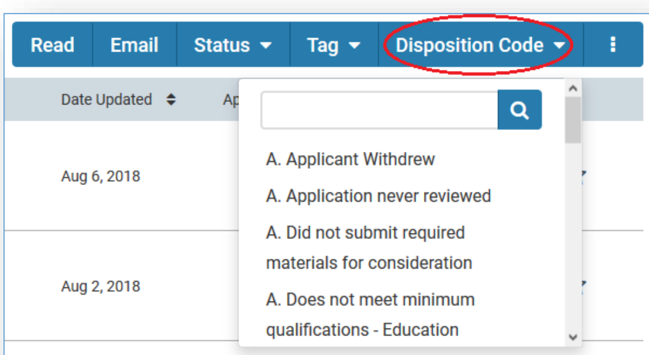


The appropriate time to change Application Statuses is when you have completed a distinct phase of the review process (e.g., Review for Minimum Qualifications), you have dispositioned and archived applicants who won't be moving on (discussed below), and you are ready to move to the next phase of review. Do not change the position or application status without first applying disposition codes and archiving applicants who won't be moving on.

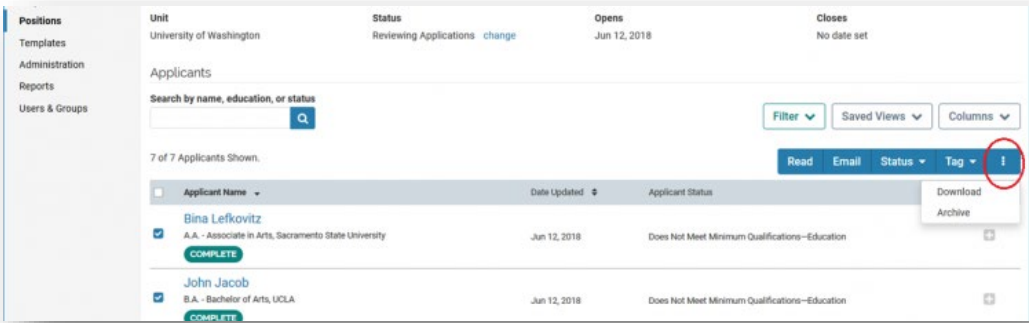
Disposition Codes

Disposition codes identify why an applicant falls out of consideration (i.e., reason for rejection). As previously noted, these codes are helpful for auditing and reporting purposes. The disposition codes are set at the provost level, but are applied at the hiring unit level; this means they can't be deleted or redefined, but the unit determines to whom they are applied. Administrators should not assign disposition codes without first consulting with the search committee or search committee chair. If new disposition codes need to be added, please email HSC Provost Office Faculty Affairs.

To assign a disposition code to an applicant, go to the applicant list and check the box next to the applicant name(s). Click the Disposition Code button from the blue tool bar at the top right side of the applicant list. Select the disposition code the search committee has determined best represents the reason the applicant is falling out of consideration. If you selected multiple applicants, the disposition code will be applied to the batch. Repeat this process for all applicants falling out at the current stage of review (i.e., position-application status).



Once you have completed assigning disposition codes for the current stage of the review process, click the additional options button (far right button in the blue tool bar) and select Archive.



Applicants who are archived will no longer appear on the applicant list. This makes the review process easier and more manageable for both the Evaluators and the Administrator. To view archived applicants or to unarchive an applicant, review the Interfolio guide at Archive or Unarchive an Application.

Once you have dispositioned and archived applicants, you can move forward with changing the Application Status as described in the previous section. Remember that all applicants must eventually be assigned a disposition code. The Office of Academic Personnel will not approve the hire of your preferred candidate until all applicants are dispositioned.

Note the Not Top Ranked Interviewee disposition code should be used for interviewees who are not the top choice, but whom the unit wants to keep in play until the preferred candidate accepts or declines an offer. This is a placeholder status and should be changed to another disposition code before closing the search. That will require going into the applicant archive and changing the disposition code to another disposition code or unarchiving the applicant to move them forward to the offer stage.

Interfolio Step by Step Guide - Create and Manage Position and Application Statuses

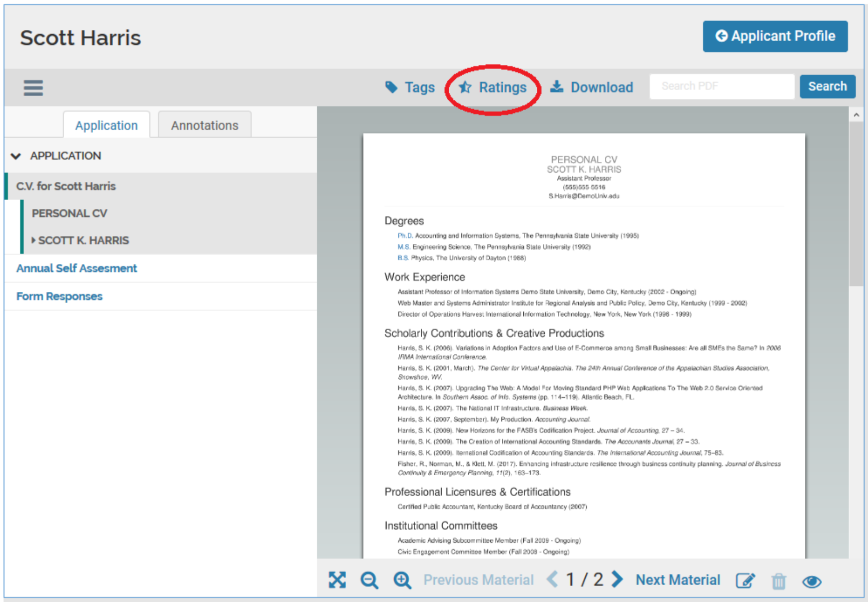
Interfolio Step by Step Guide - Use Disposition Codes

Interfolio Step by Step Guide - Archive or Unarchive an Application

Rating Applicants

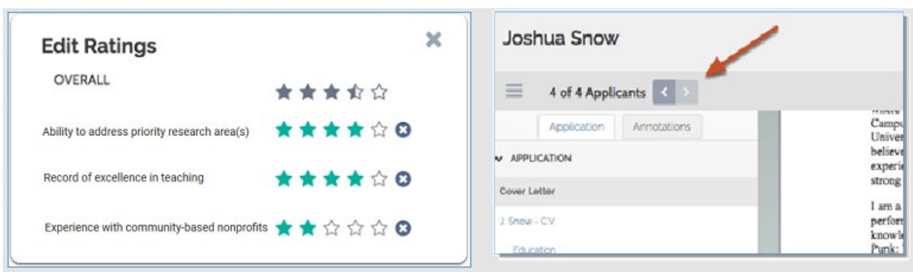
It is important to have defined criteria by which the committee will evaluate applicants. These criteria are referred to as the *rubric* or an *assessment rubric.* With the criteria in place, Evaluators will be able to review applications and assign a rating to each criterion. Applicants are never able to see evaluation criteria or ratings.

After reviewing applicant materials, Evaluators can leverage the rating feature in FS to evaluate applicants against the evaluation criteria that were entered into FS prior to committee review. The rating feature allows the evaluator to assign one to five stars for each criterion. To use the FS ratings feature, click “Ratings” on the toolbar at the top of the window.



A pop-up window will open listing all criteria. Click on the highest number of stars you want to award for each criterion (i.e., click the fourth star to assign four stars). When you are finished rating the applicant, close the pop-up window.

When you are finished rating the applicant, use the arrows at the top of the viewer to advance to the next applicant.



Interfolio Step by Step Guide - [Rate Applicants]

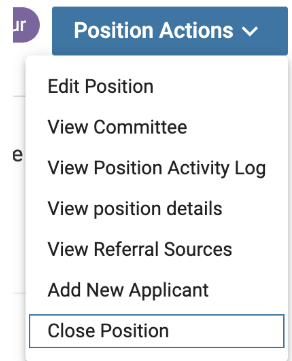
Closing a Position & Candidate Selection Approval

When a search is complete, the position must be formally closed. OUHC utilizes the **Selection Approval Workflow** for our institution, so you must submit the selected candidate(s) through this workflow to ensure compliance with hiring policies.

Initiate the Closing Process

Navigate to the position you wish to close within the **Positions** list.

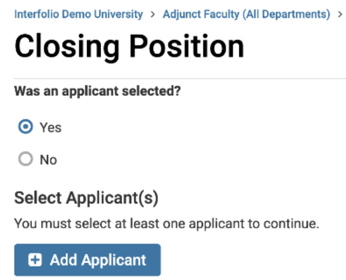
1. Locate the **Status** button (usually found near the top right of the position dashboard).
2. Select **Close Position** from the dropdown menu.



Select the Applicant(s)

Once the "Close Position" window appears, you must indicate which applicant (or applicants) have been selected for hire.

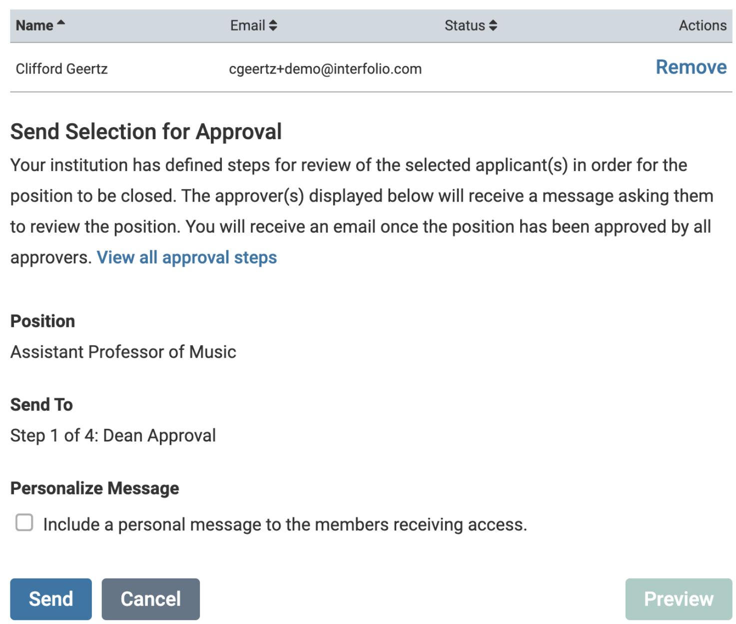
1. In the **Select Applicant** field, search for or select the name of the candidate(s) being hired.
2. **Verify** that the correct candidate name is attached to the closing record.



Note: If no applicant was selected (e.g., a failed search), you can typically skip the selection step or mark "No Selection Made," depending on your institution's configuration.

Review the Approval Workflow

After adding the applicant, Interfolio will display the **Selection Approval** steps required by your institution.



- **Review Approvers:** The system will automatically display who needs to approve this selection (e.g., Dean, Provost, IEO).
- **View Steps:** You can click **View all approval steps** to see the full chain of command for this hire.

Finalize and Submit

Before submitting, you have the option to communicate with the approvers.

1. **Personal Message (Optional):** If you need to add context (e.g., "This is the candidate approved by the committee on [Date]"), click **Include a personal message**.
2. **Preview:** Click **Preview** to see exactly what the email notification to the approvers will look like.
3. **Submit:** When ready, click the **Send** button.

The position is now closed, and the selected applicant has been routed to the first person in the approval workflow.

Next Steps

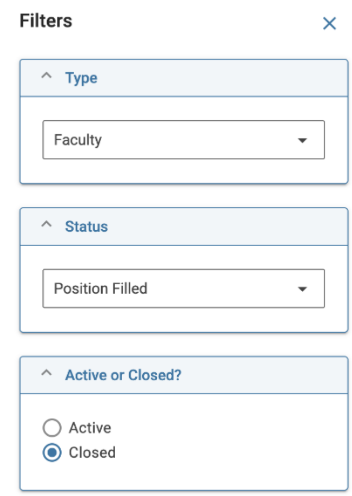
- Monitor the status of the approval on the Position Dashboard.
- Once fully approved, you may proceed with the official offer letter process (outside of this workflow).

Interfolio Step by Step Guide - [Close a Position and Select Applicant(s)]

Reopening a Closed Position

In Interfolio Faculty Search, a position is either **Open** (active) or **Closed** (no longer accepting applications/processing). If a search needs to be reactivated—for example, if a selected candidate declines an offer or the search was closed in error—you can reopen it using the steps below.

Locate the Closed Position



By default, your dashboard may only show active positions. You need to filter the list to find the closed one.

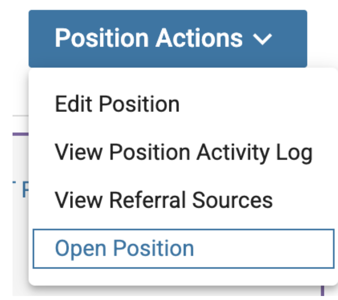
1. Navigate to the **Positions** page.
2. Click the **Filter** button (usually located near the search bar).
3. In the status dropdown, select **Closed** to view only the closed positions.
4. Click the **"X"** to close the filter menu and view the results.

Select the Position

From the filtered list, locate the specific search you wish to reactivate.

1. Click the hyperlinked **Name** of the desired position.

Change Status to Open



Once you are inside the position dashboard:

1. Locate the **Position Actions** button in the upper right-hand corner.
2. Select **Open Position** from the dropdown menu.
3. A prompt will appear asking you to **select a new status** for the re-opened position (e.g., "Accepting Applications" or "Reviewing Applications"). Select the appropriate status.

Update Dates & Deadlines

Important: Simply changing the status to "Open" does not automatically allow new applicants if the original deadline has passed.

1. If you intend to accept *new* applications, click **Edit Position**.
2. Update the **Close Date** or **Application Deadline** to a future date.
3. Review the description to ensure it is still accurate.

Note: If you do not update the dates, the position will be "Open" internally for committee review, but potential applicants may still be blocked from applying.

Interfolio Step by Step Guide – Repoen a Position

Interfolio Step by Step Guide – Edit a Position (Create/Manage)

Interfolio Step by Step Guide – Assign or Change a Position Status

FAQs

How do I know what roles to assign members of my department?

All staff should be assigned a "committee manager" role. Faculty should be assigned either an "evaluator" role or a "committee manager role." The committee manager will have a more complicated interface and some abilities irrelevant to faculty members but will also be able to send bulk messages and run reports, which some faculty members may wish to do. If you would like to control permissions so that the search committee chair has additional access to comments and evaluations, use the "set evaluators" section of the setup page.

I need to add someone as a committee manager, but their name does not appear as an option in the list of names. How do I add them?

1. *Make sure that person has been added to the program as a user. Click Users & Groups in the navigation bar. Search the list by first or last name.*
2. *If that person is listed, make sure they have been assigned the Committee Manager role for the same unit that you used to create your position.*
3. *If you've already added this person to your committee as an Evaluator, you need to remove them first, then you'll be able to add them as a manager.*
4. *Click the + Add Manager button. A window will appear with a blue question mark (?) icon at the top. Please click that icon for additional information.*

My evaluators say they are unable to view the applicants and their materials. Why can't they see this list?

If Evaluators can't see the applications for a position, check to make sure:

1. *They have been added to the search committee*
2. *The position status allows Evaluators to review applications*
3. *The position or application has not been archived*

I am running a search with committee members from a different department, how do I add them as evaluators?

You should be able to add any OUHC or OU faculty members to your search committee as evaluators, regardless of their home department. If you are needed to add a community member please email OUHC Provost's office faculty affairs\.

When you choose your required documents, do not make letters of reference required. Instead, ask candidates to use the "additional documents" fields to upload their confidential letters or their list of referees as appropriate.

You can also make three letters required, then manually change all senior candidates' files to "completed" once they have provided everything except letters of recommendation.

How do you request a letter of recommendation on behalf of an applicant?

If you choose to request the letter of recommendation for an applicant, you can do so within Interfolio by following their online instructions. For specific guidance on how letters should be submitted, see the Interfolio instructions on the help page for letter writers.

Is there a simple way to automatically populate the recommender's information when requested letters of recommendation?

Yes! Please see the detailed instructions in Interfolio's user guide.

I want to send an email to multiple applicants at once. Can I do that?

Yes, if you are a Committee Manager or Administrator in Interfolio Faculty Search. Here's how:

1. *Check the box next to at least one applicant. A blue Email button will appear at the top of the list of applicants.*
2. *A window will appear with a blue question mark (?) icon at the top.*
3. *Please click on that icon and view our email walkthrough tutorial which will tell you everything you need to know.*

Where can I see a record of all the emails I have sent to my applicants?

Users who have the role of Administrator or Committee Manager in Interfolio Faculty Search can view a record of emails sent through the system. If you have one of those roles and want to view a record of emails:

1. *Go to Reports in the navigation bar on the left side of your screen.*
2. *Select the Logs tab at the top of the screen.*
3. *Click the System Logs button and select Messages Sent from the dropdown.*
4. *Search or type the ID number of the position you are looking for, and click View Report. You can click Download (CSV) for a spreadsheet that you can edit.*

I cannot find my position, and it is not on my position list anymore. Did I delete it?

No, it's impossible to delete a position if applicants have applied to it. You've probably accidentally archived your position. Here's what to do:

1. *Click on Positions in the navigation bar on the left side of your screen.*
2. *Click the Filter button near the top of the screen. Change the Active or Closed dropdown to "Closed" or "All."*
3. *Select the position that you're working on, and click the Position Actions button.*
4. *Click Open Position at the bottom of the dropdown; the position will appear on your main position list.*

Glossary

Faculty Search: An Interfolio module also known as Faculty Search (FS) or Search is used to facilitate faculty, fellowship, academic staff, and other search processes.

Units: Units are tiers within the campus hierarchy that defines the area of the organization responsible for the search. For example the specific schools, departments, or divisions. Each unit includes Administrators, Committee Managers and Committee Members.

Approval Templates: Approval templates can be assigned to a Position.

Landing Page: Each Search will have an advertisement page hosting the position description with a unique URL that will serve as the on-line application for the open position.

Application: The collection of materials a candidate submits for review

Committees: Groups of Interfolio users with permissions to review and assess applicant materials

Dossier: Stores and manages all position and promotion documents in one place. Letters of recommendation remain confidential and the committee controls their destination within Interfolio.

Positions and Searches: A Faculty Search process for academic, staff, fellowship, or other positions collects application materials for evaluation by a committee Within the Interfolio platform, a search is a specific place to collect, store, view, and review applicant materials.