

Interfolio Faculty Search

User Guide -

Department Chair, Center
Directors, and Dean
Approver Users

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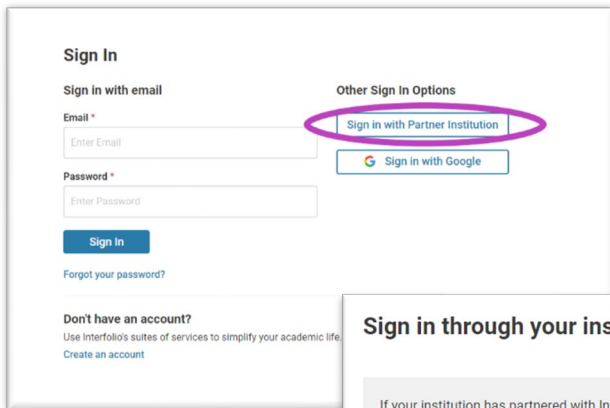
Introductions and Tips

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

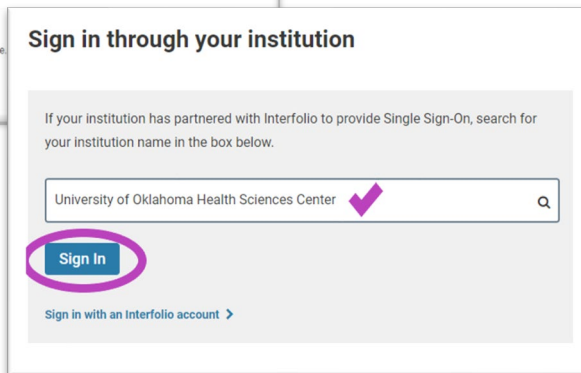
This guide is intentionally minimal so users—especially first-time users—have a concise reference that covers the basics of evaluating applicants. Interfolio, however, has a wide variety of additional functionalities to support or enhance the evaluation process. Please work with your Interfolio Administrator 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.

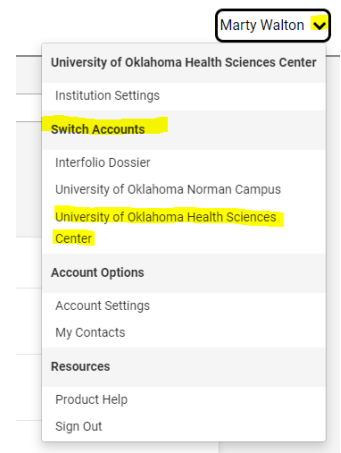


Logging In with an OU.edu log in

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

Guide for College Deans, Center Directors, and Department Chairs

This guide is specifically tailored for Deans, Center Directors, and Department Chairs. It focuses exclusively on the approving roles within the system, detailing the steps required to approve a position posting and approve a final candidate selection.

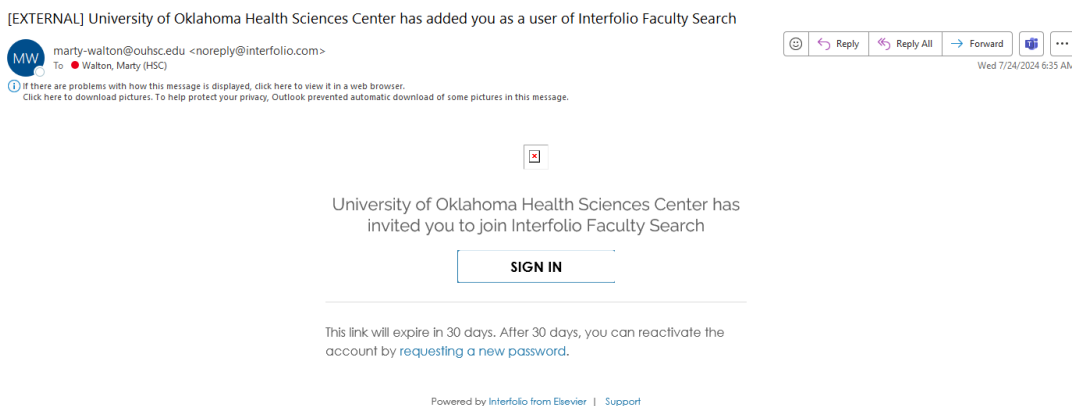
For comprehensive instructions on other system functions, please consult the Full User Guide on the Provost's website or the help links provided at the end of this document. For further assistance, please reach out to your College Faculty Affairs Liaison or contact Marty Walton, Interfolio Administrator, in the Provost's Office.

Troubleshooting

The first step 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.



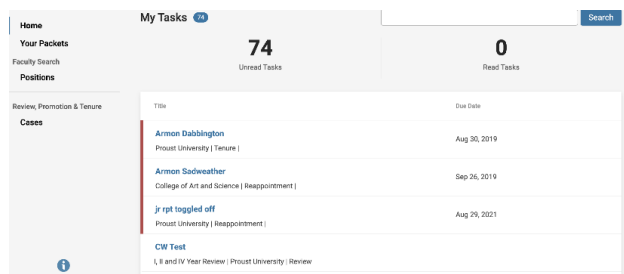
Not Receiving Interfolio Emails?

- 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

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.

Reviewing a Position Posting

When a new faculty search is proposed, it must go through an approval workflow before it is published. As an approver, you will review the position description, requirements, and search committee structure.

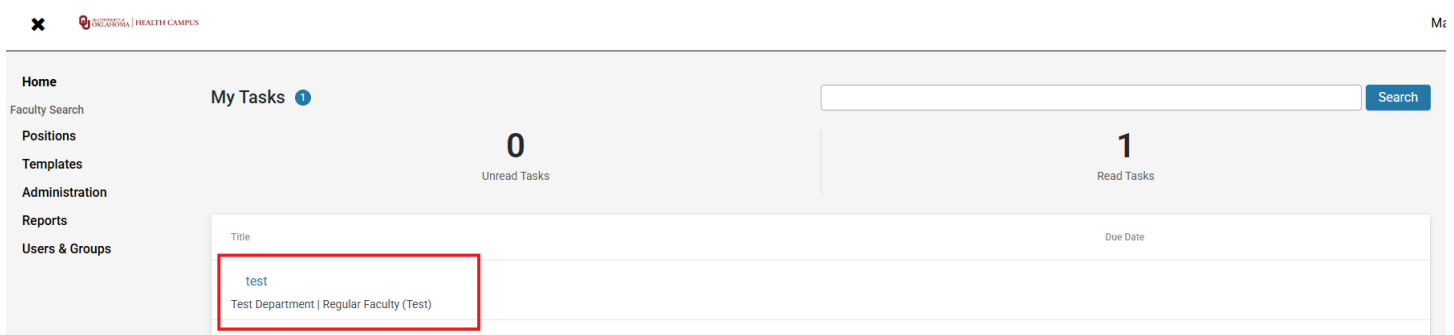
Accessing the Request

You will receive an email notification from Interfolio indicating that a position requires your review.

Option A: Click the link provided in the email.

Option B: Log in to Interfolio and view your **Home Dashboard**.

Under the **"Your Action Needed"** section on the dashboard, locate the position title and click the **Name of the Position** to open it.



Reviewing the Position Details

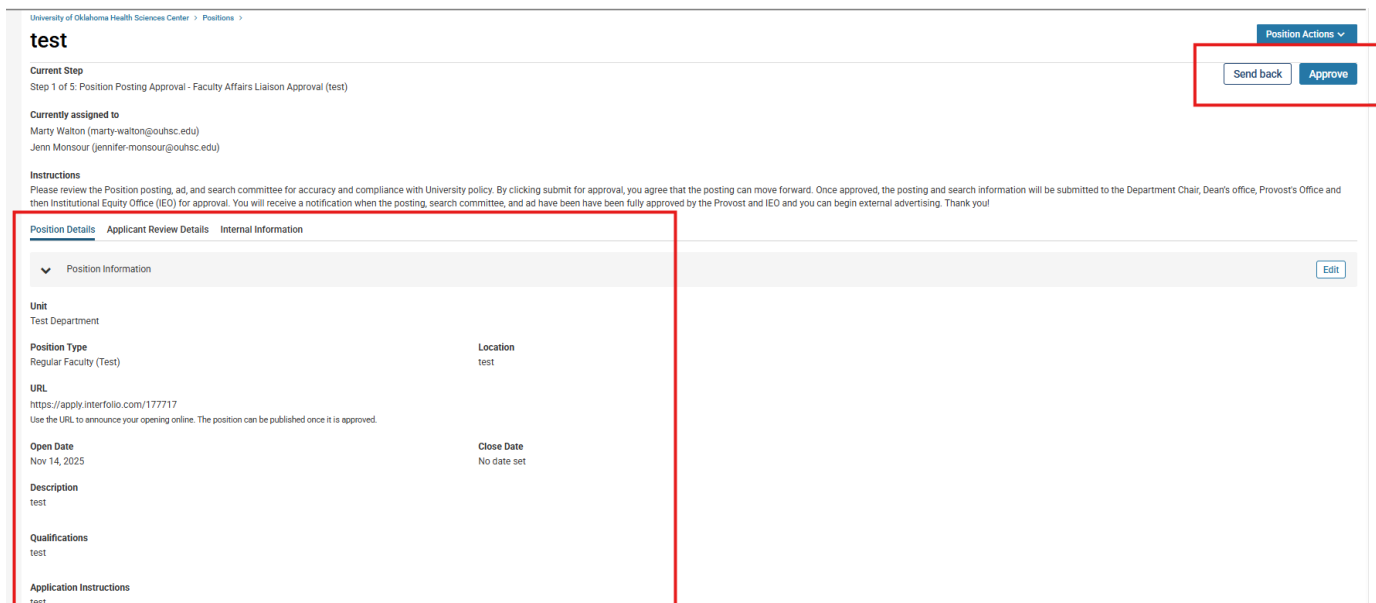
Once you open the position, you will be taken to the **Review** screen. Here you can verify:

Position Description: Ensure the text is accurate and complies with university policy

Qualifications: Check that required and preferred qualifications are correct.

Interfolio Settings: Verify the open/close dates and required documents.

Search Committee & Criteria: Verify the search committee and criteria details are correct and comply with university policies.



Taking Action (Approve or Send Back)

Once you have reviewed the details, look for the **Action Buttons** (usually located at the top right of the screen).

To Approve:

- Click the **Send To...** or **Move Forward** button.
- Select the next step in the workflow
- (Optional) Add a message if necessary.
- Click **Confirm**.

To Request Changes (Send Back):

- If the posting needs edits (e.g., committee issues or description errors):
 - Click **Send Back**.
 - Select the previous step or further back depending on where the error is.
 - **Required:** You must enter a message explaining what changes are needed so the administrator knows what to fix.
 - Click **Confirm**.

Reviewing and Approving a Candidate Selection

Once the Search Committee has identified a finalist, the selection must be approved before an offer letter can be generated. At this stage, you are reviewing the specific candidate's qualifications.

Locating the Pending Selection

Just like the position posting, you will receive an email notification.

- Log in to Interfolio and check your **Home Dashboard**.
- Look under the "**Your Action Needed**" section.
- Click the **Candidate's Name** (or the Position Title) to open the specific case.

The screenshot shows the Interfolio Home Dashboard. On the left is a navigation menu with items: Home, Faculty Search, Positions, Templates, Administration, Reports, and Users & Groups. The main area is titled "My Tasks" and shows two task counts: "0 Unread Tasks" and "1 Read Tasks". A search bar is located at the top right. Below the task counts is a table with columns for "Title" and "Due Date". The first row in the table has a blue link "test" under the "Title" column, which is highlighted with a red rectangular box. Below the link, the text "Test Department | Regular Faculty (Test)" is visible.

Reviewing the Candidate & Offer Details

You will be directed to the review page. There are distinct areas you should check:

- The Candidate Materials (The "Person") If you wish to review the candidate's CV or letters of recommendation, look for the "Read" button or the "Materials" tab at the top of the record.
- The Committee Ratings – in the section outlined.

University of Oklahoma Health Sciences Center > Positions > test

test

Current Step
Step 1 of 2: test

Currently assigned to
Marty Walton (marty-walton@ouhsc.edu)

Instructions
test

[Selected Applicant](#) | [All Applicants](#) | [Position Details](#)

Marty Walton

Status
Offer Pending [Change](#)

Tags
Add

Application Complete Add File Read

Documents

Title *	Date	Actions
CV	Dec 1, 2025	Delete Download
C.V.		

Internal Documents Add File

Materials

Title *	Date	Actions
No internal documents have been added.		

Ratings

Taking Action

Once you have verified the details, locate the Action Buttons (usually at the top right).

University of Oklahoma Health Sciences Center > Positions > test

test

Current Step
Step 1 of 2: test

Currently assigned to
Marty Walton (marty-walton@ouhsc.edu)

[Send back](#) [Approve](#)

- To Approve (move the candidate forward):
 - Click approve.
 - Select the next destination
 - (Optional) Enter a message for the next approver.
 - Click Confirm.
- To Return for Correction: If you may not be satisfied with the candidate or have questions:
 - Click Send Back.
 - Select the previous step.
 - Required: Enter a comment detailing exactly what needs to be addressed.
 - Click Confirm.

University of Oklahoma Health Sciences Center > test >

Send Back

Position

test

Send To *

test

Personalize Message

Include a personal message to the members receiving access.

From Name

Marty Walton

Subject *

Message *

Rich text editor toolbar with icons for Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, and Link.

Reply to email address

marty-walton@ouhsc.edu

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.

Helpful Resource Links (interfolio guides)

- **Close a Position and Select Applicant(s):** <https://product-help.interfolio.com/creating-and-managing-positions/close-a-position-archive-and-indicate-an-outcome>
- **Committee Rating and Review:** https://product-help.interfolio.com/en_US/creating-and-managing-positions/establish-custom-ratings-criteria-and-or-a-blind-review
- **Create an Application, Add Materials, or Request a Letter on Behalf of an Applicant:** https://product-help.interfolio.com/en_US/creating-and-managing-applications/create-an-application-on-behalf-of-an-applicant
- **Create and Manage Position and Application Statuses:** <https://product-help.interfolio.com/faculty-search-administration/create-and-manage-position-and-application-statuses>
- **Create/Manage Positions:** https://product-help.interfolio.com/en_US/creating-and-managing-positions/create-a-position
- **Download Application Materials:** <https://product-help.interfolio.com/evaluating-applications/download-application-materials>
- **Make Notes on Materials and Export Annotations:** <https://product-help.interfolio.com/evaluating-applications/make-notes-on-materials-and-export-annotations>
- **Managing Committee Members:** https://product-help.interfolio.com/en_US/creating-and-managing-positions/add-committee-members-and-managers-to-a-search-
- **Rate Applicants:** <https://product-help.interfolio.com/evaluating-applications/rate-applicants>
- **Read and Evaluate Applications Using the Document Reader:** <https://product-help.interfolio.com/evaluating-applications/read-and-evaluate-applications-using-the-document-reader>
- **Use Disposition Codes:** https://product-help.interfolio.com/en_US/faculty-search-administration/use-disposition-codes
- **Use Tags to Mark and Sort Applications:** <http://product-help.interfolio.com/m/27443/l/606182-use-tags-to-mark-and-sort-applications>
- **User Roles:** <https://product-help.interfolio.com/m/27443/l/530854-user-roles-in-interfolio-s-faculty-search>