

# Interfolio Faculty Search

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## User Guide - Search Committee

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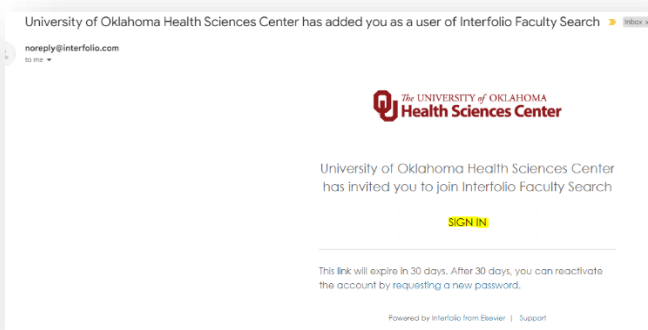
# Introductions and Tips

## 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, diversity officers to the applicants themselves. This online applicant tracking and recruitment system allows you to collect, view and discuss application materials securely

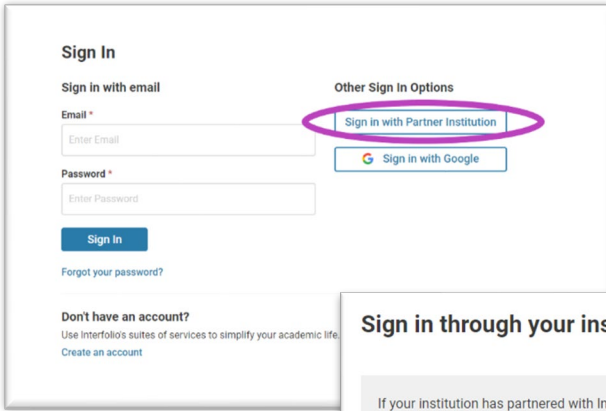
This guide is intentionally minimal so users—especially first time users—have a concise reference that covers the basics of evaluating applicants. Interfolio, however, has a wide variety of additional functionality to support or enhance the evaluation process. Please work with your Interfolio Administrator 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 OUHSC-specific recruitment requirements and may not reflect institutional settings put in place for OUHSC users.

A screenshot of the "Activate Account" form. The title is "Activate Account" and the subtext is "Your account is almost ready! Please enter a password to finish activating your account." The form includes an "Email Address" field with the value "thewalton3@gmail.com". There are two input fields for "First Name \*" and "Last Name \*" both containing "Test 2". A "Password \*" field is empty, with a "Show Password" checkbox. At the bottom, there is a checkbox for "I agree to Interfolio's Terms of Service." and a blue "Activate Account" button.

## Logging In from Your Interfolio Invitation

1. From your invitation email click "sign in"
2. You will be directed to: [www.interfolio.com](http://www.interfolio.com)
3. Complete the Activate Account Screen you will be prompted to complete. Do not forget to agree to the terms of service. Select "activate account".
4. You will be directed to the Home screen after completing the account activation.
5. To Log in after the initial set up you will Go to: [www.interfolio.com](http://www.interfolio.com)
6. Sign in with your email and password you created during the account activation
7. Once you log in, 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.

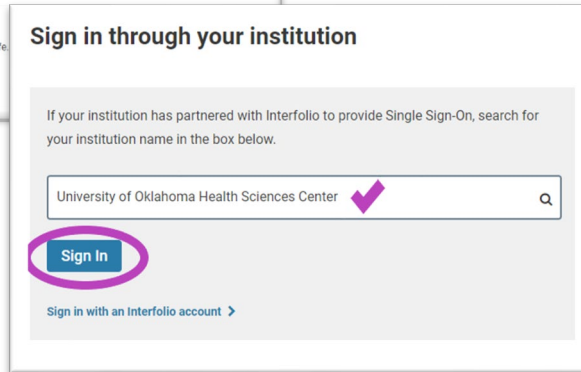


## Logging In with an OUHSC or OU.edu log in

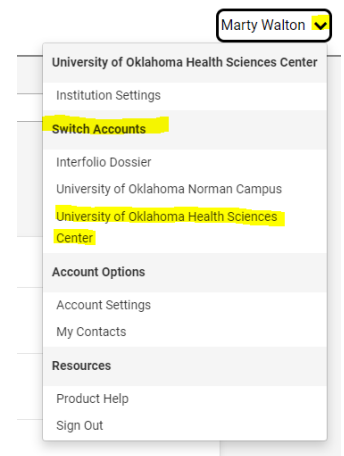
8. Go to: [www.interfolio.com](http://www.interfolio.com)

9. Select "Log In" in the upper right-hand corner. (do not enter a password at the initial screen).

10. 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 or OUHSC credentials.



11. Once logged in you may need to select your campus designation. The CU and RSU searches are located in the OUHSC 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".
12. Once you log in to OUHSC'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

### Evaluator User Role

Search committees are a necessary and integral part of recruitment goals and principles Evaluators are individuals assigned to one or more search committees or reviews by an Administrator or Committee Manager. Evaluators are charged with reviewing and evaluating applications. Evaluators cannot create or edit positions, change position or application statuses, or assign applicant disposition codes. If assigned to a search committee, you should receive an invitation from your unit's search Administrator notifying you of your Evaluator access to Interfolio.


### 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](mailto: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.

[EXTERNAL] University of Oklahoma Health Sciences Center has added you as a user of Interfolio Faculty Search

 marty-walton@ouhsc.edu <noreply@interfolio.com>  
To:  Walton, Marty (HSC)

 If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

 Reply  Reply All  Forward   Wed 7/24/2024 6:35 AM



University of Oklahoma Health Sciences Center has invited you to join Interfolio Faculty Search

[SIGN IN](#)

This link will expire in 30 days. After 30 days, you can reactivate the account by [requesting a new password](#).



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## 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](https://product-help.interfolio.com/en_US/about-dossier-accounts/manage-emails-from-interfolio#not-receiving-interfolio-emails-1)

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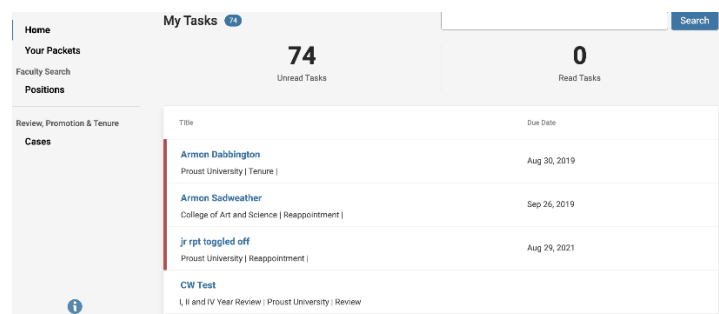
[SIGN IN](#)

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## 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](#)



Title	Due Date
Armon Dabblington Proust University   Tenure	Aug 30, 2019
Armon Sadweather College of Art and Science   Reappointment	Sep 26, 2019
jr rpt toggled off Proust University   Reappointment	Aug 29, 2021
CW Test L II and IV Year Review   Proust University   Review	

## 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.

- 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 your computers and possible security issues.

# Managing Applications

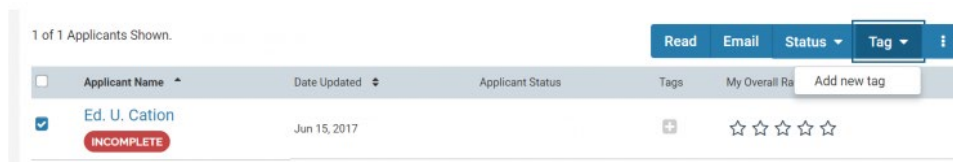
## Accessing Applications

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](#).



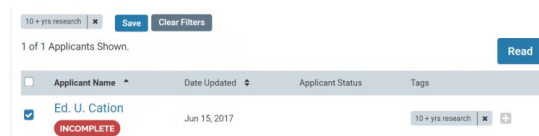
Interfolio Step by Step Guide - [Use Tags to Mark and Sort Applications](#).

## Filtering Applicants

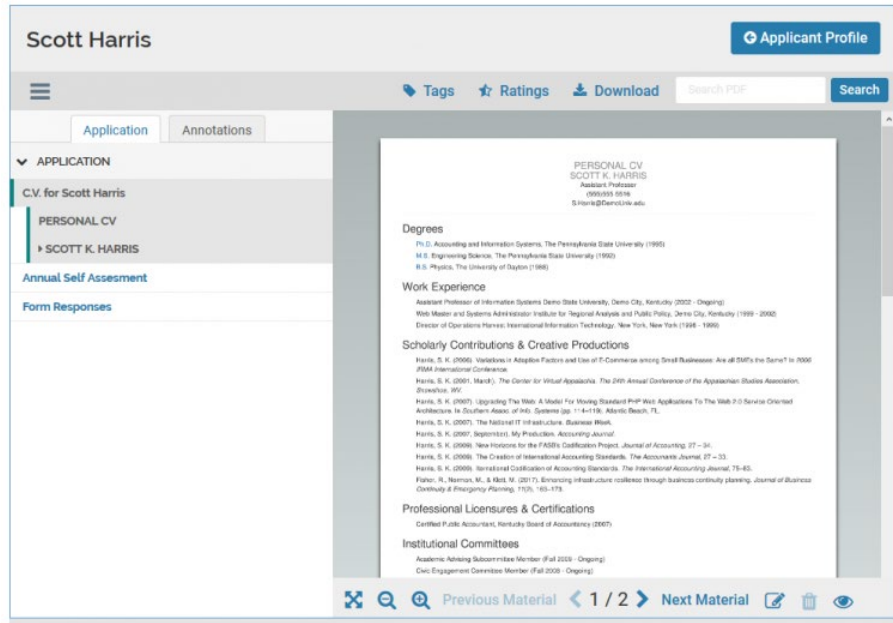
Click to filter to know who is on the long list and short list. If an applicant is checked, you will have action items available in blue.

## 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](#)

### 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.

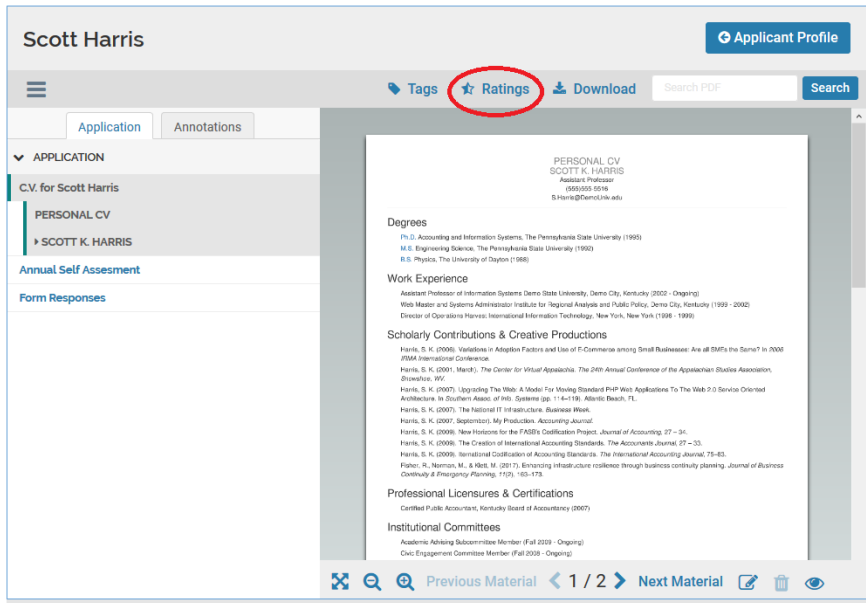
You can export all your annotations by clicking the export icon that appears to the right of the Annotations tab once you’ve made an annotation

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

### Rating Applicants

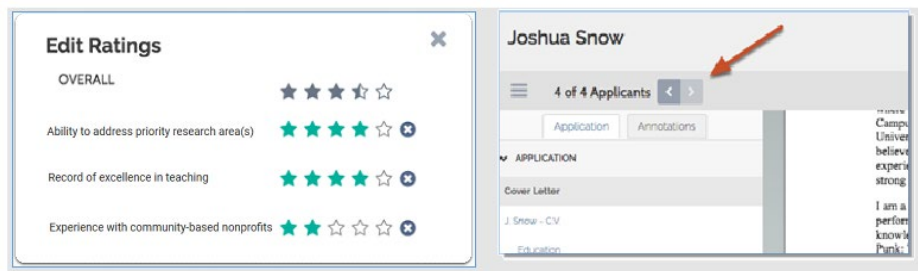
It is important to have defined criteria by which the committee will evaluate applicants. These criteria are referred to as the *rubric* or an *assessment rubric*. With the criteria in place, Evaluators will be able to review applications and assign a rating to each criterion. Applicants are never able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

# FAQs

## **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 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, , 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.

**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.