Interfolio ByCommittee
Committee Manager
Manual for Faculty Searches

Office of Faculty Advancement
2015-2016
San Diego State uses Interfolio ByCommittee for faculty searches. Interfolio ByCommittee is an online applicant tracking system that allows search committees to collect applications, view materials, and manage searches securely online.

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The Search Process at a Glance

Authorization and Plans

- The Dean of the college gives hiring priorities (and tenure-track request forms) to the Provost for approval.
- The Office of Employee Relations and Compliance (OERC) meets with search committees to go over procedures and policies.
- The Search Committee meets to:
  - Finalize ad
  - Formulate a search plan
  - Develop criteria
  - Establish ground rules for process to provide consistency.
- Upon review of ad and plan by OERC, documents are forwarded to Faculty Advancement.
- Faculty Advancement will:
  - Create Interfolio post and generate URL
  - Enter all search committee members into Interfolio
  - Post advertisements on Inside Higher Education, SoCal HERC, SDSU HR, and CSU webpages.
- Establish a consistent process for handling inquiries about the search
- Send rejection letters to applicants who do not meet the minimum criteria, and who will not possibly be considered.

Pool of Candidates to Interview

- Evaluate applicants using established criteria and enter notes into Interfolio.
- Select candidates for short list interviews based on rankings.
- OERC and the Dean receive the short list of applicants. OERC approves the pool.

Interviews

- Conduct Skype interviews to arrive at finalists. Maintain a pool of viable candidates from semi-finalists.
- Carefully design the interview process and campus visit to eliminate bias toward any candidate.
- Identify all persons and groups to be involved in the interview process.
- Develop an interview schedule.
- Develop the interview format to include:
  - Welcome
  - Questions asked of the candidate
  - Information given to the candidate
- Develop questions that relate to the position based on the job description. Insure that the interview protocol is not biased.
- Have each candidate teach a class, make a presentation or demonstration of other relevant job skills in a public forum during the on-campus process.
- Develop an interview ranking sheet. Update comments in Interfolio after interviews.
Campus Interviews
- Confirm interviews and campus visits with letters including an information packet about the position, department, and the university.
- Inform the university of any reasonable accommodations required.
- Provide opportunities for candidates to request meetings with particular individuals or groups in the university or local community.
- Insure candidates are given equal opportunities to meet and interact with campus colleagues.
- Plan schedules that are similar in format to insure an equitable basis for evaluation.
- Identify opportunities and organizations that could provide community and university resources for candidates.

Checking References
- Determine the stage of the search process at which reference checks will occur – if letters of recommendation are required at outset, other references may be asked for.
- Inform applicants that references will be checked.
- Determine questions to be asked of each reference.
- Identify appropriate time frame of the reference check to insure equity and consistency.
- Obtain permission to contact present employer.
- Obtain permission to contact references beyond the applicant’s authorized list.
- Verify receipt of degree, certificates, or licenses.
  - Where a degree, certificate, or license is required for a position, the campus is expected to verify possession of this credential. While receipt of a copy of the diploma, certificate, or license is acceptable, independent verification when feasible is preferred.

Final Recommendation and Hire
- The search committee completes evaluation of finalists and forwards a written evaluation/recommendation to the Dean. Upload recommendation to Interfolio.
- The Dean recommends the finalist to the Provost (via Faculty Advancement if an international hire) using the “Request for Approval to Negotiate” form.
- Notify OERC when the offer is made.

Search records shall be maintained for 2 years. For international hires, records shall be maintained for 5 years.
The Search Process Using Interfolio

This section of the guide walks you through the general steps of the search process in the order in which they will most likely happen. Faculty Advancement along with the Office of Employee Relations and Compliance (OERC) monitor the search process. With the shift to Interfolio, how a number of other search tasks are performed has changed.

Starting a Search

1. Once the job ad for a search is finalized and approved by OERC, Faculty Advancement creates the “Position” in ByCommittee.
   - Interfolio creates a unique URL for that position, which is added as a link to the job ad text. Applicants will click on this link to apply for the job.
   - A confidential, institutional-level EEOC form is automatically attached to each position.
   - Committees can add additional forms if needed; contact Faculty Advancement for details.

2. Faculty Advancement adds members to Interfolio ByCommittee and assigns them the appropriate roles:
   - All new users receive a welcome e-mail with instructions for logging on and creating a password when added to Interfolio. There is no notification they are assigned to searches; they will see those positions the next time they log in to interfolio.com. Users can have multiple roles if they are involved in more than one search. For example, a chair of an Arabic search who was also a member of a Linguistics search committee, he/she would have a Committee Manager role for the Arabic search and Evaluator's role for Linguistics. Users with multiple roles will need to select the “Change Role” option to select the position they would like to view.
   - The user roles are:
     - Committee Managers can not only view applicant materials but also manage the searches they participate in. For example, they can send individual or bulk emails to candidates, create reports, change the status of an applicant or position, and view averages of evaluator ratings. This is the role assigned to search chairs and may also be assigned to administrative coordinators (AC).
     - Evaluators can view applicant materials and rate applicants for the searches they are participating in. This is the role assigned to committee members.

3. Faculty Advancement posts the job ad to selected websites (Inside Higher Ed, HERC, CSU & SDSU HR faculty positions page). Departments/schools should also post the job ad to other sites as outlined in their recruitment plan, including the URL for the position.

4. Once the position has been created in Interfolio, an Application Acknowledgement message should be created by the search chair. [See Creating and Enabling an Application Acknowledgement Message, page 12.]
5. Applicants click on the link in the job ad to start applications and upload their documents. [See Interfolio from the Applicant’s Perspective, page 17.]

The Review Process in Interfolio

Once the committee is ready to begin reviewing materials …

1. The search chair (or AC) enters the search criteria approved by OERC into Interfolio. [See Entering Search Criteria, page 10.]

2. The search chair should make sure committee members have access to the Evaluator Quick Guide and discuss institutional best practices for reviewing applications, namely:
   o Reading applicant materials online in Interfolio to avoid proliferating copies of sensitive documents. (If a committee member prints out materials, these print-outs must be stored and disposed of in a manner that ensures candidate confidentiality.)
   o How to use Ratings. [See Rating Applicants, page 10.]
   o How the committee will use Labels. [See Labels, page 11.]
   o How to get help. [See Support and Troubleshooting, page 8.]

3. The search chair (or AC) should change the Position Status to “Reviewing Applications” on the review date listed in the ad. Applicants will see this status when they log in, and they will still be able update their dossiers if needed. [See Position and Applicant Status, page 10.]

4. The search chair (or AC) should use Interfolio to select and e-mail candidates whose dossiers are still incomplete to inform them the committee is ready to begin reviewing and remind them to upload any missing documents.

5. Throughout the review process, the search chair (or AC) can use Interfolio ByCommittee to generate reports that summarize applicant data in spreadsheet format for committee review or administrative use. [See Generating Reports, page 13.]

6. Once the search committee identifies a short list of candidates, the search chair (or AC) should change the Applicant Status for those candidates to “Short List.” At this point OERC must be contacted for certification of pool. The candidates will not know what status they have been given, and the change will not affect their ability to upload materials. [See Position and Applicant Status, page 10.]

The Final Stages of a Search

The search process will go through additional phases such as interviewing candidates and inviting them to campus.

• If the committee wants to request additional documents (such as writing samples or references) from a subset of applicants (e.g., short-listed candidates) they may do so. [See Collecting Additional Documents from Applicants, page 13.]
• Search chairs (or AC) can e-mail applicants through Interfolio to set up SKYPE or other interviews or make travel arrangements for on-campus visits.
• Note: Candidates who are not on the short-list cannot be brought back into the pool.
Candidates eliminated after preliminary interviews cannot be brought back into the pool.

- Search chairs must change the **Applicant Status** to "Interview" for candidates with on-campus interviews.

**Ending a Search**

Once an offer has been made *and a signed acceptance of the offer has been received*, the following steps will complete the search:

1. Change the **Position Status** to “Position Closed.” Change to **Applicant Status** to "Hired" for the individual who was hired. Candidates will see this status update if they log in to Interfolio and they will not be able to update their application materials. Evaluators will no longer see applicant materials for this search.

2. The search chair (or AC) should also directly communicate to unsuccessful candidates that a hire has been made and the position is closed. Such notification can be sent through Interfolio.

3. After all final communications are complete, Faculty Advancement will archive all of the Interfolio data from the search electronically for as long as the College is required to keep such records.
Support and Troubleshooting Interfolio

Documentation
More extensive, illustrated step-by-step instructions for most common tasks on Interfolio are available on Interfolio’s website.

To access them:

1. Click the Support button at the top of any Interfolio page.
2. Click on the ByCommittee Support tab, and then choose from the table of contents below or do a keyword search.

The Faculty Advancement Recruitment website also has resources posted to help with the search process and Interfolio (http://fa.sdsu.edu/recruitment.html).

Troubleshooting Tips
If you know how to do something but are having technical difficulties (i.e., the browser hangs, screen elements don’t show up correctly, etc.), try these trouble-shooting steps:

- Close your web browser, then re-open it, and try again.
- Clear your web browser’s cache, and then try again. Google “clear cache” plus the name of your browser (Chrome, Safari, Firefox) if you need instructions.
- Make sure your web browser is up-to-date. Usually there will be an update link in the browser menu bar, or Google “update” and the browser name for instructions.
- Try a different web browser. Interfolio works with Chrome, Firefox, Safari (v.5 and up), and Internet Explorer (v. 9 and up).
- Check your Internet connection. If it is spotty, try again when you are on campus or in some other place with a strong wireless or wired connection.

Getting Help
If you can’t find what you need in this manual or have technical difficulties here are the steps to take for support:

- Contact Interfolio Customer Assistance:
  - The Support button at the top right of the Interfolio ByCommittee screen opens Interfolio’s Help Center. Or, submit a help request to help@interfolio.com. You can also contact Interfolio’s Help Desk by telephone Monday-Friday, 9am-6pm EST at (877) 997-8807.
- If you are unable to find the answer to your question with Interfolio support, contact Faculty Advancement, 46111.
Quick Guide to Search Management Functions

You can access illustrated, step-by-step guides for all Interfolio functions by clicking the Support button in the top right of all screens, and then clicking the ByCommittee Support menu option. This guide is meant as a quick refresher for common functions.

When you log in to Interfolio, you land on the My Account page. All of the search management functions will be under the ByCommittee section of this page. If you have used Interfolio’s Dossier service or Letter Writer service, you may see these at the bottom of the screen. ¹

Click here to view your searches.

Click Open Positions to see the searches you are associated with, then click on the title of a search to open it. You will use the position screen that shows up to complete most management functions.

Check these boxes to view, add labels to, or change the status of applicants. If a label you just created isn’t showing up, refresh the screen.

The ratings you see will be averages. Evaluators can only see their own ratings if blind review has been selected.
Position and Applicant Status

There are two different types of statuses in Interfolio ByCommittee:

**Position Status** indicates the current phase of the search process. The default position statuses are Accepting Applications, Reviewing Applications, Interviewing Finalists and Position Closed. Applicants will see one of these statuses when they log into Interfolio. They will no longer be able to update application materials when the status is Position Closed. You can change a position's status in the upper left corner of the screen. Be sure to change the status to Reviewing Applications when the committee begins its review of materials, and to Position Closed after an offer is made and accepted. Also be sure that evaluators are still able to access applicant files during the review stage. This can be done by selecting “Edit” beside the application title and viewing the position status on the following screen:

If the screen shows evaluators cannot review applications, this can be changed by selecting the “change” link.

**Applicant Status** indicates a particular applicant's status during a search. Applicant statuses are useful for grouping candidates for committee review or administrative communication, such as short lists or interview lists. The default applicant statuses: New, Long List, Short List, Interview, Offer Pending, and Hired. Candidates do NOT see these statuses when they log into Interfolio, and they do not affect a candidate's ability to update his or her application materials.

- To apply a status to one or more applicants, click the box(es) next to their names in the list of applicants, then select the appropriate status from the Status drop-down menu. (See image, previous page.)
- Committee members can sort by status, by clicking Status in the Sort By options at the top right of the applicant list.

Entering Search Criteria

Before applicants can be rated, the search chair (or AC) needs to enter the OERC approved search criteria into Interfolio. This can be done on the position's edit page by selecting “Evaluation Settings”.
Rating Applicants
Evaluators (including the Search Chair) rate according to the criteria established by the Search Committee on a 5-star scale. To ensure fairness to all candidates, the Search Chair or selected members of the Search Committee should pre-screen all applicants to verify if they meet the minimum required criteria. An applicant who does not meet these criteria should be labeled "Not Qualified" and in the comments section the reason should be stated. Such applicants do not need further review.

Labels
Unlike Applicant Statuses, which can only be changed by Committee Managers, all committee members can create Labels and attach them to applicants. All committee members will see all labels. Labels can be used in a variety of ways, for example:

- Evaluators might create a label with their initials and apply it to applications they've reviewed.
- Search chairs might create a label with a meeting date, and use it to flag the applications the committee will discuss at that meeting.
- Labels might be used to tag applicants with particular qualifications – for example, if a job ad specifies a preference for applicants with research in a particular sub-field, you could create a label for that criteria, and Evaluators could use it to flag applications that demonstrate the desired experience.
- Labels should not be used to make illegal or discriminatory comments about applicants, and Search Chairs are responsible for ensuring committee members understand what is acceptable. Please refer any questionable cases to Faculty Advancement or OERC.
- Committee Managers and Administrators can view, change, and delete all labels, even those created and added by Evaluators. (Evaluators can change and delete their own labels.)
- Labels will be included with applicant dossiers when the search materials on Interfolio are archived, so they will become part of the college's legal record of the search.

Communicating through Interfolio

Communicating with Committee Members
Departmental administrators and search chairs can use the Internal Notes section of position page to post announcements, documents, schedules, and other information for committee members.

To do this:

2. Click the Edit button next to the position title.
3. Select **Internal Notes** from the Edit Position menu on the right of the screen.

4. Scroll down to type in **General Notes** and access the **Add File** button for sharing a document. Click **Update** when you are finished.

**Communicating with Applicants**

Interfolio by Committee allows you to e-mail applicants individually, and to batch-e-mail multiple applicants at particular stages in the search process.

**Creating and Enabling an Application Acknowledgement Message**

To automatically e-mail to applicants to inform them that their application has been received, you need to turn on this feature on the Position page.

1. Click the Edit button immediately under the position title (see picture on previous page)
2. Scroll down the first column, and set the text next to the envelope icon to “**Applicant will receive a message on application submission.**”

3. An Application Submission Email dialog window will open: type in a subject line and body text for the e-mail and click Save.

**Note:** This e-mail will only go out to applicants who submit after the automatic e-mail is set up. If applications have already been submitted for the position, you must send the acknowledgement e-mail to them manually, by selecting their name(s) in the applicant list and choosing E-mail.
Collecting Additional Documents from Applicants

If your committee would like to collect additional documents from candidates at a certain stage, you can do this easily through Interfolio. For example, if a committee wanted to see additional writing samples from short-list candidates, follow these steps in this order:

1. Apply the Short List status to the candidates from whom you wish to collect additional samples.
2. Now edit all other Application Statuses to prevent those applicants from uploading documents:
   - Click on the Administration link in the upper right menu.
   - Under Application Statuses, View/Edit All 3 Application Statuses. (Don't see this option? You may not be on the right Administration page. See Having Difficulty Accessing Position Administration Features? page 16)
   - Click Edit next to the statuses you need to change (e.g. “Long List” and “No Further Consideration,” etc.).
   - Uncheck “Applicants can update their application materials while this status is active.”
   - Click Done.
3. Now, click Add New Required Documents on the Position Administration page. Add the names and any descriptions of the documents you want to solicit from the candidates.
4. Finally, select all of the Short-List candidates and click E-mail to notify them that the committee has requested additional documents. The next time candidates with Short List status log in, they will be able to upload the new documents to their dossiers.
5. If an applicant gives you any additional documents during an interview, you are also able to create a PDF and upload them to applicant’s file if you add a new category for them.

Generating Reports

The Reports functions allow you to compile tables of data related to the search in a variety of ways. Below are a few of the most common.

Creating a Spreadsheet of Applicant Data

1. Click Reports in the upper right menu.
2. Select the Applications Report tab, then the department (under Unit) and Position you want.
3. Click in the Select Criteria box, and choose the data points you want to add to your report.
4. Click View Report (view on screen) or Download CSV (to download and open in Excel).
Creating a Spreadsheet for a Mail Merge
Follow the instructions above, choosing “First Name,” “Last Name,” “Address” and “Country” (if you have any foreign applicants) as your criteria and clicking the Download (CSV) button. Create your form letter, envelopes and/or mailing labels as you would normally, using the CSV file as your data source, and the column headings in this file as your fields. You may need to clean up some data after you’ve completed the merge, depending on how candidates entered it.

Compiling a List of E-Mails Sent through Interfolio
Interfolio also allows you to compile data about the e-mail messages you’ve sent certain to candidates the messages through the system. This can be useful if you need to check whether all candidates or a particular candidate has been informed of something. For example, let’s say you set up your Application Acknowledgement message after a few candidates have already started their applications. These candidates won’t get the acknowledgement message automatically, since it is only triggered when an application is started. You might want to run a report listing who among the current candidate pool had received the acknowledgement message, so that you can individually send it to those who didn’t.

To compile a list of e-mail messages:
1. Click Reports in the upper right menu.
2. Click the Systems Log drop down menu, and choose Applicant Messages.
3. Click either the Messages by Position (all messages sent for a search) or Messages by Applicant (all messages sent to one or more candidates) tab.
4. Then choose the Position and, if applicable, the names of one or more candidates.
5. Click View Report to see a list of messages that meet the criteria you’ve selected (you may
need to scroll down), the dates on which they were sent, and the individuals to whom they were sent. A report of “no data” means that no messages met those criteria.

6. Click **Download CSV** to download the list in a format you can open in Excel.

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**The Position Administration Page**

You will only need to click on the **Administration** link in the top left menu, if you have to edit position or application statuses for some reason, or want to set up automated e-mails to candidates. In many cases, you may never use this page at all.

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**Editing Application and Position Statuses**

We have set default Position and Application Statuses for all searches, which should be adequate in most cases. The only time you may need to change applicant statuses is if you need to request additional documents from a subset of candidates during the search (*see Collecting Additional Documents from Applicants, page 13*). Instructions for editing statuses are available online, and
you are welcome to contact Faculty Advancement staff for help doing this if you need to.

Keep in mind that settings for both types of statuses can control what candidates learn about the search and where they stand in it when they log into Interfolio. Be very careful when changing them. Generally speaking, it may be appropriate and helpful for candidates to be able to see Position Statuses (e.g., Accepting Applications, Reviewing Applications, etc.), but it is not appropriate for candidates to see their Application Status.

**Setting Up Automatic E-Mails**

Interfolio allows you to set up automated e-mails that get sent to one or more candidates when a specified trigger occurs – for example, to e-mail all candidates when the Position Status is changed to “Position Closed.” In all cases, you will be notified via a pop-up window before the triggered messages are sent and have the opportunity to cancel them if need be. You are welcome to use this feature if you would like, but please note that you don’t need to set up an automatic e-mail to send messages in bulk: you can simply select candidates in the position list and click Email to achieve the same effect, as shown under **Communicating with Applicants.**

**Having Difficulty Accessing Position Administration Features?**

Note that search management functions described above are only available when viewing the Administration page *for a particular position.* If you don’t see them, you may be on the Administration page for a department, rather than a position. For example, the screenshot below is a department-level view, listing all searches in the Chemistry department for which this particular user has access. We know this because a department is listed immediately under “Positions.”

To switch to the Administration view for a position within that department, click the **Change Role** drop-down menu and select that position. The name of the position will now appear under Positions. If you haven’t already, click **Administration** in the upper right menu to access search management options.
Interfolio from the Applicant’s Perspective

Applicants access Interfolio through a link provided in the job ad. If they do not already have an Interfolio account, they will be prompted to create one at no cost.

The link to the job ad will be active once the position is created and remains open until filled, unless a closing date has been set. If a new applicant clicks the link after the End Date, they will see a message that applications are no longer being accepted. Existing applicants can continue to upload documents or letters to their dossiers as needed, however.

Applicants can request and manage confidential letters of recommendation through Interfolio. An applicant simply e-mails a potential referee a request for a confidential letter that includes an individualized link for securely uploading it to Interfolio. When the referee uploads the letter to Interfolio, the candidate receives an e-mail notification that the letter is now part of his or her dossier, and logs in to attach that letter to the appropriate search applications manually. Candidates may forget this second step – if you have candidates missing letters, you might want to send a mass e-mail to them asking them to check Interfolio to see if letters have been uploaded and attach them or follow up with referees as needed.

Candidates are never able to view the contents of confidential letters or download them. Referees can only see the letters they have written for different individuals and any non-confidential documents (such as a CV or cover letters) those individuals have chosen to share with them.

Candidates should go to help.interfolio.com if they or their referees have any technical difficulties. Phone support is available from 9-6pm EST Monday-Friday.
Interfolio FAQ

Can committee members print application materials?
Committee members should read materials online. Having multiple people downloading or printing sensitive documents increases the risk that the confidentiality of search is breached. If a committee member prints out materials, printouts must be shredded to ensure candidate confidentiality.

Can search committees create and use additional labels?
Yes, Evaluators and Committee Managers can create labels. [See Labels, page 11.]

Will the administration be able to see ratings or labels that evaluators attach to applications?
Everyone who has access to a search can see all labels used during that search. Committee Managers and Institutional Administrators normally see the committee's average rating for candidates when they view a position. Faculty Advancement is committed to maintaining the autonomy and confidentiality that departments have previously experienced during the search process.

Do departments using Interfolio for searches need to maintain paper files of applicant search materials?
No, paper records are not needed for searches conducted through Interfolio. Faculty Advancement will archive all Interfolio materials related to the search once it is concluded and retain them for the required period.

Can Evaluators create or edit positions?
No, only Institutional Administrators and Committee Managers can do this.

What if searches receive paper or e-mail submissions?
If a search receives application materials outside of Interfolio, the search chair (or the AC) can create applications on behalf of these individuals and manually upload all associated documents for them.

Adapted from the Bryn Mawr College Interfolio Guide