Interfolio: Step-by-Step Guide for Search Committees Reviewing Faculty and Postdoc Candidates

**Step 1**: Log in to Interfolio using the following link: [https://account.interfolio.com/sso](https://account.interfolio.com/sso)
Select Tulane University from the drop down menu.
Click “Sign In”
**Step 2:** You will be redirected to a Tulane-branded page. Enter your username (part of the email without the “@tulane.edu”) and regular Tulane email password. Click “Sign In”. You will be redirected back to Interfolio’s landing page after logging in.

If you experience difficulties logging in, contact Alysia Loshbaugh ([akravitz@tulane.edu](mailto:akravitz@tulane.edu) or 862-8209.)
Step 3: You should see a page that looks similar to the picture below. Depending on your access, permissions, and history, you may see slightly different options.

For example, the “Promotion & Tenure” module toward the left in the center may not be an option if you do not participate in the P&T process. Likewise, if you are not undergoing any type of academic review this year, you will not see the “My Packets” section toward the bottom, directly underneath Promotion & Tenure.

Click on “View Positions” to access the positions for which you are on the search committee.
Step 4: Opening a Position to Review Applicants and Changing Roles

You should then see a page that shows you all the open positions in your default department, or shows you all the positions for which you are a member of a search committee. This depends on your level of permissions.

Click on the name of the position, and you’ll be taken to the list of applicants page.

If you don’t see the position you are looking for, try clicking “Change Role” above and select another unit in which the position may be posted. This may be the case for an interdisciplinary hire with faculty from multiple units.
**Step 4**: Opening a Position to Review Applicants and Changing Roles

Please note—at any time, if you get “lost” as to where you are in Interfolio, click “[Your Name]” and then “Dashboard” to be returned to your Interfolio landing page, the same page you see when you first log in. From there, you can click “View Positions” and navigate back to where you want to be. The “[Your Name]” button is visible on every Interfolio page.

Click on the position for which you want to review candidates.
**Step 5: Reviewing Candidates**
You are now on the page that lists each individual candidate. The candidate’s name is a hyperlink you can select to review that person’s materials. Simply click on the name of the person you wish to review. Underneath the candidate’s name is their highest degree and the institution where they earned the degree.

If “Blind Review” was selected by the search chair, you will not see the average rating of the candidate because you will only see your own ratings.

Tags are a freeform field and can be quite useful for a variety of reasons. For example, if you want to denote that you reviewed somebody, you can create a tag with your initials so that as you come and go from Interfolio, you can remember whose materials you’ve reviewed as whose you have not.

To add a tag, click the “+” button in the row of the candidate and a pop-up will appear. Click “add new tag”, type your tag, then hit “save”. This tag will be available the next time you want to tag a different candidate.
Step 6: Reviewing an Individual Candidate
We selected one candidate from the list to review his materials.

Any tags you added on the previous screen will appear here, or you can also add new tags here as well.
To return to the previous screen, the list of applicants, select “Return to Application List.”
Step 7: Reviewing an Individual Candidate

Depending on your level of permissions, you may not have all of the same options below. Search chairs have more options that evaluators, for example.

To read the candidate’s materials, you can either click on the hyperlink of the name of the document, or you can click the “Read” or “Download” buttons. “Download” allows you to save the materials to your computer, whereas “Read” opens the materials in Interfolio’s PDF viewer.

Search chairs and administrators can add documents to a candidate’s file by clicking the “+Add” button here. If a letter of recommendation is submitted directly to the chair/department and not through Interfolio, the letter can be uploaded via this method for all the evaluators to review. The candidate will NOT be able to view any documents uploaded by the search chair or administrators.
Step 8: Reviewing an Individual Candidate

In the PDF viewer, you can scroll up and down through all the documents and materials. You can also add comments or tags.
Step 8: Reviewing an Individual Candidate
You can add comments regarding the candidate using the “Add Comment” button. If your search chair created criteria by which to evaluate the candidates, then you should see a screen similar to what is below, in a “Ratings” section.

You can evaluate a candidate using the criteria set by the search chair using the star method—just click on the number of stars you wish to give that person on that particular criterion.

If “Blind Review” was selected by your search chair, then you will not see the overall ratings until “Blind Review” is turned off.
Step 9a: Changing a Candidate’s Status (only Search Chairs and Administrators)

After reviewing all candidates, you can change the status of the candidate to indicate which ones are moving forward in the search and which are not. This can be done individually on the candidate’s page or en masse from the applicant list. To change the status from the candidate’s individual page, click “down arrow” next to “n/a”. Select the appropriate status, such as “Long List”, “Short List”, “No Longer in Consideration”, etc.
**Step 9b:** Changing a Candidate’s Status (only Search Chairs and Administrators)

To change the status *en masse* from the applicant list, check the boxes next to the names of the applicants for whom you wish to change the status. Then click the “Status” drop down menu and select the appropriate option.
Step 9c: Changing a Candidate’s Status (only Search Chairs and Administrators)

When you change a candidate’s status, you MUST be careful to not accidentally email the candidate(s) if that is not your intent.

In our example on the previous page, I changed the status to “Long List”, and the following message popped up:

You can check the box if you wish to notify the candidate that their status has changed—this is up to the committee and/or the search chair based on the practices in the department. If you do not wish to notify candidates, do not check the box. If you do wish to notify candidates, such as to tell them they are no longer in consideration, then check the box.

Remember that all applicants whose boxes were checked will receive the same email, so you should address it generically, such as “Dear Applicant.”
Step 9d: Why Changing a Candidate’s Status is Both Important and Useful

If you have a two-part search, where you initially screen candidates and then want to request further information from them, perhaps an art portfolio or additional letters of recommendation, you do not want to ask all of your applicants to provide these materials—you only want to ask your short list. For example, if you have 80 applicants in a search, you perhaps only want additional materials from 15 of the 80.

If you change a candidate’s status to “No Longer In Consideration”, you can send them an email saying “thank you for your application but you are no longer in consideration.” Then, you can change their status to “Archive.” By archiving, you are removing them from the overall list of candidates, but there is still a record they applied for the position. In addition, after archiving those candidates no longer in consideration, you can add additional requirements to the application. Then you can use the ‘mass email’ function to send a “Dear Applicant” email asking the remaining candidates to log back into Interfolio to upload the additional information.
Step 10a: Emailing Candidates—Multiple Candidates (i.e. “mass email”)

As stated on the previous step, you may have a reason to email multiple candidates at the same time, perhaps to notify them that they are no longer in consideration for your search. All candidates will receive the same email, so you should address it generically, for example say “Dear Applicant”.

You can initiate this action from the list of applicants screen. First, select the checkbox next to each of the candidates you wish to email. Second, click the “Email” button. A new box will pop-up where you can type your message subject and the body of the message. Remember, you are emailing multiple people, so the email should begin generically as “Dear applicant”.

Please note another reason to use Statuses to organize your candidates is that you can also use the above Filter button to sort/filter only candidates with certain statuses.

Additionally, archiving and using statuses makes it easier to run reports, which is sometimes necessary.
**Step 10b: Emailing Candidates—Single Candidates**

You can also email a candidate individually for any reason. You can do this by following the process in step 10a (except only select one candidate’s name instead of multiple names) or you can do it from inside a candidate’s application materials. Simply click “Email Applicant” and complete the Subject and Body fields in the pop-up. This may be important if you want to solicit additional application materials from a particular candidate.
Step 11: Selecting a Final Candidate and Extending an Offer

Before you may formally extend an offer to a candidate, the search must be approved by the Office of Institutional Equity and the candidate’s credentials must be approved by the Provost’s Office.

Please visit http://tulane.edu/provost/Faculty/hiring-process.cfm for the flow chart of faculty hiring and other guidance documents on using our HR/Payroll system (HCM) to complete the hiring process. You may need to work with staff in the dean’s office in order to accomplish tasks in HCM.

Please contact Alysia Loshbaugh in the Provost’s Office with questions or problems, or if you require any other kind of assistance (504-862-8209 or akravitz@tulane.edu).