Interfolio Guide
Faculty Search Committees
Contents

• Action 1: Logging in to Interfolio
  • Step 1a: Interfolio.com
  • Step 1b: gibson.tulane.edu
  • Step 2: Single Sign On

• Action 2: Reviewing Applicants
  • Step 3: Positions Page
  • Step 4: Select the Position
  • Step 5: Application Page
  • Step 6: Review an Individual Candidate
    • Step 6a: Candidate Application Page
    • Step 6b: Candidate Documents
    • Step 6c: "Read" Candidate Documents
    • Step 6d: Ratings & Comments
  • Step 7: Changing a Candidate’s Status
    • Step 7a: Individual Statuses
    • Step 7b: En Masse Status Changes
    • Info: Significance of Status Changes
  • Step 8: Archiving Applicants

• Action 3: Communicating with Applicants
  • Step 9: Emailing Candidates
    • En Masse Emails
    • Individual Emails

• Action 4: Finalizing the Hiring Process
  • Step 10: Import to HCM
  • Step 11: Extending an Offer
Action 1: Logging in to Interfolio
Step 1a: https://account.interfolio.com/sso

Select Tulane University from the drop down menu and click “Sign In”
You may also sign in using the Gibson portal. To do this, go to “gibson.tulane.edu” and click “Sign in” at the top left corner.

On the following page, enter your single sign on credentials and click “Sign In”.
Now that you’re signed in, click the your respective link at the top of the screen. “Staff” is used in the example below. Depending on your permissions, you may see different options on this top bar.

Next, select “Interfolio” from the menu on the left side of the screen.
Action 1: Logging in to Interfolio

Step 2: Sign on using your Tulane Credentials

Through either option, 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 sign in.

If you experience difficulties signing in, contact Joey Couvillon (acouvil@tulane.edu) or 504-314-2816.
Action 2: Reviewing Applicants

Step 3: Click "Positions"

Once you are logged in, you will land on your “Home” page. This page will display any items from the Faculty Search or Review, Promotion and Tenure sections that need your attention.

To review applicants, start by clicking “Positions” on the menu to the left.
Action 2: Reviewing Applicants

Step 4: Select the Appropriate Position

You will be taken to the “Positions” page. On this page you will see all positions for which you have access.

Find your desired position among those listed and click the position title.
Step 5: Applicant Page

You are now on the “Applicants 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, the institution where they earned the degree, and the status of their application.

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.
We selected one candidate from the list to review his/her 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 the position title above the candidate’s name.
Action 2: Reviewing Applicants

Step 6b: Candidate Documents

Depending on your level of permissions, you may not have all of the same options below. Search chairs have more options than 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” button or the “Download” buttons located next to each document. “Download” allows you to save the materials to your computer, whereas “Read” opens the materials in Interfolio’s PDF viewer, shown on the next page.
Action 2: Reviewing Applicants

Step 6c: "Read" Candidate Documents

This is the “Read” PDF viewer. From here, you can scroll up and down through all the documents and materials in the application. You can also add comments, tags, and ratings.

Furthermore, you may download all or part of the candidate’s application by selecting download from this page.

Click “Applicant Profile” in the top left corner to exit the PDF Viewer and return to the previous page.
Action 2: Reviewing Applicants

Step 6d: Ratings & Comments

After returning to the Applicant Profile page, scroll down.

If your search chair created criteria by which to evaluate the candidates, then you should see a screen similar to what is below, in the “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. You can also add comments regarding the candidate using the “+ Add Comment” button.

If “Blind Review” was selected by your search chair, then you will not see the overall ratings until “Blind Review” is turned off.
Action 2: Reviewing Applicants

Step 7: 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 Applicants Page. To change the status from the candidate’s individual page, click “change” next to “n/a”. Select the appropriate status, such as “Long List”, “Short List”, “No Longer in Consideration”, etc.

Click “Save” in the pop up window to confirm the selection.
Action 2: Reviewing Applicants

Step 7 info: En Masse Status Changes

(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.
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.”
Action 2: Reviewing Applicants

Step 8: Archiving Applications

Similarly to *En Masse* status changes and emails, you can archive applications by returning to the Applicants Page, clicking on the “…” button, and selecting “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 9: Emailing Candidates — *En Masse* Emails

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.

You can initiate this action from the Applicants page. 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”. All selected applicants will receive the same email.

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.
You can email a candidate individually for any reason. You can do this by following the same process as *En Masse* emails (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.

Please note the “Reply to email address” is the address which will receive replies from candidates.
Action 4: Finalizing the Hiring Process

Step 10: Import to HCM

Once you have Identified a final candidate and would like to extend an offer, you must first upload the candidate’s information to HCM. To do this, you need to change the candidate’s status in Interfolio. Follow the instructions from Step 7 and select “Import to HCM.”

Imports are done twice a day, once in the morning and once in the afternoon. Look in HCM around these times to see if your candidate has been imported. As of now, you will not be notified once the candidate has been imported to HCM.
Before you may formally extend an offer to a candidate, the candidate’s credentials must be approved by the Provost’s Office.

Please visit https://academicaffairs.tulane.edu/faculty-postdoc-hiring-process 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 Joey Couvillon in the Provost’s Office with questions or problems, or if you require any other kind of assistance (504-314-2816 or acouvil@tulane.edu).
Questions?

Contact:
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