

# INTERFOLIO APPLICATION TRACKING SOFTWARE

## Training Document

### BASIC INFORMATION

**Interfolio Administrator Log-In Page:** <https://account.interfolio.com/login>

#### Login Credentials:

Use email invitation from Interfolio with prompts to create password

\*Didn't receive an email? Contact HR

### HUMAN RESOURCES ROLE

- Create positions within Interfolio
- Add new users to Interfolio system
- Provide support and best practice guidance for software

### ADMINISTRATOR/COMMITTEE MANAGER ROLE

#### Managing a Search (Administrator or Committee Manager)

As an administrator or Committee Manager of the position search, you have additional permissions through Interfolio

#### Reviewing Applications

- Upon logging in, you will be sent to your “dashboard” – select “Positions” in left navigation bar
- Select title of position to review applicant list
- Within specific candidate's materials:
  - Open each file individually (e.g. resume)
  - On right side, select “Read” to open the document reader to view all files within applicant materials
    - If using reader, you may leave annotations/notes that are unique (and private) to each user
- Within specific candidate's materials:
  - Set rating (if using) by “star” ranking
  - Add comments/notes

#### Managing Your Search

Please note: Your evaluators/committee members will not be able to review applications until you've changed the position status to “Reviewing Applications.” The administrator/committee manager for the search manage the following:

- Manage position statuses
- Manage application statuses
- Determine review schedule/committee
  - Will you review all applications first to ensure they meet minimum qualifications?
  - Will you utilize blind review (evaluators cannot see others' ratings/comments)?
    - Edit Position > Position Information > Evaluation Settings > Edit > Select “Blind Review”
- Set criteria (star ratings)
  - Edit Position > Position Information > Evaluation Settings > Edit > Add Criterion
  - You should establish what criteria the candidates will be rated by you/committee members
    - E.g. leadership, scholarship,
- Identify your search committee (if necessary)
  - Edit Position > Position Information > Search Committee > Edit > Add Member/Manager
  - Don't see who you're looking for? Contact HR to add a new user to the system

**Position Status (\* ONLY Committee Managers can update Application Status)**

To change a position status:

- Select position to review
- Select “Positions Actions” (blue button on right)
- Select “Edit Position”
- Under “Position Status” (Top Middle), select blue “change” link

POSITION STATUS	DESCRIPTION	CANDIDATE ABILITIES	EVALUATOR ABILITIES
Accepting Applications	The College is accepting applications for this position	<ul style="list-style-type: none"> <li>▪ Candidate can view status</li> <li>▪ Candidate can update materials</li> </ul>	Evaluators can review
Reviewing Applications	The committee continues to accept applications for this position, however the review process has begun with full consideration given to those candidates with complete applications on file	<ul style="list-style-type: none"> <li>▪ Candidate can view status</li> <li>▪ Candidate cannot update materials</li> </ul>	Evaluators can review
Position Closed	No longer recruiting for this position (i.e. the position was filled or position eliminated)	<ul style="list-style-type: none"> <li>▪ Candidate can view status</li> <li>▪ Candidate cannot update materials</li> </ul>	Evaluators cannot review

**Application Status (\*ONLY Committee Managers can update Application Status)**

To change an application status:

- Select candidate to review
- Under “Status’ (top middle)
- Select “change” (blue link)
- Select application status from dropdown list

As the Committee Manager, you may choose to review all candidates for meeting minimum qualifications before the committee members review application.

APPLICATION STATUS	DESCRIPTION	CANDIDATE ABILITIES	EVALUATOR ABILITIES
Application Received	Application has been received	<ul style="list-style-type: none"> <li>▪ Candidate can view status</li> <li>▪ Candidate can update materials</li> </ul>	Evaluators can review
Additional Materials Requested	Email sent to candidate requesting additional documentation (e.g. letter of reference, transcripts)	<ul style="list-style-type: none"> <li>▪ Candidate can view status</li> <li>▪ Candidate can update materials</li> </ul>	Evaluators can review
Shortlist	Top Candidates You expect to conduct a phone screening with these candidates	<ul style="list-style-type: none"> <li>▪ Candidates cannot view status</li> <li>▪ Candidates cannot update materials</li> </ul>	Evaluators can review
Longlist	Solid candidates, but not your strongest. You will consider these candidates, if your Shortlist is unsuccessful	<ul style="list-style-type: none"> <li>▪ Candidates cannot view status</li> <li>▪ Candidates cannot update materials</li> </ul>	Evaluators can review
On-Site Interview	Offered campus interviews	<ul style="list-style-type: none"> <li>▪ Candidates cannot view status</li> <li>▪ Candidates cannot update materials</li> </ul>	Evaluators can review
Does Not Meet Minimum Qualifications	Upon review of application, the candidate does not meet the minimum qualifications of the position and will no longer be considered	<ul style="list-style-type: none"> <li>▪ Candidate can view status</li> <li>▪ Candidate cannot update materials</li> </ul>	Evaluators can review
Candidate Withdrew From Consideration	Candidate has voluntarily removed themselves	<ul style="list-style-type: none"> <li>▪ Candidates can view status</li> <li>▪ Candidates cannot update materials</li> </ul>	Evaluators can review
Hired	Candidate was offered/accepted position	<ul style="list-style-type: none"> <li>▪ Candidate can view status</li> </ul>	Evaluators can review

		▪ Candidate cannot update materials	
--	--	-------------------------------------	--

### Example Review Process:

- Review each application for elimination purposes; upon initial review change the application status to either:
  - *Application Received*: meets all minimum qualifications from job description/advertisement
  - *Does Not Meet Minimum Qualifications*: does not meet all minimum qualifications and should not move forward in review process. If you would like to consider a candidate that does not meet the minimum qualifications, contact Human Resources for guidance.
- Further review of all *Application Received* candidates
- Update status for those candidates that you give further consideration to *Longlist*
- Further review of all *Longlist* candidates to determine your top candidates
- Update the status for those top candidates to *Shortlist*
- More formal review of the *Shortlist* candidates by a phone interview or a screening questionnaire used for all applicants in this narrowed category. Based on this formal review, determine who will be offered on-site interviews (on-campus or via video-conferencing/remote resource).
- Update status for those candidates that are offered an *On-Site Interview*. This is typically the last step before extending an offer (in rare instances a 2<sup>nd</sup> interview may be needed). Typically, 3-4 candidates are evaluated by on-site interview. Please consult HR if fewer than 3 or greater than 4 individuals will be invited for on-site interviews.

### Criteria (Star Rating):

- Select position to review
- Select “Positions Actions” (blue button on right)
- Select “Edit Position”
- Scroll down to “Evaluation Settings” – select blue “Edit” link
- Select “+Add Criterion”
- Add Criterion that you would like Evaluators to rate zero-to-five stars
  - Specific: E.g. leadership, international experience, research, etc.
  - General: Set one criterion to “Overall”

## EVALUATOR ROLE

**Interfolio Log-In Page:** <https://account.interfolio.com/login>

### Login Credentials:

Use email invitation from Interfolio with prompts to create password.

\*Didn't receive an email? Contact HR

### Reviewing Applications

- Upon logging in, you will be set to your "dashboard" – select "View Positions" button
  - If necessary, change your "unit" – left side under "Positions," select blue "change" link
- Select title of position to review applicant list
- Within specific candidate's materials:
  - Open each file individually (e.g. resume)
  - On right side, elect "Read" to open document reader to view all files within applicant materials
    - If using reader, you made leave annotations/notes that are unique (and private) to each user

### Your Responsibilities as an Evaluator

- Within specific candidate's materials:
  - Set rating
  - Add comments

## ALBION COLLEGE SUPPORT

### Catherine Lessnau

Human Resources

(517) 629-0205

[clessnau@albion.edu](mailto:clessnau@albion.edu)

### Lisa Locke

Human Resources

(517) 629-0205

[llocke@albion.edu](mailto:llocke@albion.edu)

## INTERFOLIO SUPPORT

### Interfolio Webinars

<http://learn.interfolio.com/webinar-2016-creating-managing> (Start at 31:30)

<http://learn.interfolio.com/webinar-2016-managing-evaluating>

### Interfolio User Guides

- All Help Guides and Search Function: <http://product-help.interfolio.com/m/27443>
- Commonly Used Help Guides:
  - [Creating a Position Posting](#)
  - [Adding or Editing Document Requirements](#)
  - [Managing a Position](#)
  - [A Committee Manager's Guide to ByCommittee Faculty Search](#)
  - [An Evaluator's Guide to ByCommittee Faculty Search](#)
  - [An Applicant's guide to applying to a ByCommittee position](#)
  - [Help Evaluating Applications](#)
  - [Reporting on your Faculty Searches](#)