Sign-In to Interfolio

To sign in through your institution at account.interfolio.com

Click the "Partner Institution" button

Search for or select your institution from the dropdown and click "Sign In"
Understanding User Roles in Interfolio’s Faculty Search

**BEST PRACTICE**

It is recommended that units assign an Administrator — instead of a Committee Manager — to manage the search and work with the search committee. This is typically a staff member. Some Interfolio institutions assign the Committee Manager role to the search committee chair, this is at each department’s discretion since the role has the ability to edit the search (accidentally or intentionally) which could result in serious complications to application data and workflow. To avoid this risk, search committee members could be assigned the Evaluator role and a search committee representative would communicate with the Administrator to make sure that statuses and applicant communication are administered as intended.

**Administrator** – Every hiring unit must have at least one assigned Administrator and can have more than one. FS Administrators are typically staff who are well-versed in coordinating academic personnel recruitment.

College-level Administrators can create, supervise, manage, monitor, and close searches at the college level or in any department within that college; department-level Administrators are assigned by the college-level Administrator and can create, supervise, manage, monitor, and close all searches at the department level.

**Committee Manager** – Assigned by Administrators to coordinate a particular search; can edit settings and statuses, view reports, communicate with applicants. This is an optional role. Please review the BEST PRACTICE box to the left.

**Evaluators** – Assigned by department-level or college-level Administrator; appropriate role for members of the search committee charged with viewing, reviewing, and rating applications; cannot create/edit positions.

**EEO Officer** – This role is reserved for the EEO Compliance Manager/EEO Officer at TAMU.

**Interfolio Faculty Search User Role Capabilities**

**User Management:**

Roles within Interfolio will be assigned by the college and/or department administrator for their unit. This role will automatically update the role in the Faculty Hiring Portal. A DOF Portal Access Form will not be needed for Hiring (only submit for FDL and Credentialing).

Within the administrator role, you will be required to assign a title for each user. This will drive the appropriate routing. The different titles that can be assigned are: Department Reviewer, Department Head, College Reviewer, Dean, Dean of Faculties Process/Approval. The appropriate title is paramount to routing new positions correctly. You can assign multiple individuals to the same role and title (i.e. Department Head and Associate Head to the Department Head title). The system doesn’t allow for users to assign a delegate or approve via proxy.
For those users that are outside of Texas A&M University, a request for a temporary non-affiliated account will need to be made.

Creating a Position:

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. If you have Administrator access, you should see any positions to which you have access displayed in a table. To create a new position, click the New Position button in the top right corner of the window.

A window will open and you will need to choose the most appropriate level of your position from the Select Type drop down menu. The Position Type will determine the approval routing for your position.
To determine your Position Type, consult the Faculty Hiring Guidelines. Then select the appropriate Position Type from the drop down menu. You will only be able to choose one of the five options listed below.

After selecting the position type (track), you will need to select the unit where the new position will be located from the ‘Search For or Select Unit’ drop down menu. All academic unites should be loaded into the menu for you. If you don’t see your unit, contact the Office of the Dean of Faculties. Additionally, you will only be able to choose the department for which you are an administrator.

Finally, you can choose to either create the new position from scratch or clone (use settings from) an existing position. If you clone a position, you will have the opportunity to edit aspects of the position you wish to change from the original.

Once you set the Position Type (track) and click Create, you will not be able to edit the Position Type. If any of the approvers determine that the Position Type needs to be corrected, you will have to start the Create a Position process from scratch.

To move to the next step, click Create.

Defining the Position

Provide general information about the position

In this section, you will provide basic information related to the position/search.

1. **Position Title** – To create continuity that supports reporting and a user-friendly applicant interface, position titles should contain the **tenure type and the faculty title**, all spelled out (e.g., *Tenure – Track: Assistant Professor*). Avoiding the use of abbreviations is especially important because it helps applicants effectively navigate the Job Board and will help you easily find positions on your positions list.

   - If the appointment will have the adjective is Clinical, Instructional, Executive, or Visiting, this identifier should be added before the rank (e.g. *Academic Professional Track (Non-Tenure): Clinical Associate Professor*).
If you are conducting an open rank search for a single position, it is recommended you note it is open rank and identify the tenure type. (e.g., Tenured/Tenure-Track: Open Rank)

- The location and the department are not included in the title as these will automatically populate on the job board with the position ID.

- See next page for Possible Position Titles
### Possible Position Titles

<table>
<thead>
<tr>
<th>Academic Professional Track (Non-Tenure)</th>
<th>Research (non-tenure)</th>
<th>TAMUQ Titles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Professional Track (Non-Tenure): Open Rank &amp; Title</td>
<td>Research: Open Rank</td>
<td>Rolling Contract Track: Open Rank</td>
</tr>
<tr>
<td>Academic Professional Track (Non-Tenure): Open Rank-Clinical</td>
<td>Research: Research Assistant Professor</td>
<td>Rolling Contract Track: Assistant Professor</td>
</tr>
<tr>
<td>Academic Professional Track (Non-Tenure): Open Rank-Instructional</td>
<td>Research: Research Associate Professor</td>
<td>Rolling Contract Track: Associate Professor</td>
</tr>
<tr>
<td>Academic Professional Track (Non-Tenure): Open Rank-Executive</td>
<td>Research: Research Professor</td>
<td>Non-Rolling Contracts will follow the possible titles in the other columns</td>
</tr>
<tr>
<td>Academic Professional Track (Non-Tenure): Open Rank-Adjunct</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Professional Track (Non-Tenure): Open Rank-Of the Practice</td>
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<tr>
<td>Academic Professional Track (Non-Tenure): Open Rank-Lecturer</td>
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</tr>
<tr>
<td>Academic Professional Track (Non-Tenure): Instructional...*</td>
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<tr>
<td>Academic Professional Track (Non-Tenure): Clinical...*</td>
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<tr>
<td>Academic Professional Track (Non-Tenure): Executive...*</td>
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<td>Academic Professional Track (Non-Tenure): Adjunct...*</td>
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<tr>
<td>Academic Professional Track (Non-Tenure): ... of the Practice*</td>
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<tr>
<td>Academic Professional Track (Non-Tenure): Lecturer</td>
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<tr>
<td>Academic Professional Track (Non-Tenure): Senior Lecturer</td>
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<td></td>
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<tr>
<td>Academic Professional Track (Non-Tenure): Visiting...*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Professional Track (Non-Tenure): Veterinary Intern</td>
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<tr>
<td>Academic Professional Track (Non-Tenure): Veterinary Resident</td>
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<td></td>
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<tr>
<td>Academic Professional Track (Non-Tenure): Lab Instructor</td>
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</tr>
</tbody>
</table>

*Insert specific rank for the “…” if you are advertising for one title. If you are wanting to search for multiple ranks within a given title, you would utilize the appropriate “Academic Professional Track (Non-Tenure): Open Rank”

<table>
<thead>
<tr>
<th>Tenure Review Upon Hire</th>
<th>Tenured/Tenure-Track</th>
<th>Tenure -Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenured: Open Rank</td>
<td>Tenured/Tenure-Track: Open Rank</td>
<td>Tenure -Track: Open Rank</td>
</tr>
<tr>
<td>Tenured: Associate Professor</td>
<td>Tenured/Tenure-Track: Assistant Professor</td>
<td>Tenure -Track: Assistant Professor</td>
</tr>
<tr>
<td>Tenured: Professor</td>
<td>Tenured/Tenure-Track: Associate Professor</td>
<td>Tenure -Track: Associate Professor</td>
</tr>
</tbody>
</table>
2. **Location** – Enter the city/campus of the position location.

3. **Position Type** – This field is auto populated from the selection you made on the previous screen.

4. **Open Date** – *This is the date that you are creating the position in Interfolio.* Regardless of what date is entered, the position won’t go live until it has been reviewed and approved through the approval chain. The system will allow you to enter a future date, but keep in mind, it won’t actually post until the date entered AND all approvals have taken place. Depending on the volume of searches and whether approvers have questions or request changes, the approval process could take a few days. Units should have realistic expectations when submitting a position request.

5. **Deadline (Position Closes)**
   - **Specific Date:** If you want to stop receiving applications by a specific date and review what has been submitted to date, you would choose “Specific Date”. This is the date that you want to stop receiving applications.
     - If you wish to continue receiving applications beyond the initial application deadline, you can edit the “Specific Date” field to a later date. Extending the Position Closes date after the search has been approved will not require another round of approvals.
   - **Rolling Deadline:** If you would like to keep accepting applications until a hire has been identified, then you would choose “Rolling Deadline.”

    *In either scenario, you will still have to manually close the position when you are ready to stop receiving applications.*

**Building the Job Posting**

The following text fields combine to serve as the position announcement visible to applicants. Advertisements posted in journals, listservs, and other recruitment outlets should mirror the language entered here. The Administrator should make sure the content of these sections align with search committee and/or unit leadership expectations of the position and the search.
Units who anticipate the potential to hire a non-U.S. worker whom they would want to sponsor for permanent residency should carefully review additional position description, qualification, and advertising requirements.

**Position Description**

In the Position Description field, describe the position and invite job seekers to apply. This is your advertisement. At a minimum, this section must include:

1. **Appointing unit**
2. **Faculty title(s) that you advertising for (must be in alignment with position title and position type)**
3. **Discipline/Area of specialization and sub-discipline if applicable**
4. **Indication of full or part time status or potential for either**
5. **Service period (e.g., 9 month, 10 month, 11 month)**
6. **Track-type (i.e. tenured, tenure-track, Academic Professional Track (Non-Tenure), or research track)**
7. **Anticipated start date**
8. **Number of positions your search is approved to hire (e.g., The College of Science invites applications for up to three full-time Lecturer positions in...)**
9. **Brief essential functions or expectations of the position (e.g. The successful candidate will be expected to...). Be clear on specifying the teaching, research, and service expectations.**

When crafting the Position Description, keep in mind that you are trying to recruit the best people to come to Texas A&M University. Include positive, inviting language. Briefly highlight why your unit would be a great place to work and what the position entails. Work for clarity and brevity in your description. Think about expectations in terms of primary duties or general categories.

**Position Description Template:**
The Department of [insert name of appointing department], College/School of [insert name of appointing unit] at Texas A&M University invites applications for a [if hiring more than one position, indicate number of positions] [indicate full-time, part-time, or indicate potential for either], [indicate track-type, i.e., tenured, tenure-track, Academic Professional Track (Non-Tenure), or research track] position with a [indicate service period, e.g., 9-month, 11-month, etc.] academic appointment beginning [anticipated start date]. Applicants will be considered for the faculty titles of [insert specific faculty title(s) advertising for, must be in alignment with position title and position type] depending on qualifications. [Insert information for discipline/area of specialization and subdiscipline if applicable.]

[Insert brief essential functions or expectations of the position (e.g., The successful candidate will be expected to...) Be clear on specifying teaching, research, and service expectations.]
[Briefly highlight why your unit would be a great place to work.]

**Position Description Example:**
The Department of Visualization, College of Architecture at Texas A&M University invites applications for up to three full-time Academic Professional Track (Non-Tenure) positions with a 9-month academic appointment beginning fall semester 2020. Applicants will be considered for the titles of Instructional Assistant/Associate/Full Professor depending on qualifications. This position is defined as animation but includes a range of possible specializations including digital systems, processes, tools in design, graphics, and the human-centered design of objects and environments both real and virtual.

Responsibilities for this position include teaching at the graduate and undergraduate levels, and service to the department, university, and the field, including outreach to industry. The successful candidate will be expected to teach studio, lecture and seminar courses at both the graduate and undergraduate levels.

The Department of Visualization encompasses the technology, art, and science of visual communication. The department encourages and maintains a vigorous interdisciplinary blend of the visual arts and the related visual and imaging sciences and technology. Academic programs include the B.S., M.S. and MFA in Visualization, with approximately 400 students. Our mission is the development and implementation of emerging methods for enhancing understanding and gaining insight through visual means in teaching, research, and creative work that impacts future directions of the field. The reputation of our graduates as skilled, creative visual problem solvers has led to strong ties to the animation, visual effects, and game industries. Information about the Department of Visualization is available at [http://viz.arch.tamu.edu/](http://viz.arch.tamu.edu/).

**Qualifications**

In the Qualifications field, enter required educational requirements, qualifications, any teaching/research and or service experience requirements and desired/preferred qualifications, as applicable. Remember to consult with search committee and/or unit leadership on qualifications before entering them into the faculty search module.

Please be aware that stating preferred/desired qualifications could potentially cause issues if the department ends up hiring a foreign national in a position that qualifies for permanent residency. If you wish to list preferred qualifications, keep in mind that the Department of Labor treats these as requirements.

**Application Instructions**

All applications materials should be submitted through or uploaded to Interfolio. Be clear about what materials are required and the preferred/required format of those materials. See the list of accepted file types and document types below. We accept the following file types:

- DOC
- DOCX
- DOT
- ODT
- WPD
- RTF
- TXT
- HTML
- PDF
- Links to webpages
- Links to videos hosted by YouTube and Vimeo.

Later in the Create a Position process, you will need to tell the system what documents to prompt applicants to submit. The instructions you enter here should align with what you tell the system later in the process.
This section is also the place where you should articulate the initial review deadline if you have one (e.g., “Complete applications received by (DATE), will be given preferred consideration” or “Initial deadline for receipt of complete applications is (DATE)”).

Also include a point of contact with a name and email address here.

Equal Opportunity Statement and Commitment to Diversity

Texas A&M University has configured FS to automatically populate the Equal Employment Opportunity field with our EEO Statement and a Commitment to Diversity Statement. These statements will be appended to all job postings in FS and cannot be changed/deleted. The unit does not need to take any action in this field.

Click Save & Continue.

Required Documents

Here you can add the documents your applicants must submit with their application. You can set the document type such as C.V., or Peer Evaluations, and set the number of documents necessary to fulfill the requirement. For instance, you might require one C.V. and three peer evaluations.

Your applicant can upload these documents and submit them electronically when applying for a Faculty Search position. The applicant will need to upload the exact number of each document type that you set in order to fulfill the requirement. When a requirement is filled the check mark will turn green.
Click “Add Requirement”

Select the document type from the dropdown list

You will be presented with a list of typical documents such as cover letters, C.V., transcripts, and letters of recommendation.
Set the number required of that document type

Add an optional note with any special instructions or other information about the requirement and click "Save" when you are finished
You have the option to allow applicants to add additional documents in addition to what is being required.

You must check the box to “Send a message on application submission” if you would like your candidates to automatically receive confirmation of their application. This message is completely customizable for each department. This is not required and you will still have the ability to create unique emails for each candidate.

Setting Evaluation Criteria

Only those with Administrator or Committee Manager roles will have the ability to set up evaluation criteria for a given search, but they should do so only after consulting with the search committee, search committee chair, or unit leadership as applicable. Applicants will not be able to see the evaluation criteria.

*You may skip this step if your search committee has not yet established its criteria, but criteria must be entered before the search committee begins reviewing applications.*

You can establish custom evaluation criteria for rating applicants on a 5-star scale. This allows Evaluators to rate and compare applicants on criteria such as scholarship, teaching, research, publishing, or whatever criteria you add. The system will calculate the average score of an applicant by both category and overall rating. You can set whether or not Evaluators can view comments and ratings given by other users.
The criteria should include all required (minimum) and desired/preferred qualifications listed in the ad. Criteria may also be built around job duties or expectations of the position. Candidates who do not meet the required (minimum) qualifications may not be hired into the position.

**Entering Evaluation Criteria**

Click “Add Criterion”

Type in the evaluation criterion and click “Save”. The text field allows for several dozen characters, so you can be detailed (e.g. “Demonstrated commitment to public affairs, public policy, or the nonprofit sector”). Evaluators will be prompted to assign a rating of one to five stars for each criteria.

If different criteria are used at different stages of the search (e.g., criteria for initial review, criteria for interviews), the search committee/search committee chair/unit leadership should outline which criteria apply to which stages so the Administrator can enter them in the appropriate order.

Administrators can also add later-stage criteria when the search reaches that particular stage.
Blind Review

Units have the option of setting the search for ‘blind review’ which means an evaluator will only be able to see ratings they assign and not ratings assigned by other evaluators. Check the Blind Review box to enable this feature. Click Save & Continue.

Attaching Custom Forms

FS allows units to create custom forms to gather additional information from applicants. Additional forms can be created specific to the search, department, or college. To select from a list of forms your unit/college already has available, click Add Form, select the desired form from the drop down menu, and click Save. You can click Preview to see how the form will appear to applicants. When you are finished adding forms to your search, click Save & Continue. Administrators and Committee Managers can create forms for the units they administer and forms can be specific to any institution, college, department or position.

Note: Application forms are attached during the process of creating or editing a position, but forms are created from the Administration page.
Click “Add Form”

Select form from the dropdown list and click "Save". A list of forms that have already been created (from the Administration page) will appear in the dropdown list.

**Texas A&M University Required Forms**

Texas A&M University has already created and populated an EEO, Veteran Status, and Foster Child form. You MUST check the “Applicants must complete an Equal Employment Opportunity Form” above and select the TAMU EEO form. The other two forms will be automatically be appended to your position and included in the application process for every applicant. There is no action required from department or college and these forms cannot be changed or deleted.

**Setting up the Search Committee**

To extend Evaluator access to personnel who will serve on your search committee, those individuals must be added to the search in FS. Click Add Member to view TAMU personnel already loaded in as FS users. You can search by name, unit, or email, or use the search field to enter a keyword. Once you locate the person you are looking for, click Add. Repeat this process until you have added all search committee members. A search committee must be made up of more than one person. Search committee chairs or committee managers must have taken Search Committee Training or STRIDE training within the past two years to be able to chair a search.

The Search Committee must be complete in order for the Office of the Dean of Faculties to approve the position.

The “skip step” is an option to allow you to fill out additional sections prior to entering the search committee, but you will be required to go back and return to this step. Again, the Search Committee must be complete in order for the Office of the Dean of Faculties to approve the position.
To remove a search committee member, simply click the X. Otherwise, click Save & Continue. If you don’t see the individual you are looking for on the User list, you have the ability to add them.

Click "Add Manager" to call up a list of available Committee Managers for your committee.

Click "Add" to add the user as manager for the committee.

This list displays users who have been assigned the role of Committee Manager for the unit in which you are creating the position. If you don't see the user you are looking for you may need to assign the user the role of Committee Manager for the unit in which you are creating the position.

Keep adding members and/or managers until you have your committee assembled, and click "Save & Continue". Please note that a committee manager is not required.
Internal Notes

This section replaces the Authorization to Recruit or Waiver of Search memo. It will never be seen by applicants, but is visible to anyone on the search with Evaluator, Committee Manager, or Administrator FS roles, as well as anyone on the approval chain.

TAMU will use this section to collect important information about your search goals. Although many fields in the section are optional, we require the following fields be completed as articulated below.

1. **Position ID or Requisition Number (REQUIRED):** This would be 2 Digit Academic Year-Interfolio Position ID#-# of Positions-Track (20-XXXX-02-TT) or (19-XXXX-8-APT)

2. **Rank: (Optional)** Rank is defined as Lecturer, Assistant, Associate Professor, or Professor. For example, if you are hiring for an Instructional Associate Professor, the rank would be Associate Professor, but the title would be Instructional Associate Professor. If position is open rank, list all that are being considered (i.e. Assistant/Associate/Professor).

3. **Title: (Optional)** This is the true faculty title and would include any adjective/modifier. If position is open rank, list all that are being considered.

4. **Discipline (Optional):** Please reference the department and discipline specific to the position.

5. **Position Term Length (REQUIRED):** Indicate the number of months the appointment term is for.

6. **Anticipated Start Date (REQUIRED):** Please indicate the anticipated start date here. Please ensure that this date is a reasonable amount of time from when the create position request is submitted.

7. **Salary Range (REQUIRED):** Enter proposed monthly salary range. You are able to enter “Commensurate with experience” in this box. It does not require a dollar amount.

8. **Funding Source (Optional):** Optional; enter if known.

9. **Hiring Plan (REQUIRED):** In this section, units must provide a list of outlets (e.g., journals, listservs, job boards) where you will post your job advertisement. You are welcome to post in additional outlets beyond what you list here, but you will be expected to post in any outlets listed in this section. Please articulate your good faith efforts to recruit underrepresented demographics. Additionally, an outline of the search process to be used specifying which methods or strategies will be used to identify and develop a diverse pool of applicants is required here per University Rule: 12.99.99.M1.

10. **General Notes (REQUIRED):** This is where you will indicate your justification on why the position is being requested and what need it is fulfilling. How will it contribute to and enhance departmental and institutional teaching, research, and service? This is also the appropriate box to enter your waiver justification. A waiver justification must include the individual’s qualifications and credentials. Additionally, a CV would need to be uploaded for a waiver of search in this section.
**Required Format for Waivers:**

**WAIVER JUSTIFICATION:** Enter Justification Paragraph
The justification should include the compelling business reason/need as well as the individual’s credentials and qualifications. Additionally, it will need to be clearly defined if the waiver is an internal or external waiver.

11. **File Attachments:** Upload documentation for your committee to access. This may include items like hiring best practices or committee notes.

Once you have completed the steps to Create a Position, a Review screen will pop up that includes all the information entered during the Create a Position process. Before clicking the Submit for Approval button, check through all the sections to make sure they are complete and content is compliant.

If you skipped entering the search committee or evaluation criteria, remember to edit the position and add that information before applicant screening begins. Academic Personnel will not hold up your posting if these sections are incomplete, but the hire into Workday will not be approved until all information is accounted for.

If you are confident the position and search information is correct, click Submit for Approval. The information you entered throughout the Create a Position process will be routed to a chain of approvers predetermined by the Position Type you selected early on in the process. All FS searches at TAMU must be approved by the Dean of Faculties prior to internal and external posting.

An email will be sent to the approvers notifying them a position requires their approval. Units may continue to edit and prepare the position while awaiting approval. You will receive a notification once your position is approved or if changes need to be made to the position.
Revising the Position during the Approval Process

Should approvers require or suggest changes to your position, you will receive an email notification with the required/requested change and directions on next steps.

Once you have revised your position, you will need to resubmit your position for approval. You will receive a notification once it is approved and you are authorized to proceed with your search.

Reviewing and Publishing the Position

Open/Publish the Position (Done by Department Administrator)

Once you get notification that your position is approved by the Dean of Faculties Office, you are ready to complete the final steps to open your position. In order for applicants to apply, the position must be published to the TAMU Faculty Job Board and its status set to accept applications.

Click the blue “Position Actions” button and select “edit position.”

The approved position will be automatically published and ‘live’ when you reach the Position Opens date entered earlier in the Create a Position process and it has been approved. If your position gets approved well in advance of the Position Opens date, you can manually publish it by selecting the change option indicated below or edit the Position Opens date by selecting the Description & Dates link from side menu.

When a position is published, a unique URL will appear in the bottom left corner of the window as indicated above. You must copy/paste this URL into the advertisement copy you use when posting on external sites (e.g., journals, job boards, etc.) and direct applicants to follow the URL to apply for the position. If the URL is not included in an ad, applicants will have no way to apply for the position.
If you want to prep your external ads in advance in order to have them ready to post as soon as your position is approved, you can also retrieve the unique URL by going to the Positions home page, selecting your position, clicking on the Position Actions menu in the top left corner, and selecting “View Position Details”.

**Set Initial Status (Done by Department Administrator)**

Click the Update Status button and select “Accepting Applications” from the drop down menu. The default permissions related to this status and other statuses used later in the search have been set by TAMU and cannot be changed.

You will need to set an initial status for the position (such as "Accepting Applications") and update accordingly throughout the search process.

**Possible Position Statuses:**
- Accepting Applications
- Reviewing Applications
- Interviewing Finalists
- Position Filled
- Waiver

After making desired adjustments, click Save.
Position Announcement

After you create a position and the position has passed its open date, or you have manually published it, FS generates a landing page announcing the position. The URL directs applicants to this landing page where they will start the application submission process.

Understanding the Applicant View

It may be useful to familiarize yourself with the process from an applicant’s point of view. Please review Job Applicant’s Guide to Interfolio Faculty Search (on DOF website) for more information on the applicant experience.

Running a Search

A common search strategy is to conduct a “two-stage” or multi-stage search in which the applicant field is narrowed down, and additional materials are requested from a select group of applicants.

For instance, let’s say you have a search with 100 applicants. After a first review, your committee narrows the list down to just 20 applicants. From those 20 applicants, the committee needs to request three additional confidential letters of recommendation. This means you will need to update the document requirements for the position; however, you don’t want to notify your rejected applicants of any changes in the position (such as updated requirements) until after a hire has been made.

So, how do you add additional requirements to a position that will only notify your shortlist of applicants?

Simple: you implement a two-stage search by following the steps below. You can customize your workflow to be more than two stages with additional statuses and tags.
• Use the possible application statuses below to divide your applicants into different categories
  a. Not Considered
  b. Longlist
  c. Shortlist
  d. Interview
  e. Offer Pending
  f. Hired
• Select the shortlisted applicants from the list on the Applicant List of the position.
• Archive applicants that are not moving forward
  a. Filter the list to display applicants with an application status indicating they have not been

selected to move to the second stage of the search.
• Click the "More Options" icon to the top right of the list, and select "Archive" from the dropdown menu.
  a. Archiving an applicant does not delete their application. This will simply move them to another
     folder and “freeze” the applicant’s view and what s/he is permitted to do within the system.
     Archived applicants will not be notified of any updates to the position's document requirements.
     Although if the applicant opens the application they will be able to see newly added
     requirements.
• Edit the position to add the additional required documents you need from applicants on your shortlist
  a. When shortlisted applicants sign into their account, they will see additional requirements for the
     position and be able to add additional materials or request additional letters of recommendation
     for this search.
b. When archived applicants sign into their account, they will not be able to update their application unless the specifically open and enter their submitted application.

- Click the "Position Actions" button to edit the position
- Select "Edit Position" from drop down menu, and then select "Required Documents" from the list of steps to the right of the page
- Click "Add Requirement"
- Select the document type, number required, and add any necessary notes about the new requirement
- Notify shortlisted applicants that they must add additional documents to their application
  a. You will need to notify your shortlisted applicants that they must add additional documents to their application.
- Filter the list to display only shortlisted applicants
- Select all applicants in the filtered list
- Email all selected applicants
  a. To see all emails sent from the application, click reports, click logs, then click system logs and select messages sent.
Assigning disposition codes to applicants:

Select the applicant from the list of applications. Click “Add” under the disposition code section of the applicant’s profile page. Select the appropriate disposition code from the drop down list.
Assign disposition codes to multiple applicants:

Select multiple applications on the applications page as shown below. This will open a menu bar that includes a "Disposition Codes" button.

Click "Disposition Codes" and select the code you want to apply. The code will display on the applicant profile page of each user.

Ready to Hire

Once you have selected the candidate you wish to hire from your shortlist, you are ready to change their status to Hired.

- Use the possible application statuses below to divide your applicants into different categories
  a. Not Considered
  b. Longlist
  c. Shortlist
  d. Interview
  e. Offer Pending
  f. Hired
Once the candidate has the status of “Hired” you are ready to begin the Hire ID in the DOF Hiring Workflow. You will need to reference the Position ID# assigned in Interfolio.

Login to the DOF Hiring Workflow at [http://dofportal.tamu.edu](http://dofportal.tamu.edu) and select Hiring Workflow. From here, select Interfolio.

You should now be able to see all positions where a candidate was marked as hired in Interfolio for your department. The Position ID# is listed for you to reference the correct position.

From this view, you will be able to see how many applications there were for the position, the current position status, the number of positions requested, and how many Hire ID’s have been started. You will not be able to edit these fields.

When you click the Position ID number, the applicants will display below the list of open positions on the page. From here, you will be able to “Start Hire” to begin the Hire ID.

This is linked to the position track you selected from the “Create Position” step in Interfolio. You will not be able to edit the position type after a position has been created. From here, you will input the required documents for the Hire ID and route for approval.
The Office of the Dean of Faculties will update the number of positions in the portal based on the number of positions requested in the Interfolio position request.

Search Waivers

Please refer to the Faculty Hiring Guidelines for the waiver requirements. A search waiver will be processed very similar to a regular authorization to recruit. In the “Internal Notes” section, you will need to add a “W” to the end of the Position ID or Requisition Number. This would be 2 Digit Academic Year-Interfolio Position ID#-# of Positions-Track (20-XXXX-01-TTW) or (19-XXXX-1-NTTW). Additionally, in the internal notes, under the “General Notes” section, you will enter the waiver justification. This must be detailed and include the extenuating circumstance as to why the waiver is being requested. The justification should include the compelling business reason/need as well as the individual’s credentials and qualifications. Additionally, it will need to be clearly defined if the waiver is an internal or external waiver. Please note a CV would need to be uploaded for a waiver of search in the “Internal Notes” section.

Once the “Create Position” has been approved by the Office of the Dean of Faculties, you will change the “Position Type” to Waiver.

If the search waiver is external, it is required to be posted for five calendar days to TWC. In this instance, you would ensure the “Apply Now” page is published and the position kept open for the five calendar days. After the five calendar days has passed, you will un-publish the “Apply Now” page. From here, the department administrator will be able to enter the faculty member as an “applicant” and then disposition to “Hired”. Once entered and it has been open for the appropriate period of time, you will close the position. This will further populate the DOF Hiring Portal to begin the Hire ID.

If the search waiver is internal, the posting is waived. In this instance, you would ensure the “Apply Now” page is not published with the position still open, upon DOF approval. From here, the department administrator will be able to enter the faculty member as an “applicant” and then disposition to “Hired”. Once entered, close the position. This will further populate the DOF Hiring Portal to begin the Hire ID.

There are times when the search committee identifies more than one viable candidate for a single position advertised. In these cases the question that arises is whether or not the hiring department can hire more than one candidate when it only advertised for one position. In this instance, you are able to submit an internal waiver for the justified applicant. In the waiver justification section under “Internal Notes”, you must detail all the requirements in the hiring guidelines as well as identify the Interfolio search ID number.

Additional Resources

The pdfs below are on the Dean of Faculties Website.

- Job Applicant Guide to Faculty Search
- Evaluating Applicants
- Evaluator Guide to Faculty Search
- Managing Applicants
- Managing a Position