
INTERFOLIO FACULTY SEARCH

User Guide

Submitting an Applicant for Approval to Hire

Approving a Selection

Sending a Selection Back

JULY 9, 2020
BAYLOR UNIVERSITY

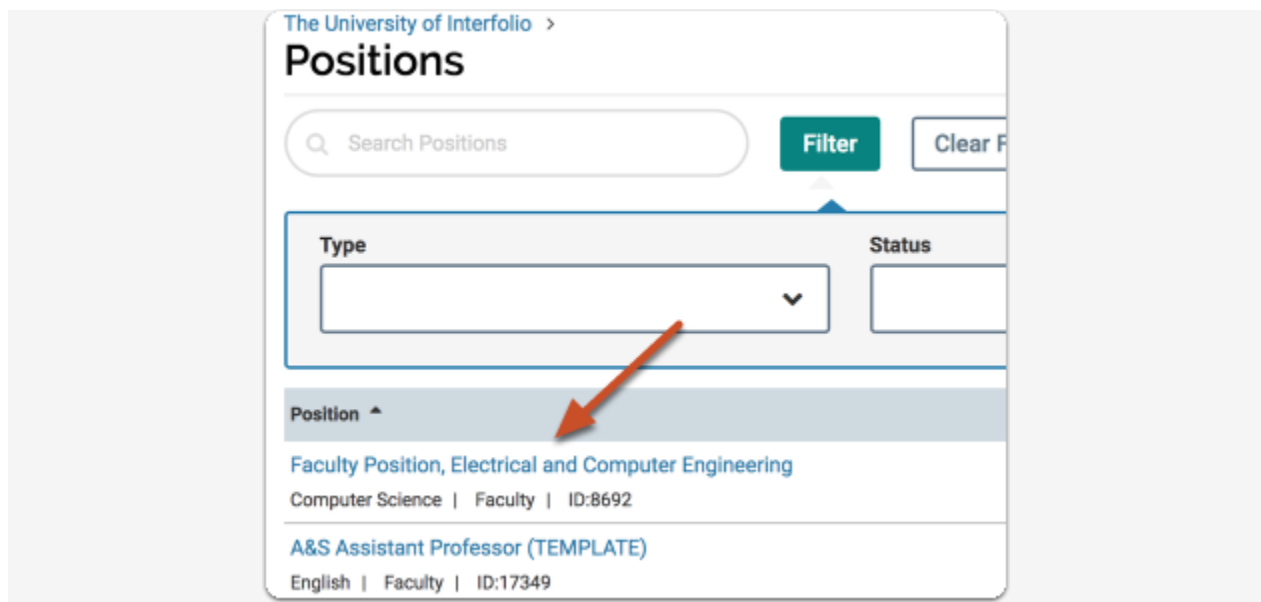
Submitting an Applicant for Approval to Hire

At the end of a search, committee managers and administrators can close a position and indicate whether or not they have selected one or more applicants to fill the position.

Baylor has established a workflow for approving selections. You will need to submit your selections for approval in order to ensure that all academic hires follow Baylor's policies regarding faculty hires.

The steps below describe the process of closing a position and submitting selected applicants for approval

Navigate to the position you want to close



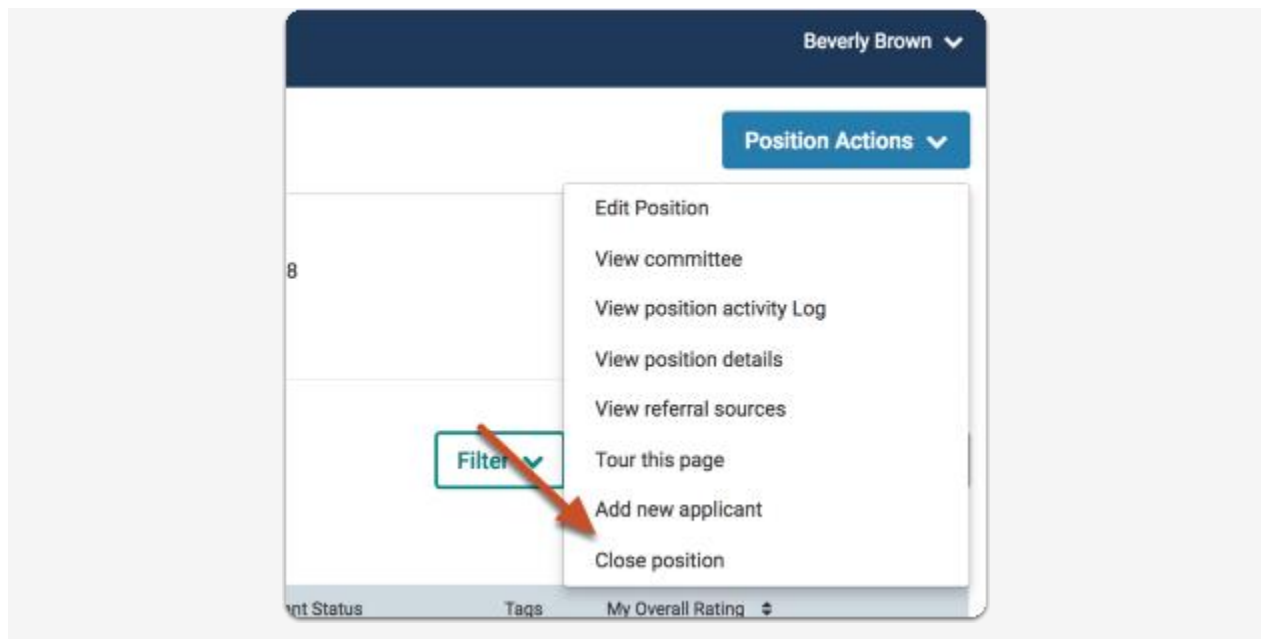
Select the position by clicking on the link as identified above.

Add and/or Verify required documents have been added

Select the name of the Applicant(s) you plan hire. Scroll down to internal documents. Select Add file and attach the following documents:

1. Hiring Proposal Document (attach post-interview)
2. Faculty Certification of Credentials form (Found on the provost's website) (attach pre- interview)
3. Religious Affiliation Form (Found on the provost's website) (attach post-interview – Rachel DeShong will handle this attachment)
4. Certified Transcript (attach post-interview)
5. Other(s) (If applicable) – Example: Justification for Endowed Chairholder Status

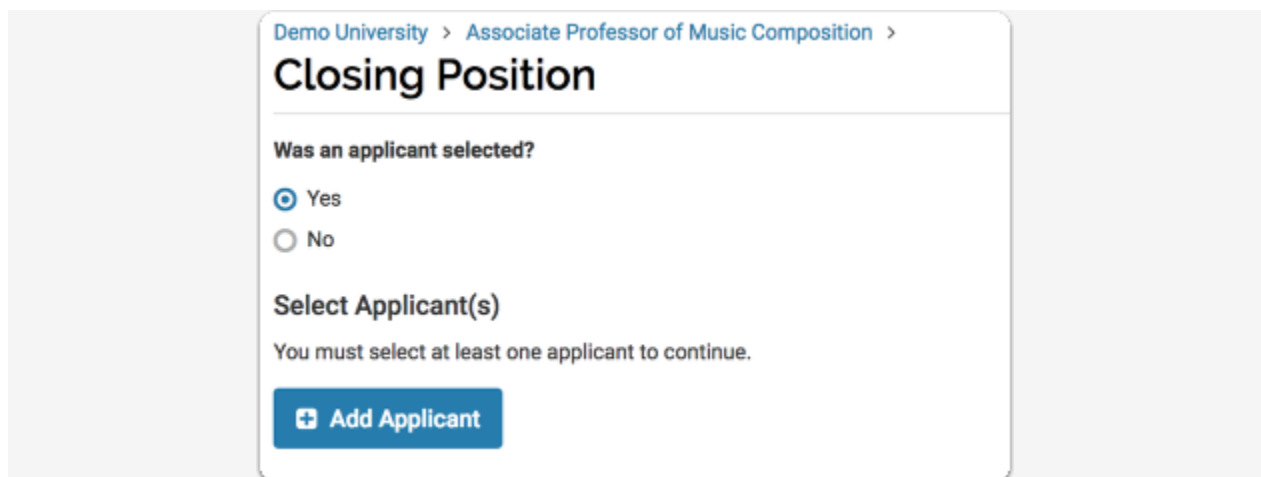
Once required internal documents have been attached, Click "Close Position" under the "Position Actions" menu at the top right of the screen



If you have identified an applicant to hire, select "Yes".

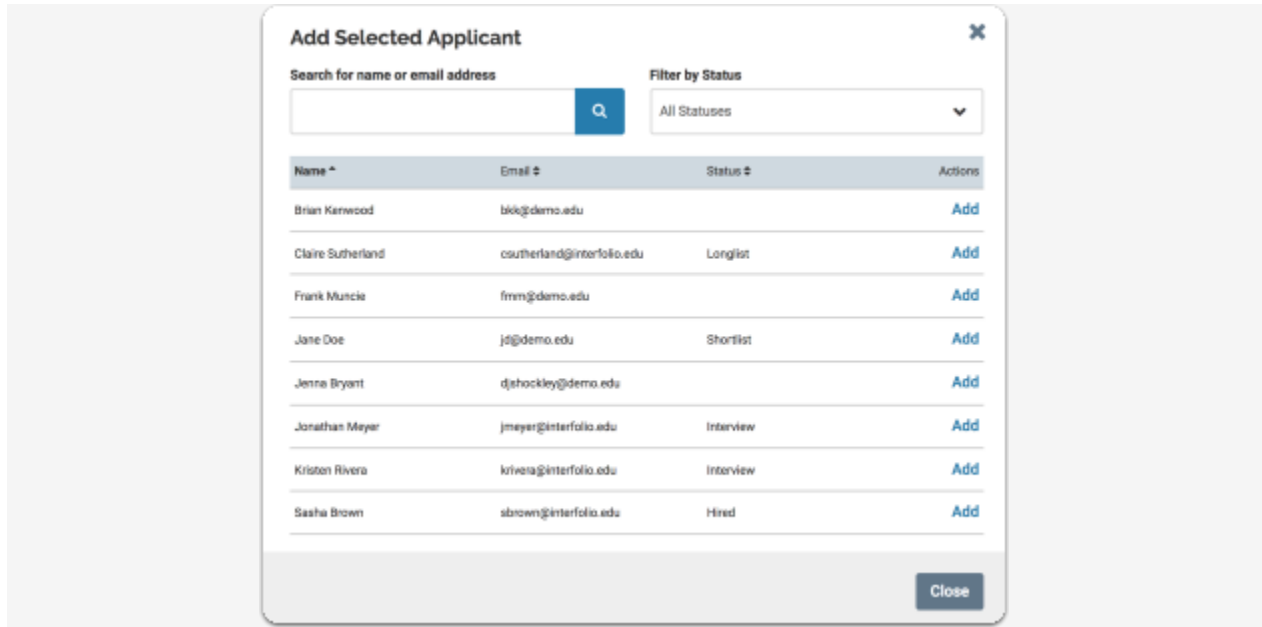
If one or more applicants was selected to fill the position, click "Add Applicant"

If you indicated a selection was made, you must select at least one applicant to continue.

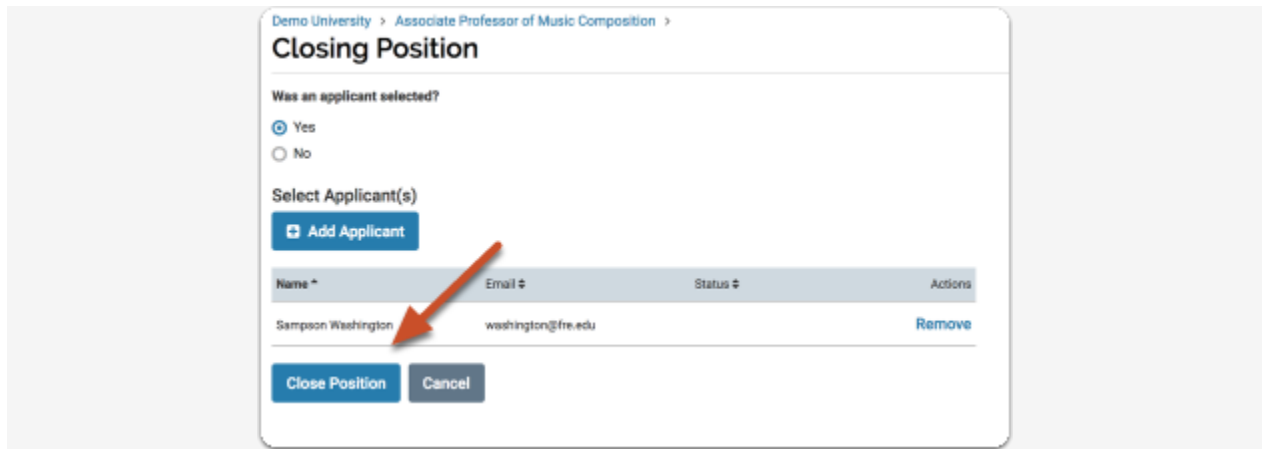


A list of available applicants will appear in a window. Find the name of the applicant(s) you want to hire and click "Add".

You can sort the list of applicants by name, email, and status. You can also search the list by name or email address and filter the list by status.



Once you have selected the applicant(s), Click "Close Position" to send and submit the selected applicants for approval through the established workflow.



This opens a page that lists the approver(s) for the selection.

Send Selection for Approval

Your institution has defined steps for review of the selected applicant(s) in order for the position to be closed. The approver(s) displayed below will receive a message asking them to review the position. You will receive an email once the position has been approved by all approvers. [View all approval steps](#)

Position
English Adjunct

Send To
Step 1 of 2: Selection 1

Personalize Message
 Include a personal message to the members receiving access.

Send **Cancel** **Preview**

The approver(s) displayed will receive an email indicating that a selection has been made and is awaiting their approval.

You can personalize this email with a message to the approver.

If you do not include a message, you must unclick the personalize message box or you will not be able to send the approval to the next step in the workflow.

Send Selection for Approval

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Position
Associate Professor of Urban and Environmental Planning

Send To
Step 1 of 2: Department Chair

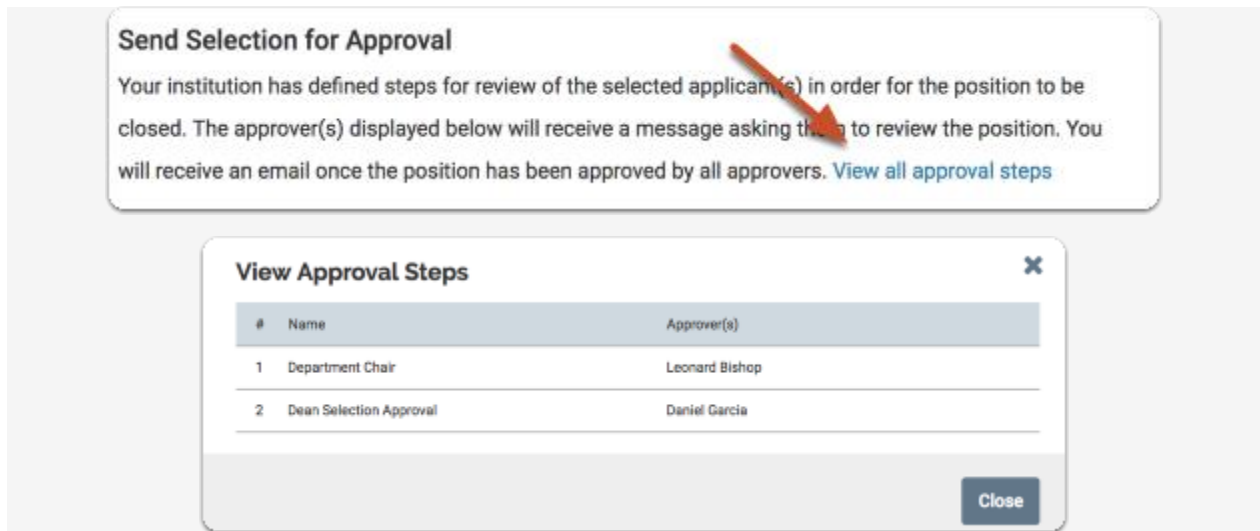
Personalize Message
 Include a personal message to the members receiving access.

From Name **Reply to email address**
Beverly Brown blothar.brown@interfolio.com

Subject *

Message *

Note that you can click a link to view all the selection approval steps in the process



Send Selection for Approval

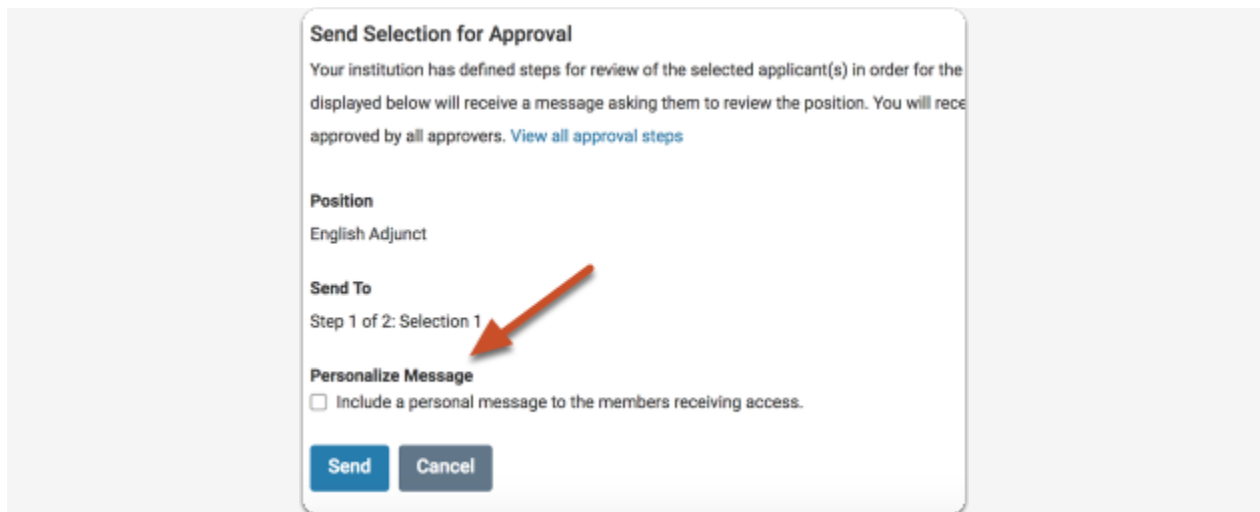
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View Approval Steps

#	Name	Approver(s)
1	Department Chair	Leonard Bishop
2	Dean Selection Approval	Daniel Garcia

Close

Click "Send" when you are ready to submit the selection for approval



Send Selection for Approval

Your institution has defined steps for review of the selected applicant(s) in order for the position to be closed. The approver(s) displayed below will receive a message asking them to review the position. You will receive an email once the position has been approved by all approvers. [View all approval steps](#)

Position
English Adjunct

Send To
Step 1 of 2: Selection 1

Personalize Message
 Include a personal message to the members receiving access.

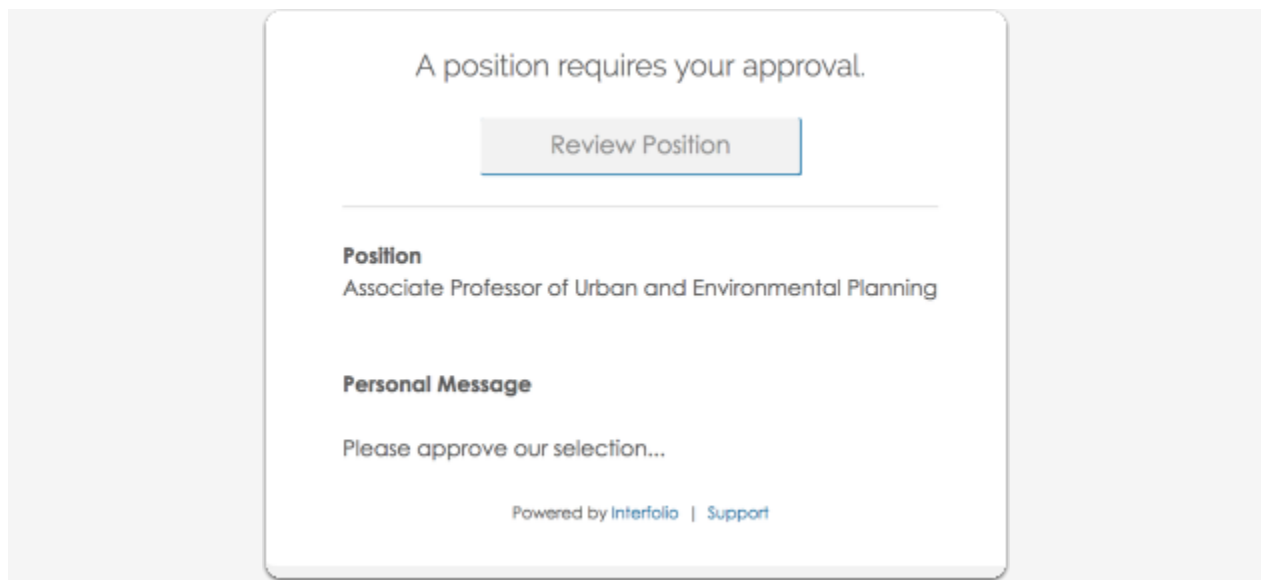
Send Cancel

Approving or Sending Back a Selection for Hire

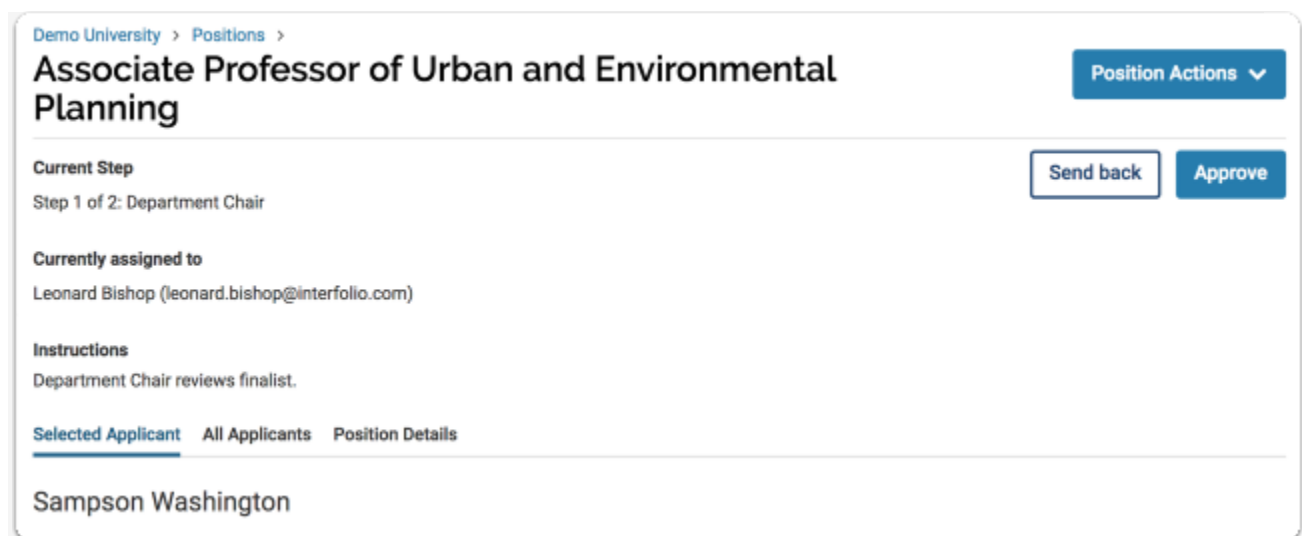
This section explains the process of approving or sending back the workflow related to hiring an applicant that has been selected. If you are an administrator who is assigned to the workflow process, follow the instructions below to approve or send back the hiring selection.

Approving an applicant selected for hire

If you are assigned to approve selections, you will receive an email like the one below notifying you that a position (selection) requires your approval.



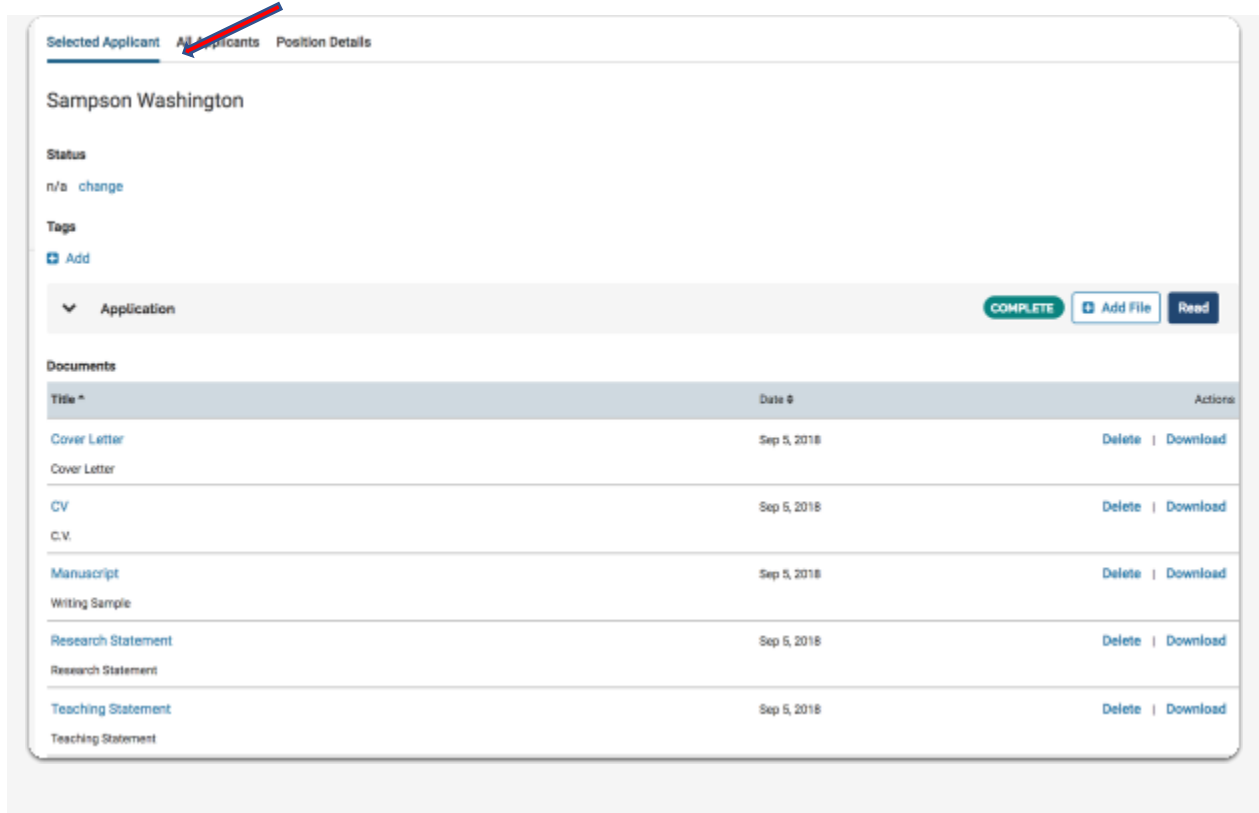
Clicking "Review Position" opens the selection approval page that displays the current step, who the step is assigned to, and instructions for the approval.



Scroll down to the tabbed section of the page. The "Selected Applicant" tab displays the selected applicant's information and application materials. Scroll down to the "internal documents" section to review the hiring proposal and other required documents.

REQUIRED DOCUMENTS that should be attached and reviewed in the "internal documents" section before the applicant approval is sent through to the next step in the process. Documents are as follows:

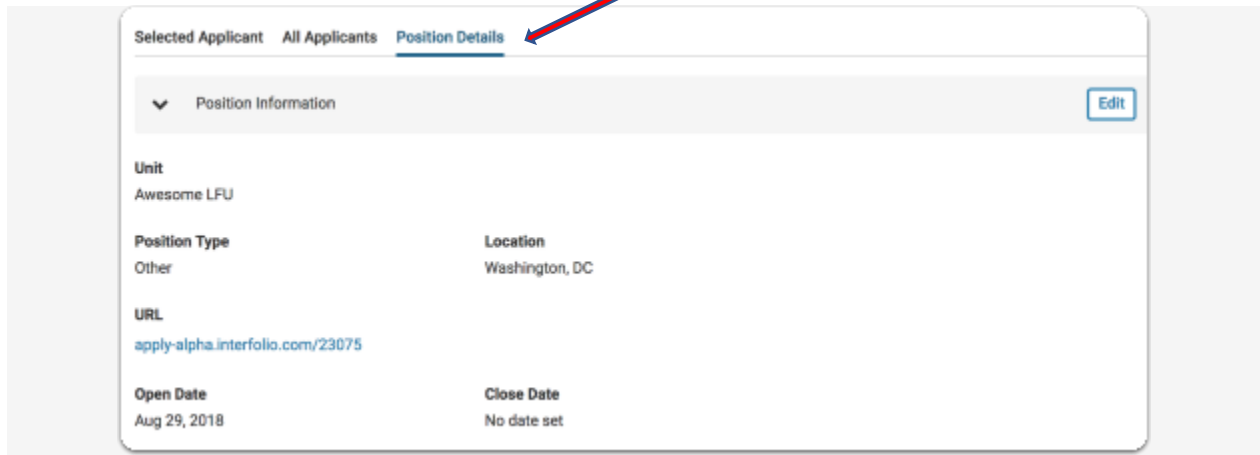
1. Hiring Proposal Document (attach post-interview)
2. Faculty Certification of Credentials form (Found on the provost's website) (attach pre- interview)
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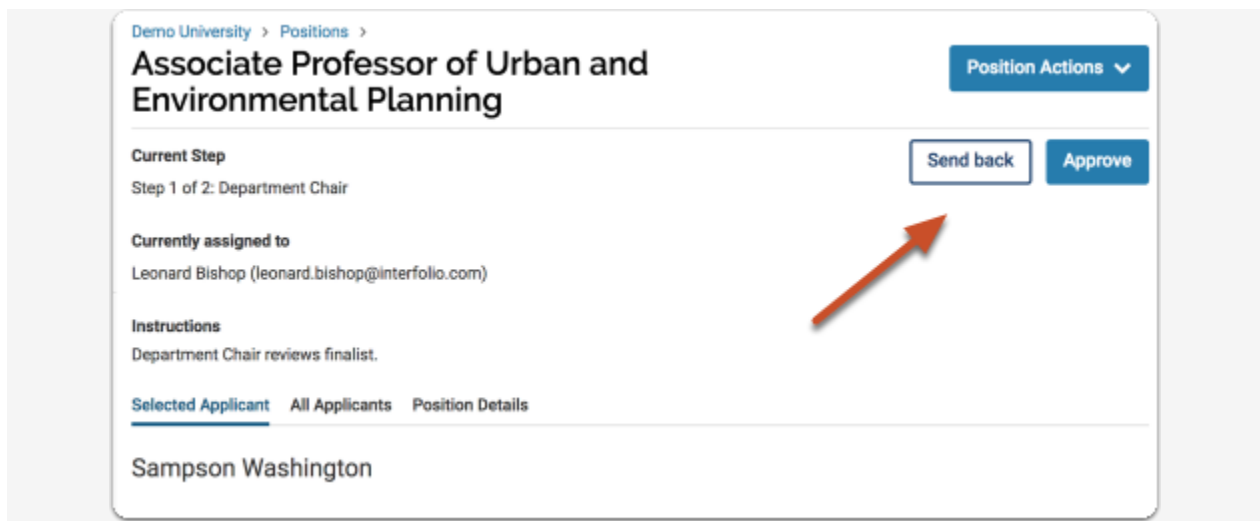
The screenshot shows a web interface for managing applicants. At the top, there are three tabs: "Selected Applicant" (which is active and highlighted with a red arrow), "All Applicants", and "Position Details". Below the tabs, the name "Sampson Washington" is displayed. Underneath, there is a "Status" section with the value "n/a" and a "change" link. A "Tags" section has an "Add" button. Below that is an "Application" section with a dropdown arrow, a "COMPLETE" status indicator, and "Add File" and "Read" buttons. The main part of the page is a "Documents" section containing a table with columns for "Title", "Date", and "Actions".

Title *	Date	Actions
Cover Letter Cover Letter	Sep 5, 2018	Delete Download
CV C.V.	Sep 5, 2018	Delete Download
Manuscript Writing Sample	Sep 5, 2018	Delete Download
Research Statement Research Statement	Sep 5, 2018	Delete Download
Teaching Statement Teaching Statement	Sep 5, 2018	Delete Download

Note that the "Position Details" tab displays basic position information.



Once the documents have been reviewed, Click "Approve" to send the hiring recommendation through to the next step in the workflow.



You can personalize the email that will be sent alerting approver(s) at the next step in the workflow that a selection requires approval.

The screenshot shows a web form titled "Approve Position" for "Demo University > Associate Professor of Urban and Environmental Planning". The form includes the following sections:

- Position:** Associate Professor of Urban and Environmental Planning
- Send To:** Step 2 of 2: Dean Selection Approval
- Personalize Message:** A checked checkbox labeled "Include a personal message to the members receiving access."
- From Name:** Leonard Bishop
- Reply to email address:** xxmiserybrothers@gmail.com
- Subject *:** A text input field containing "New Hire: Associate Professor of Urban and Environmental Planning".
- Message *:** A rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, link, unlink, image, and a text color picker.

If the position is at the final step in the approval process, click "Close" to approve and close the position

The screenshot shows the "Associate Professor of Urban and Environmental Planning" position page in a web application. The page includes the following elements:

- Position Title:** Associate Professor of Urban and Environmental Planning
- Current Step:** Step 2 of 2: Dean Selection Approval
- Currently assigned to:** Daniel Garcia (daniel.garcia@interfolio.edu)
- Instructions:** Dean checks budget for projected hire date and approves the selection.
- Navigation:** "Selected Applicant" (underlined), "All Applicants", and "Position Details" links.
- Selected Applicant:** Sampson Washington
- Position Actions:** A dropdown menu containing "Send back" and "Close" buttons. An orange arrow points to the "Close" button.

Sending Back a Position

If a selection is not approved, click “Send Back” to return the hiring selection back to an earlier step for correction or changes.

Note: With **POSITION approval**, you can send your position back to a previous step in the workflow and when it's resolved, it will return to the step that sent it back.

For **HIRING SELECTION approval**, when you send your position to a previous step in the workflow, it will need to go through all the steps in the built-out workflow.

For example, if your selection was sent from step 3 of the process to step 1, the selection will have to go back through steps 1, 2, and 3.



Demo University > Positions >

Associate Professor of Urban and Environmental Planning

Position Actions ▾

Current Step
Step 2 of 2: Dean Selection Approval

Currently assigned to
Daniel Garcia (daniel.garcia@interfolio.edu)

Instructions
Dean checks budget for projected hire date and approves the selection.

[Selected Applicant](#) [All Applicants](#) [Position Details](#)

[Send back](#) [Close](#)

Indicate the step you are sending the position to and personalize the message that will alert approvers at that step.



The screenshot shows a web form titled "Send Back" within a breadcrumb trail: "Demo University > Associate Professor of Urban and Environmental Planning >". The form fields are as follows:

- Position:** Associate Professor of Urban and Environmental Planning
- Send To ***: A dropdown menu with "Associate Professor of Urban and Environmental Planning" selected. A red arrow points to this dropdown.
- Personalize Message:** A checked checkbox labeled "Include a personal message to the members receiving access."
- From Name:** Daniel Garcia
- Reply to email address:** xxdaniel.garcia@interfolio.edu
- Subject *:** An empty text input field.

Approvers at that step will receive an email indicating that a position requires their attention

