

# Interfolio Faculty Search Guide for Administrators

Quick Resources:

[Creating and Managing Positions](#)

[Creating and Managing Applicants](#)

[Evaluating Applications](#)

## Signing into Interfolio:

The sign in page can be found here: <https://account.interfolio.com/login>

**\*Please be sure to “sign in with partner institution”.**

**Sign In**

Sign in with email

Email \*

Password \*

Sign In

[Forgot your password?](#)

Other Sign In Options

Sign in with Partner Institution

**Search for and select Case Western Reserve University.**

If your institution has partnered with Interfolio to provide Single Sign-On, search for your institution name in the box below.

Case Western

Case Western Reserve University

Case Western Reserve University-College of Arts and Sciences

Once you select “Case Western Reserve University” you should be prompted to sign on through Single Sign On using your Case ID and Password. If you experience an error when trying to login, please contact [SOMInterfolioSupport@case.edu](mailto:SOMInterfolioSupport@case.edu)

## Creating a position:

In order to route for approval, the department administrator must create the position listing in Interfolio. This includes submitting the position description, qualifications, application instructions (including applicant-required documents), evaluation criteria, search committee members, **and attaching the forms listed below.**

- A. [Request to Initiate Faculty Search for Full-Time Faculty Form](#): This form includes pertinent information such as the title and rank of the requested position, description of responsibilities, salary and funding information, the search committee chair(s), justification for the position, and how the hire will contribute to the department's commitment to diversity. *There can only be ONE hire per SOM faculty search number. Please submit multiple search forms if the department wishes to hire for multiple positions for the same listing.*
- B. **Forms 1+2 for OIDEO**: These forms can be found at the top of [OIDEO’s Forms and Downloads Page](#)

1. To create a new position, go to the “Positions” page along the left side of the home screen then click “New Position”.

Case Western Reserve University >

# Positions

Search for positions

test [FILTER]

Position	Status	Application Information	EEO Notes
Lecturer Test Jack, Joseph and Morton Mandel School of Applied Social Sciences   Non-Tenure Track Faculty   ID:111762	Accepting Applications	1 applications Opens: Feb 16, 2023	Add
Open Rank Faculty Test Frances Payne Bolton School of Nursing   Open Rank/Track Faculty   ID:111613	— Waiting For Approval Step 1 of 7: Search Committee	0 applications Opens: Jul 1, 2023	Add
SOM TEST POSITION SCHOOL OF MEDICINE   Open Rank/Track Faculty   ID:111619	—	0 applications Opens: Jul 1, 2026	Add

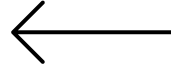
2. When creating a position for faculty **please select “Open Rank/Track Faculty”** as the type and select your department for the unit. This is the only type that will prompt the SOM approval process. All other types will result in the position getting sent back.

## Create Position

Please select information about the position you want to create. You cannot make changes to these fields once the position is created.

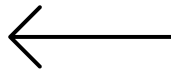
Type \*

Open Rank/Track Faculty



Search For or Select Unit \*

Anatomy



What kind of position would you like to create?

A new position

Clone from an existing position

3. Start filling out the Basic Information section. “Open Date” is the date you would like the position to publish. Please be mindful when choosing your open date since the position will need to go through a five-step approval process before it’s posted.

**\*\*Please note: If the position is approved before the chosen publish date, then the position will automatically be published and viewable to applicants on the publish date. If the position is approved after the chosen publish date, the department administrator must go into Interfolio and publish the position.**

## Basic Information

### Description & Dates

Position Title \*

SOM TEST - Tenured/Tenure Track Associate Professor

Location \*

Cleveland, Ohio

Position Type

Open Rank/Track Faculty

Open Date \*

Jun 30, 2023



#### GENERAL INFORMATION

Start by filling out some general information about the position, including most of the fields required to publish your opening.

4. The *Basic Information* section includes Position Title, Location, Open Date, Deadline selection, Position Description, Qualifications, Application Instructions, and Advertising Setting.


5. Once all basic information is filled out, you can continue to the *Required Documents* section and add all documents you would like applicants to upload. **Please Note: To add an optional document, you must first add it as 1 required. You may then edit the requirement by clicking the pencil and then changing the 1 to 0.**

## Required Documents

SOM TEST - Tenured/Tenure Track Associate Professor

2 Documents Required

Drag and drop the documents in the list below to change the order they will appear in the application requirements.

1	C.V.	 
<input type="text" value="0"/>	Cover Letter	<input type="text"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>

 Add Requirement

### REQUIRED DOCUMENTS

Customize the document requirements for your opening using our list of standard document types. Don't see what you need? Select *Other Document* and enter the details.

6. In the *Evaluation Settings* section, you will need to input the criteria to be used by Search Committee members to evaluate the applicants.


## Evaluation Settings

1 Criteria

Drag and drop the criteria in the list below to change the order they will appear in the application review process.

**Note: at least one criterion must be created in order to rate candidates.**

Test Criteria 

 Add Criterion

### EVALUATION CRITERIA

Create evaluation criteria for your committee to use when evaluating applicants. Common examples include: *Scholarship, Teaching, and Research*. You may wish to add a criterion called *General* or similar if you don't wish to rate specific aspects of the candidate's application.

**Blind Review**

Evaluators should not see others' comments and ratings

 Save & Continue

Skip Step

7. *Application Forms* can be created using the "Administration" tab along the left side of the screen, then clicking "Application Forms". It is recommended to do this before you start creating your position as forms cannot be created at this step, only added to the position. Please only create Application Forms for your department.

The EEO Form was created by OIDEO and is required to include in the position.

# Application Forms

If your institution has a standard application form, it will appear when you click *Add Form*.  
Need to create a new form? Forms can be created through the [administration](#) dashboard.

0 Forms Required

Drag and drop the documents in the list below to change the order they will appear in the document delivery packet.

[+ Add Form](#)

Applicants must complete an Equal Employment Opportunity form

Candidate Affirmative Action Survey

*Note:* EEO responses can be viewed by EEO officers and administrators but not by committee members. EEO forms may be required by institutional or unit administrators.

8. In the *Search Committee* section you will add all search committee members. Please note that training is required to be a search committee member. While the lack of training will not delay the position approval process, members/administrators must work with Karyn Newton separately to obtain training **before interviewing applicants**.

\*Interfolio automatically inputs the position creator as the Committee Manager. You can remove yourself after adding another Manager using the "Add Manager" button.

\*\*If you do not see someone listed when adding members, they likely do not have access. You can request access by sending their name and CWRU ID to [sominterfoliosupport@case.edu](mailto:sominterfoliosupport@case.edu)

## Search Committee

[+ Add Member](#)

[+ Add Manager](#)

1 Committee Members

Mary Elizabeth Spohn

Committee Manager



[✓ Save & Continue](#)

[Skip Step](#)

### COMMITTEE MEMBERS

Add the members of your search committee to grant them access to applicant materials. If the committee hasn't been selected yet, you can always return to this screen by clicking *Edit* from the position overview.

9. The *Position Notes* section is private (seen by only CWRU users) and will never be seen by applicants. **The “Position ID” will be used by OIDEO. Please do not add anything to this text box.**

## Position Notes

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Any information entered on this screen remains private to users at your institution and will never be seen by applicants.

**Position ID or Requisition Number**

**Appointment Type**

**Rank**

e.g., Associate Professor, Lecturer

**Title**

e.g., Visiting, Clinical, Research

The Position Notes section includes Position ID, Appointment Type, Rank, Title, Discipline, Position Term Length, Anticipated Start Date, Salary Range, Funding source, Hiring Plan, and General Notes. **It is not required to complete all of these boxes; however, you must attach the Request to Initiate Faculty Search for Full Time Faculty Form and OIDEO forms 1 and 2. If these forms are not attached, the position will be sent back to the Administrator for revision.**

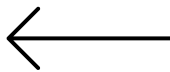
**General Notes**

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, bulleted list, numbered list, indent, outdent, link, unlink, insert image, and link.

**File Attachments**

Upload documentation for your committee to access. This may include items like hiring best practices or committee notes.

[+ Add File](#)



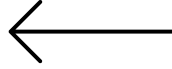
10. After completing the *Position Notes* section, you will view the *Position Summary*. Please ensure that all information is correct and then “Submit for Approval”.

## Position Summary



This position is in the process of being created and will need to be approved before it is open to receive applications.

Submit for Approval



## Position Details

### Basic Information [Edit](#)

#### Description & Dates

Unit

Anatomy

Position Type

### Approval process overview:

Once you’ve created your position and submit for approval, it will follow the process below.

#### Step Name

☰ Faculty Affairs Initial Review

☰ Research Approval

☰ Finance Approval

☰ OIDEO Approval (Forms 1 & 2)

☰ Faculty Affairs Final Approval

**1. FA Initial review** - is the information complete and is the current form being used

**2. Research Approval** - how does the hire align with the department's strategic plan

**3. Finance approval** - based on OPR codes/percentage and for the duration of the faculty term

**4. OIDEO** - will require meeting with Heather Burton and the chair of the search committee before approval

**5. FA Final Approval** - Confirm Provost approval by ECC

\*\*After the position has been approved, Interfolio will notify the creator of the position via email.

**Please note: If the position is approved before the chosen publish date**, then the position will automatically be published and viewable to applicants on the publish date. **If the position is approved after the chosen publish date**, the department administrator must go into Interfolio and publish the position.

## Additional OIDEO Instructions:

STEP 1: Upload **Forms 1 & 2** and the **job description** into the [Position Notes](#) section of Interfolio. This should be uploaded upon creating the position.

STEP 2: **Form 3B** should be uploaded into the [Position Notes](#) section when the department/school is ready for initial interviews.

STEP 3: An **updated Form 3B** should be uploaded into the [Position Notes](#) section when the department/school is ready for finalist interviews.

STEP 4: An **updated Form 3B** and **completed Form 3C** should be uploaded into the [Position Notes](#) section when the department/school is ready to make an offer.

STEP 5: An **Affirmative Action approval letter** will be uploaded to the [Position Notes](#) section.

**OIDEO forms can be found at:** <https://case.edu/diversity/faculty-and-institutional-diversity/faculty-search-process/forms-and-downloads>

## Additional Resources for Faculty Searches:

- [Guidance on Writing a Job Advertisement](#)
- [Information Regarding OIDEO Search Training and Contact Information](#)
- [Creating and Managing Positions](#)
- [Creating and Managing Applicants](#)
- [Evaluating Applications](#)
- If you have questions regarding the faculty search process, please reach out to [somFacultySearch@case.edu](mailto:somFacultySearch@case.edu).
- For access issues, training, and questions on policies or procedures regarding Interfolio, please reach out to [sominterfoliosupport@case.edu](mailto:sominterfoliosupport@case.edu)
- If you have questions regarding technical issues with the Interfolio platform, please reach out to [help@interfolio.com](mailto:help@interfolio.com).
- If you have questions regarding the OIDEO search forms (1, 2, 3B), please reach out to [karyn.newton@case.edu](mailto:karyn.newton@case.edu)



## Looking Ahead:

### **Offer Letters:**

Once a candidate is identified, the department should draft an offer letter (in Word format) and email it to [cynthia.kim@case.edu](mailto:cynthia.kim@case.edu), along with the Position ID, candidate's CV, and the SOM Faculty Recruitment Startup Calculation Spreadsheet (if applicable). The letter will then be routed for approval by SOM senior administration, the Dean, and the Provost. A final draft of the letter will be emailed back to the department for review before it is sent out to the candidate for signature via DocuSign. If you have questions regarding the offer letter process or require an offer letter template, please reach out to [cynthia.kim@case.edu](mailto:cynthia.kim@case.edu).

### **Faculty Appointments:**

Once an offer letter has been signed. Department Administrators should submit a New Appointment packet to the Office of Faculty Affairs. Checklists detailing the information needed in the New Appointment packet can be found on the [Forms and Additional Information webpage](#). Please submit all packets to [somFacultyApptMaterials@case.edu](mailto:somFacultyApptMaterials@case.edu). For questions regarding the faculty appointment process, please reach out to [FacAffrs@case.edu](mailto:FacAffrs@case.edu).