GRADUATE PROGRAM APPLICATION

ADMIN GUIDE

SAN DIEGO STATE
UNIVERSITY

Table of Contents

1.1 Getting Started: Logging In

1. Go to **account.interfolio.com/sso** **(bookmark link)**

2. Select 'San Diego State University - Graduate' and click 'Sign In'

3. Use your **SDSUid** (eg jsmith@sdsu.edu) and password to sign in.

If you **are not a SDSU faculty member** or do not have an SDSUid, do the following:

1. Go to **account.interfolio.com/login** **(bookmark link)**

2. Use 'Forgot your password?' & create password (if not created already)

If your institution has partnered with Interfolio to provide Single Sign-On, select your institution name from the list below.

San Diego State University - Graduate

Sign In

Sign in with an Interfolio account ›
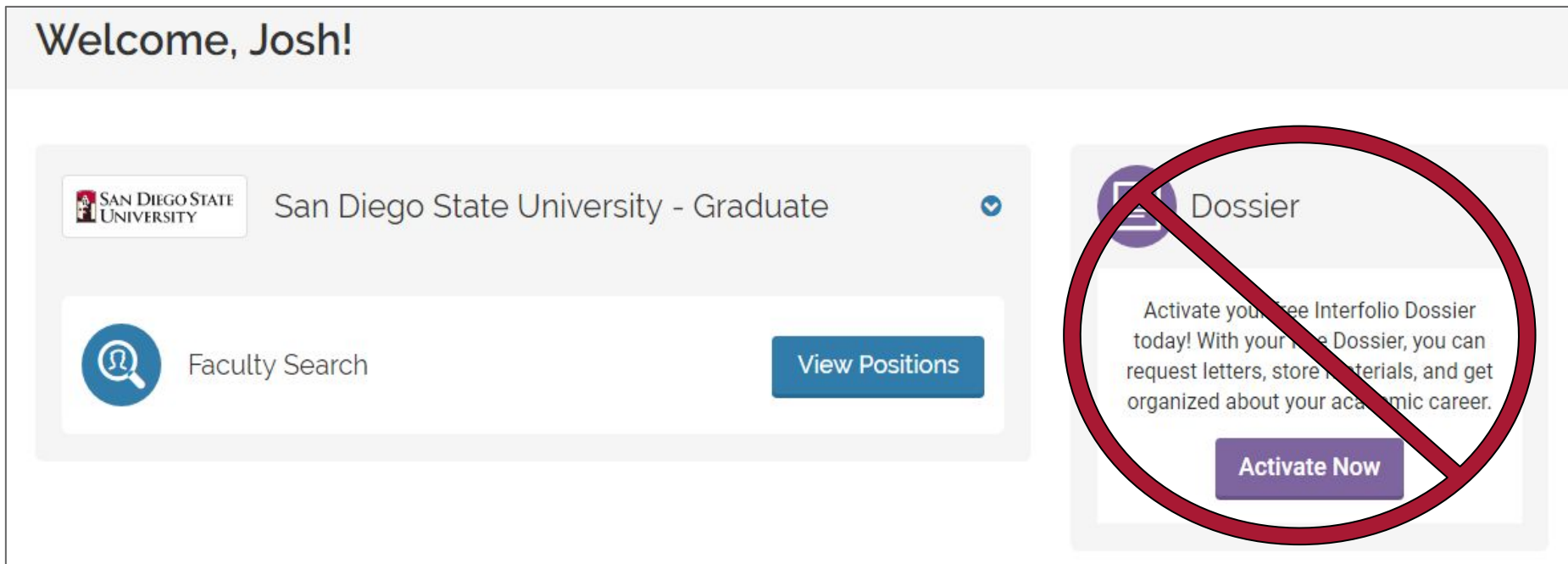
Sign in with email

Email *

Enter Email

Password *

Enter Password

Sign In

Forgot your password?

1.2 Getting Started: Interfolio Home Page

- Once logged into Interfolio, select '**View Positions**' under '**San Diego State University - Graduate**'

- **Note:** It is not necessary to activate or use the Dossier. This is for creating your own applications in the system.

1.3 Getting Started: Position Dashboard

- **Note: Please do not change administration settings, create new users or new positions in the system.** Contact us if your admin settings or users need to be adjusted.

2.1 Application Dashboard

The Applicant Dashboard is where you can view all applicants who have **submitted** applications.

○ **NOTE: In-progress applications DO NOT appear in interfolio until they are submitted by the applicant**

2.2 Application Dashboard:
Change Position Status

Changing the overall application status cuts off or makes available the application to applicants or reviewers.

Example Program

San Diego State University - Graduate
Opens: Nov 6, 2017 | Closes: Apr 1, 2018

Select Overall Application status here

Accepting Applications ⌄

Reviewing Applications
Interviewing Finalists
Decision Finalized

📥 Close Position

APPLICANTS (2 of 2)   Add ➕   Filter ⇆   Sav[ed]

Change Status   ✕

Please confirm you wish to change the status of this position to **Interviewing Finalists**.

WITH THIS STATUS ACTIVE:

See effect on applicant and reviewer access here

- Applicants **cannot** view this status.
- Applicants **cannot** update their application materials.
- Evaluators **can** review applications to this position.

☐ Send a message to all applicants with this change

Note: Contact us if you do not see a status that suites your purpose

2.3 Application Dashboard: Filters

Filters can be based on application status, tags, ratings or Form Responses (Program choice, etc).

- Note: Saved filters are not shared with other admin/reviewers

2.4 Application Dashboard: Columns

Columns are configurable by application status and form responses
- The max number of columns that will display are ~6 at a time

2.5 Application Dashboard:
App Action Options

Click on checkbox next to applicant name to view actions:

- Read (review and rate) application - see later section in guide
- Email Applicant
- Change status
- Tag Application
- Download or Archive

2.6 Application Dashboard: Email Applicants

Email Applicants

To: Josh Test

Select a Message Template

No Template ⌄

From Name *

Josh Admin

Reply to email address *

jljones+admin@mail.sdsu.edu

Subject *

Body *

Insert placeholder ▾

Enter Custom Text

You must provide a message.
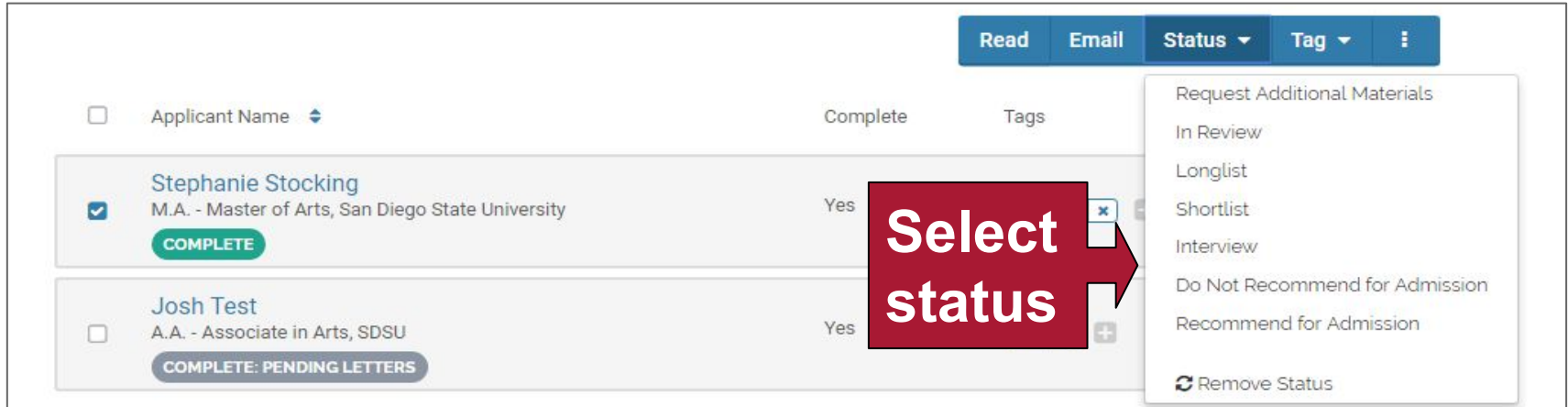
Preview   ✔ Send   Cancel

2.7 Application Dashboard: Email Example

Test Email to Applicant Inbox x

San Diego State University - Graduate <noreply@interfolio.com>
to me ▼

Email comes from noreply@interfolio.com

...DIEGO STATE
...VERSITY

Example message to applicant

San Diego State University - Graduate sent this message in reference to your application for Example Program.

Powered by Interfolio | Support
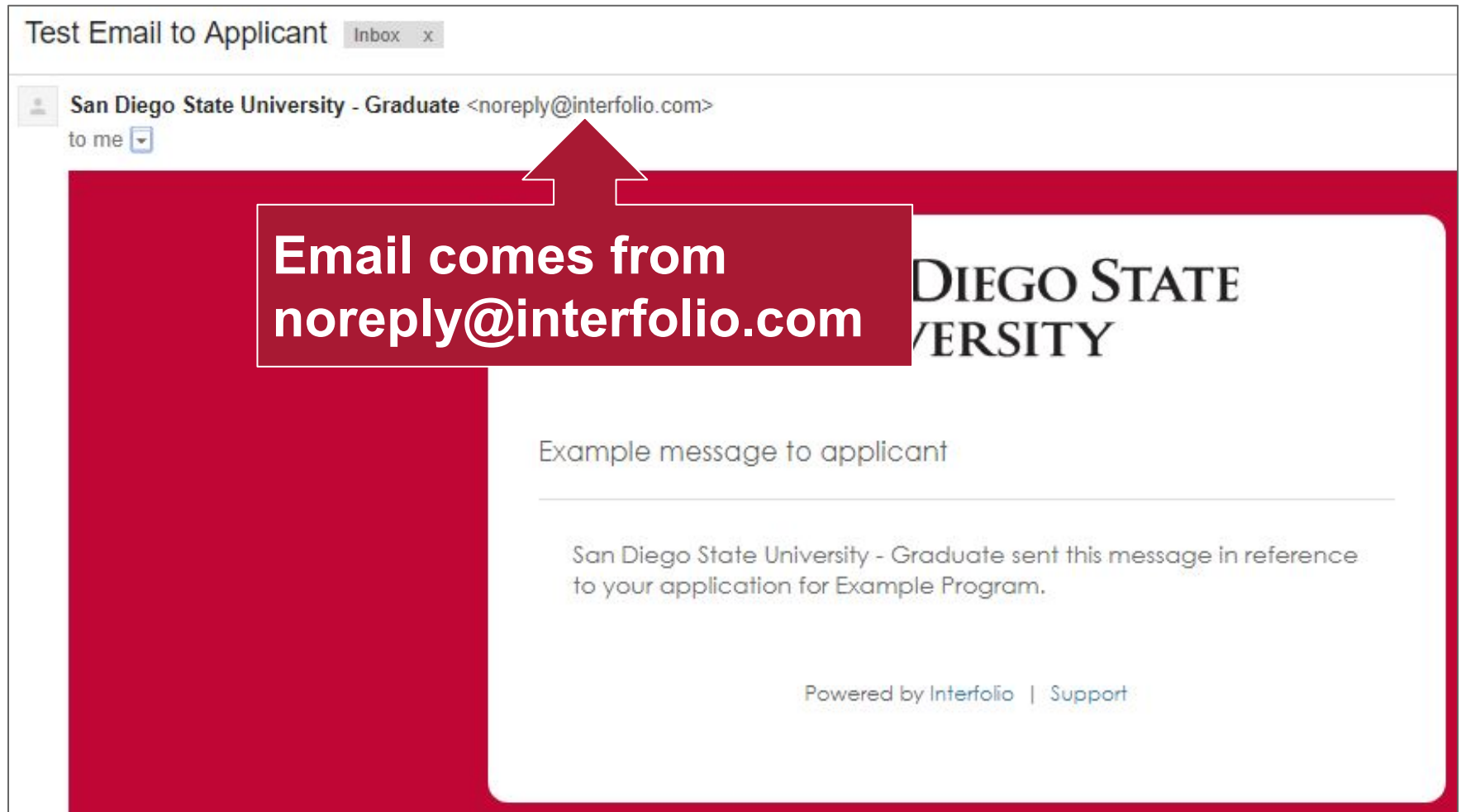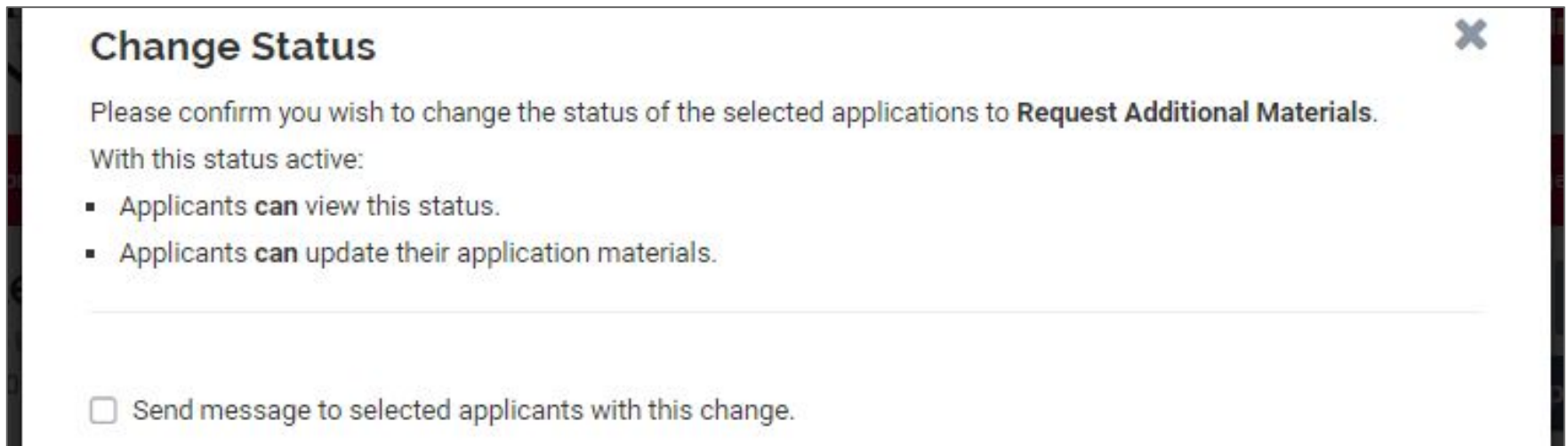
Note: If you would like applicants to be able to reply to you email, export the list of applicant emails and send from your email account.

2.8 Application Dashboard:
Change Application Status

Note: Contact us if you do not see a status that suits your purpose

2.9 Application Dashboard: Tags

Tags can be used to organize and sort application.
- ○ NOTE: All admin and reviewers will see tags you place on an application. Although, they do not have access to your list of tags (they will have to create their own tags)
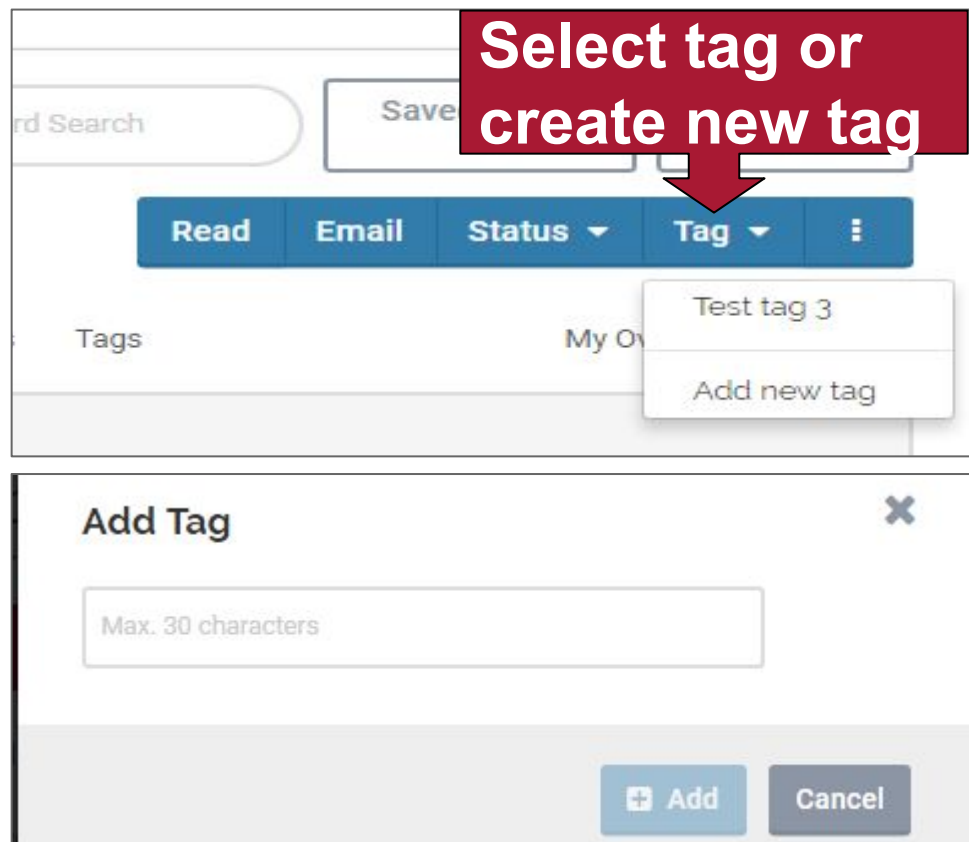
2.10 Application Dashboard:
Download or Archive

Click on the 'hamburger' menu to download or archive application
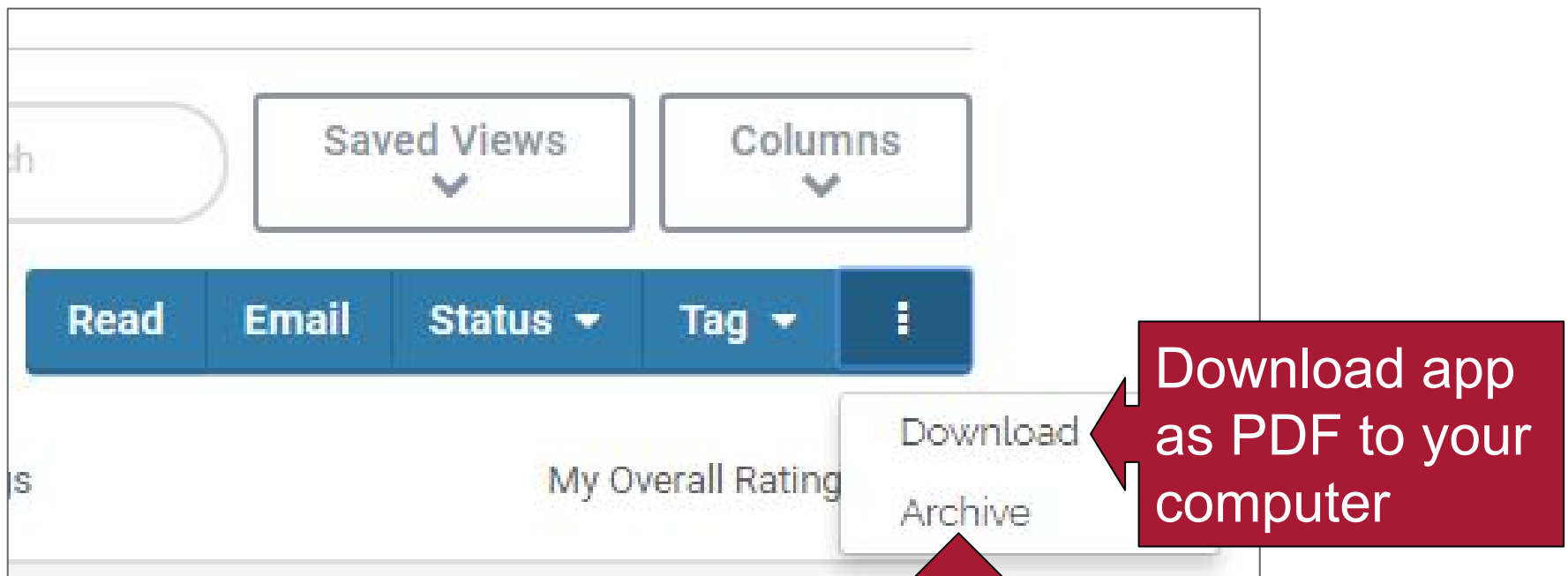
Download app as PDF to your computer

Archiving removes application from dashboard. You still access archived applications via the Filter function

2.11 Application Dashboard: Admin View of App

Click on name to view app

Josh Test
A.A. - Associate
☐
COMPLETE: PENDING
⊞
☆ ☆ ☆ ☆ ☆   1

Josh Test
Application for Example Program

◄ Return to Application List

A.A., SDSU
Tags: [Tag | ✕] ⊞

'Read' is easiest way to view application

Add document

Additional Options

⌄   **Documents**   ⊞ Add File   📗 Read   ⋮

Download

Mark Application Incomplete

Recommendation from T. Recommender for Engineering Sciences (PhD) - Fall 2018 (pending) ✉
Confidential Letter of Recommendation or Evaluation

Request Recommendation

Personal Statement 📄   Dec 1, 2017 ⬇
C.V.

Resume Example.pdf 📄
C.V.

Request LOR here

⌄   **Application Forms**

Test - Document Checklist
0 Questions

Note: Forms are only editable by applicant

3.1 Review: Reading Environment

In Interfolio, applications are reviewed in the **Reading Environment**. To get there, do the following:

1. Click on the individual application checkboxes you'd like to view or click on the top checkbox in the header to view all

2. Then, select the '**Read**' button that appears above the header

3.2 Review: Navigation

Navigate the Reading Environment via the following ways:

1. Use arrow buttons to switch between applications
2. Navigate between major sections by clicking on each section
3. Navigate within a section with bottom arrows or the scroll bar

3.3 Review: Reading Environment Functions

There are 5 functions available to you in the Reading Environment:

1. Leave comments
2. Place tags
3. Enter Ratings
4. Download entire application as a PDF
5. Add Annotations

3.4 Review: Leaving Comments

1. Click on 'Comments'
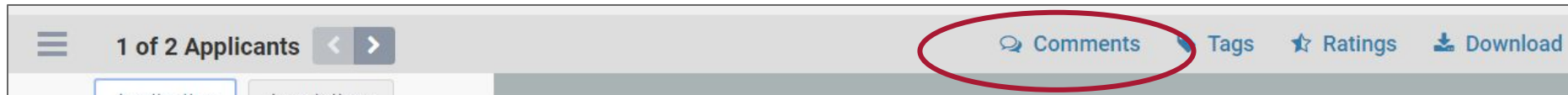
2 . Provide comment and click 'Save'.
NOTE: Comments are visible to other reviewers (unless function turned off by department administrator)

3.5 Review: Placing Tags

Only place tags if directed to do so by your department administrator. If directed to do so, you can place a tag on an application as follows.

1. Click on 'Tags'

2 . Click on '+' button
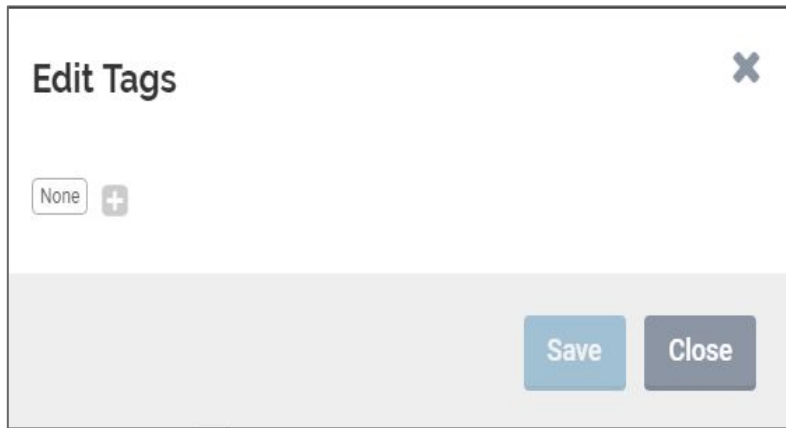
3 . Select one of your tags or create a new tag.
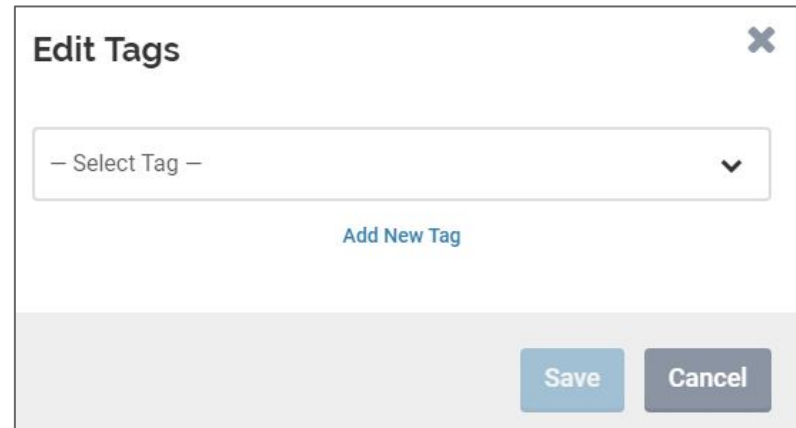
NOTE: Other reviewers will see the tags placed on an application.

3.6 Review: Enter Ratings

1. Click on 'Ratings'
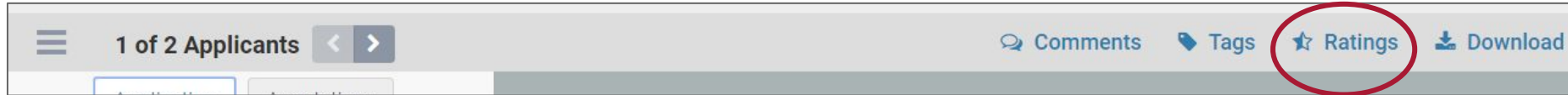
2. Provide individual ratings. The overall rating is automatically calculated and cannot be edited.

Note: Individual ratings **can be** edited after they are completed.

3.7 Review: Download Application

1. Click on 'Download'

2. A PDF version of the entire application will be automatically downloaded to your computer

3.8 Review: Add Annotations

Only place tags if directed to do so by your department administrator. If directed, do so as follows:

1. Click on annotation Icon at the bottom of the page

2. Indicate where you would like to place your annotation by either pointing, selecting an area or highlighting text.

3.9 Review: View Others' Comments/Ratings

1. Navigate back to the Applicant Dashboard and click on applicants name.

☐	**Applicant Name** ⬍	Date Updated ⬍
	Josh Test	
☐	A.A. Associate in Arts, SDSU	Dec 1, 2017
	COMPLETE: PENDING LETTERS	
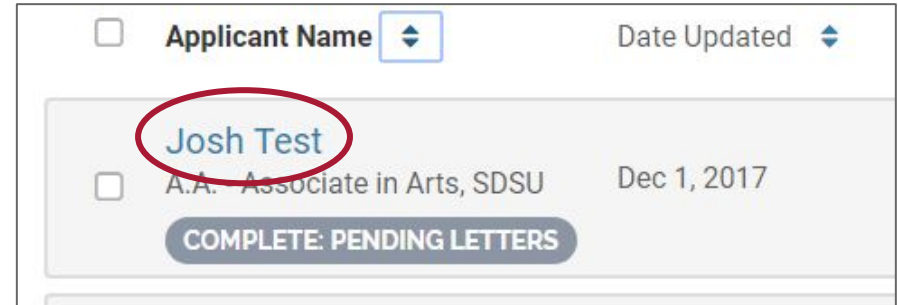
2. Scroll down to the rating and comments section.
Note: if your program's review is blind, you will not see others' comments/ratings Setting determined by department administrator.

⌄ Ratings		My Ratings	Committee Summary
Average		★ ★ ⯪ ☆ ☆	★ ★ ★ ⯪ ☆
Academic Standing		★ ★ ★ ☆ ☆ ✖	★ ★ ★ ★ ☆
Test Scores		★ ★ ☆ ☆ ☆ ✖	★ ★ ★ ⯪ ☆
Recommendations		★ ★ ☆ ☆ ☆ ✖	★ ★ ★ ⯪ ☆

⌄ Comments	➕ Add Comment
Showing: All Comments ⌄	
Me | Dec 1, 2017 Great applicant	✏ 🗑
Matt Brown | Dec 1, 2017 test test test	

4.1 Position Settings

NOTE: Editing sections other than 'Evaluation Settings' and 'Search Committee' can cause **major issues**. Contact us if you need changes to app.

4.2 Position Settings: Evaluation Settings

Evaluation Settings
Example Program

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3 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.

Academic Standing	✖
Test Scores	✖
Recommendations	✖

+ Add Criterion ⬅ **Add rating criteria**

Blind Review

☐ Evaluators should not see others' comments and ratin... **Turn on/off blind review (whether reviewers can see each others' comments / overall ratings)**

✔ Update   Return to Overview
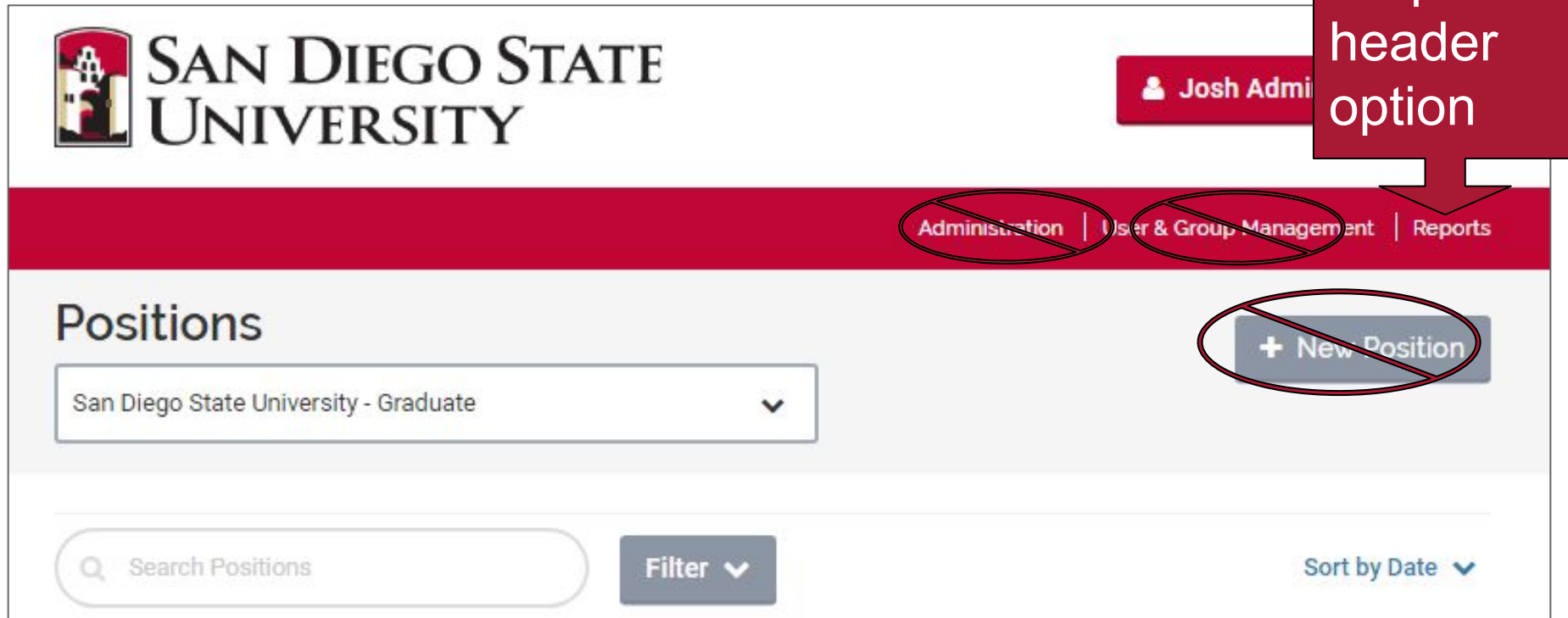
NOTE: All evaluation criteria are rated on a 5 star scale. A total (average) star rating is automatically calculated in the system and is viewable by admin and reviewers (if blind review turned off). See Review section.

4.3 Position Settings: Search Committee

Once you are ready for reviewers to begin, distribute this [Reviewer Guide](). It contains instructions on how to sign in and conduct their reviews. **NOTE:** If you do not see a reviewer in the system after searching, contact us and we will add them to the system.

5 Reports

Select 'Reports' header option

- **Note: Please do not change administration settings, create new users or new positions in the system.** Contact us if your admin settings or users need to be adjusted.

5 Reports (Cont)

Reports

Applications Report | Positions Report | Form Report | Logs

Applications (25 of 38)

Search | Saved Reports | Columns

Select if form only data needed

UNIT

☐ College of Health an... 38
☐ San Diego State Uni... 38
☑ School of Social Work 38 ← **1) Select dept**

N LABEL

☐ Accepting Applicatio... 38

No choices available.

OVERALL APPLICATION RATING

Filtered by No Rating Clear

COMPLETENESS

☐ Complete 21
☐ Complete: Pending Letters 15

HIGHEST DEGREE

☐ B.A. - Bachelor of ... 22
☐ B.Sc. - Bachelor o... 9
☐ A.A. - Associate in... 1
☐ Bachelor in Social... 1
☐ High School/GED 1
☐ J.D. - Juris Doctor 1

POSITION NAMES

☐ Social Work (MSW): ... 37
☐ Social Work (MSW): ... ← **2) Select position**

APPLICATION STATUS

2

SELECTED ○ Yes ○ No ⊙ All

ARCHIVED ○ Yes ○ No ⊙ All

WITHDRAWN ○ Yes ○ No ⊙ All

DATE OF FINAL SUBMISSION
From 📅 | To 📅

DATE OF SUBMISSION
From 📅 | To 📅

Filter by Form Responses

School of Social Work ✕ | Save | Clear Filters

Download CSV

5 Reports (Cont)

Applications Report	Positions Report	Form Report	Logs

Applications (25 of 37)

Filter ⇄   Q Search   Saved Reports ⌄   Columns ⌄

Columns   Restore Default

Q Search

EDUCATION HISTORY ⌄

SOCIAL WORK (MSW) QUESTIONS ⌃

UNIT Q
- ☐ College of Health an... 37
- ☐ San Diego State Uni... 37
- ☑ School of Social Work

POSITION STATUS Q
- ☐ Accepting Applicatio... 37

APPLICATION LABEL
No choices available.

OVERA
Filter

HIGHEST DEGREE
- ☐ B.A. - Bachelor of ...
- ☐ B.Sc. - Bachelor o... 9
- ☐ A.A. - Associate in... 1
- ☐ Bachelor in Social... 1
- ☐ High School/GED 1
- ☐ J.D. - Juris Doctor 1

3) If desired, filter by other criteria

4) Select columns to display (email, form responses etc)

- ☐ Are you interested in the Title IV-E Child Welfare Training Stipend Program?
- ☐ Degree Earned
- ☐ Do you have an undergraduate degree in Social Work / Social Welfare from an accredited School of Social Work (CSWE)?
- ☐ Have you completed an

Done

DATE OF FINAL SUBMISSION
From 📅 To 📅

DATE OF SUBMISSION
From 📅 To 📅

Filter by Form Responses

School of Social Work ✕

Social Work (MSW): Direct Practice & Administration and Community Development - Fall 2018 (ID: 29059) ✕

5) Download CSV file → **Download CSV**

6 Help Resources

Interfolio Technical Support
- Contact Interfolio directly for any **technical issues** (e.g., logging in to the system): **help@interfolio.com** or **(877) 997-8807.**

Graduate Admissions
- For **questions about Cal State Apply, RedID, Webportal and sending official documents,** applicants should contact Graduate Admission: **admissions@sdsu.edu** or **619-594-6336**

Graduate and Research Affairs Technology Team
Program advisers, coordinators and reviewers, we're here to help!
- Contact us at: **grahelpdesk@sdsu.edu**