(updated 4/11/2025)

FACULTY SEARCH TRAINING GUIDE FOR COMMITTEE MANAGER

School of Medicine & Dentistry

Welcome to UR Faculty, our new comprehensive Faculty Information System! This training guide covers the Faculty Search module of UR Faculty, focusing on the role of an administrator.

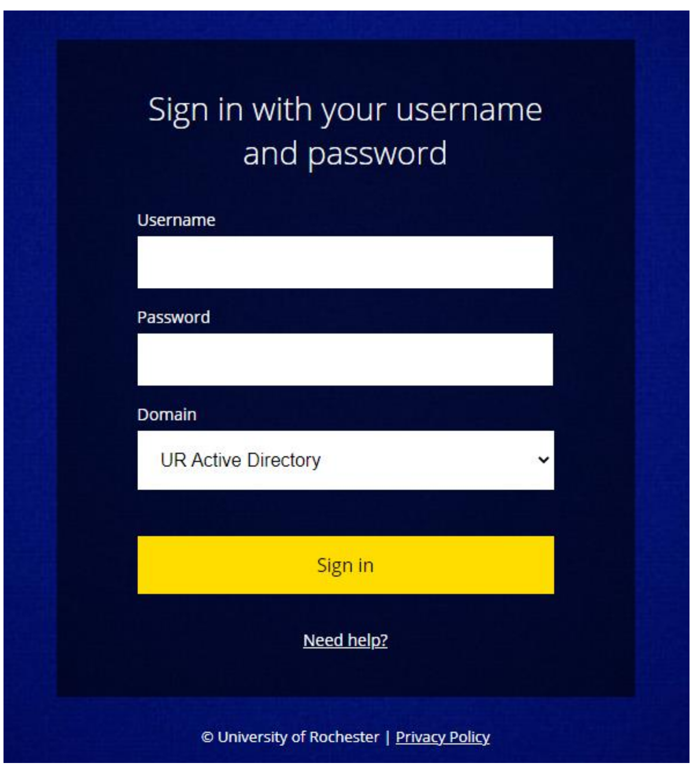
Note: You must be included the UR Faculty: Faculty Search database in order to access Faculty Search. If you are not or would like to request access on behalf of a new user, please send an email to URFacultyHelp@rochester.edu and include:

- User's full name
- Email address
- URID, if possible
- School/department
- Role (Administrator/Committee Manager/Evaluator)

For information on role definitions and permission levels, see Interfolio's help site: https://product-help.interfolio.com/en_US/managing-users/user-roles-in-interfolio-faculty-search

SIGN IN

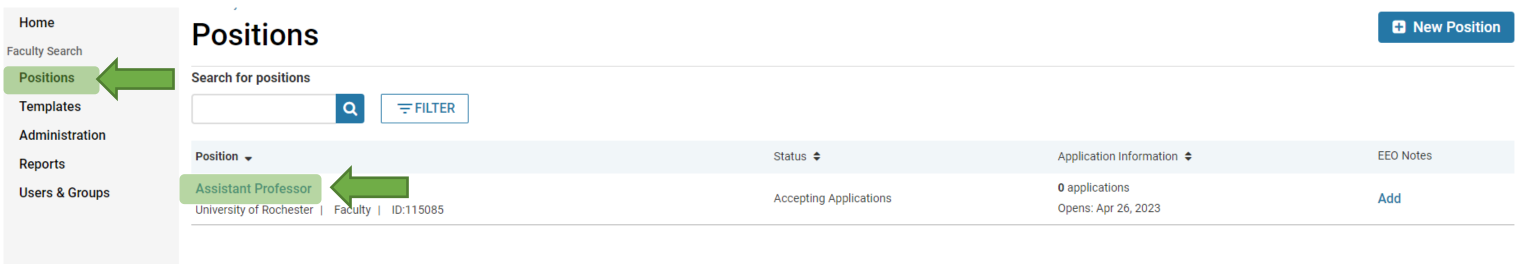
- **Access Interfolio at: https://iam-api.interfolio.com/users/sso_redirect?tenant_id=16224**
- **Fill out your username and password (SSO login credentials for University of Rochester) and select the appropriate domain**
- **Click on "Sign in"**



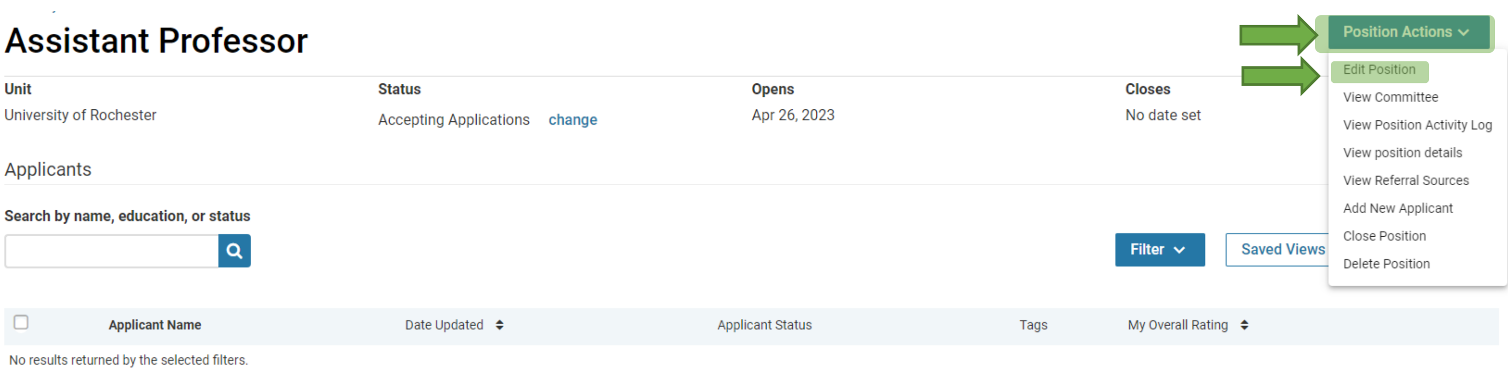
EDIT AN EXISTING POSITION

EDIT POSITION

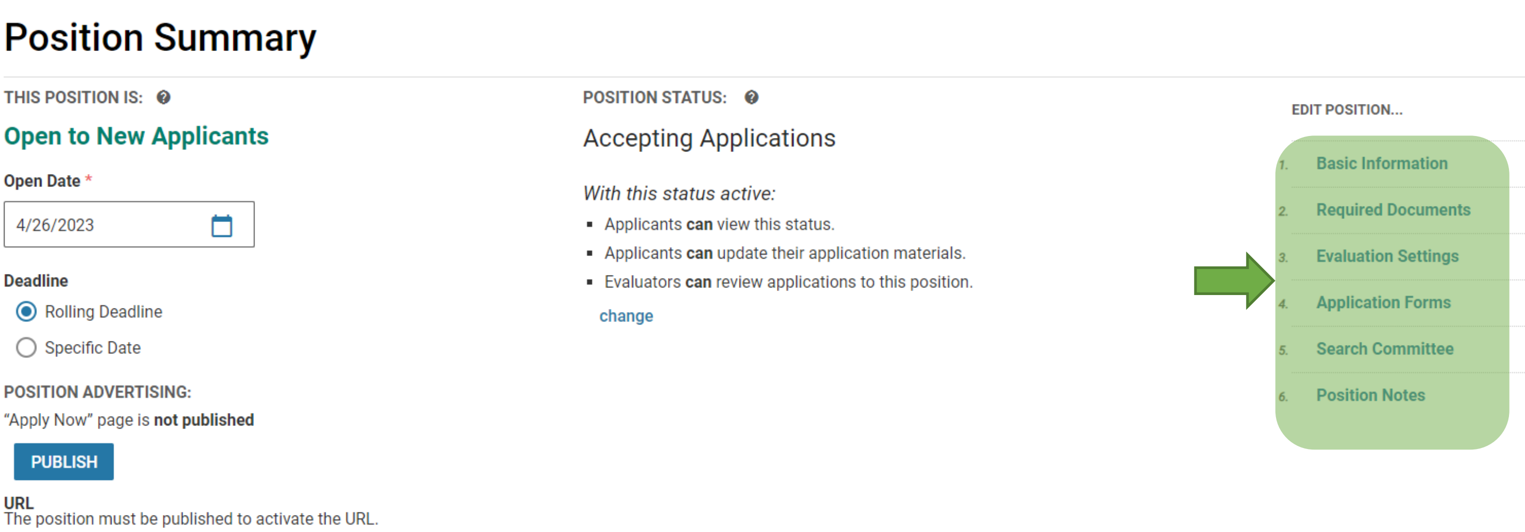
- **Note: After the position has been approved, the Office of Academic Affairs will receive email notifications for position edits.**
- **From the UR Faculty home screen, click on "Positions" on the left menu**
- **Click on the position from the list of positions displayed**



- **Click on "Position Actions" at the top right corner and select "Edit Position"**



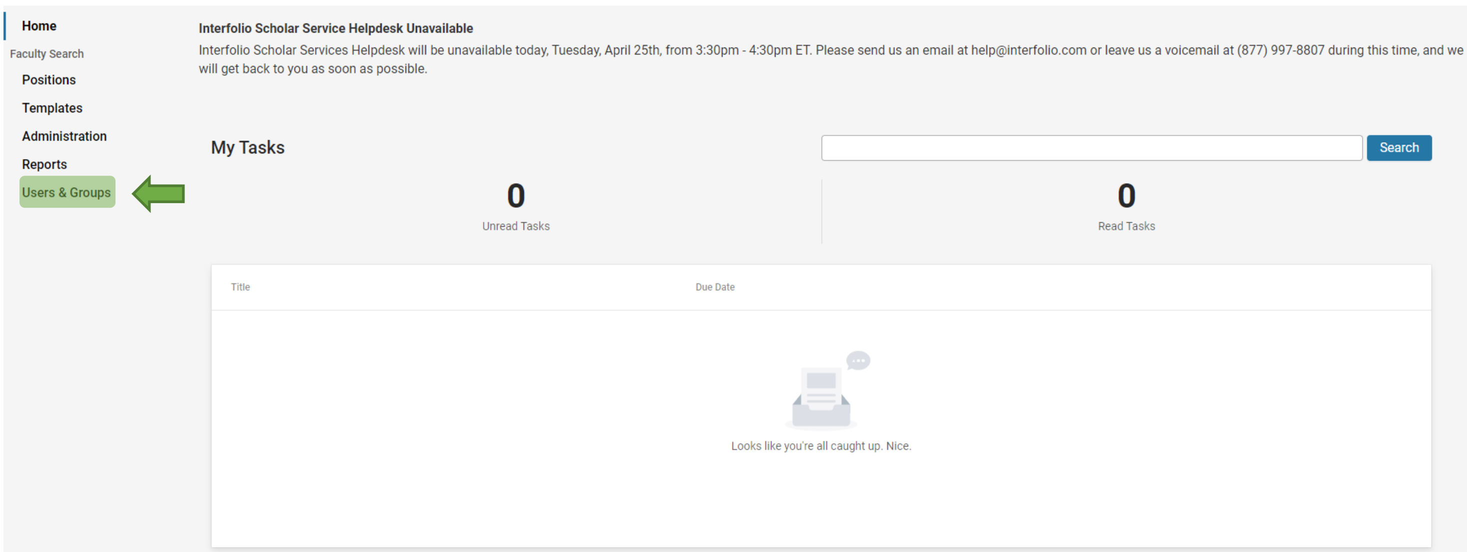
- **Under the "Edit Position" menu on the right side, select the section you want to edit.**



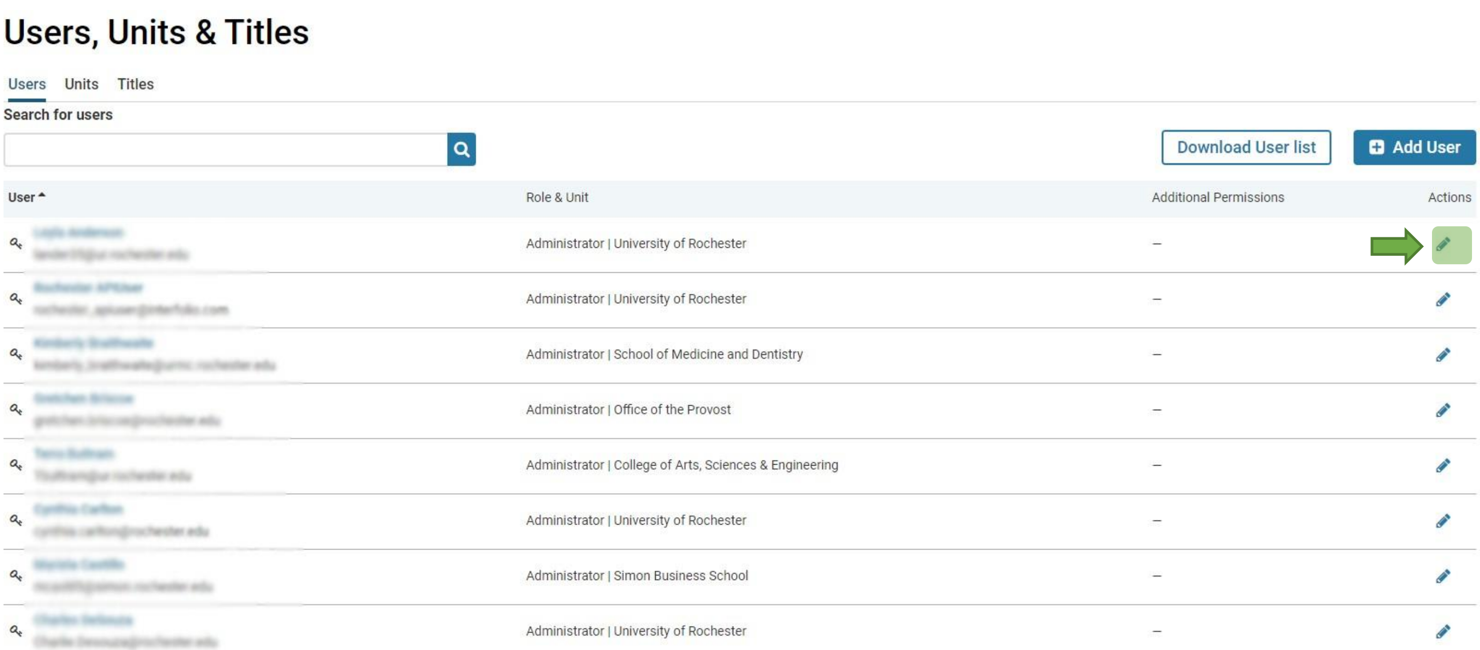
For more information on editing an existing position, see Interfolio's help site: https://product-help.interfolio.com/en_US/creating-and-managing-positions/edit-an-existing-position

SETTING A USER'S PERMISSION LEVEL

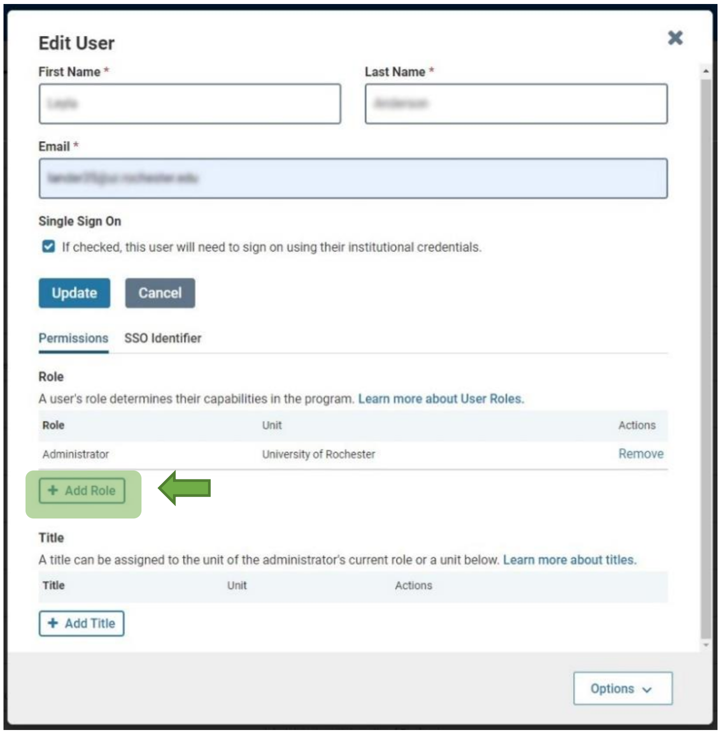
- **Administrators and Committee Managers can set the permission level of users in their unit and below. By default, users have the permission level of an Evaluator. If you are trying to add a user as a Committee Manager but do not see their name as a selectable option when creating/editing a search committee, you will need to assign that user a Committee Manager role.**
- **From the UR Faculty home page left side menu, click on "Users & Groups"**



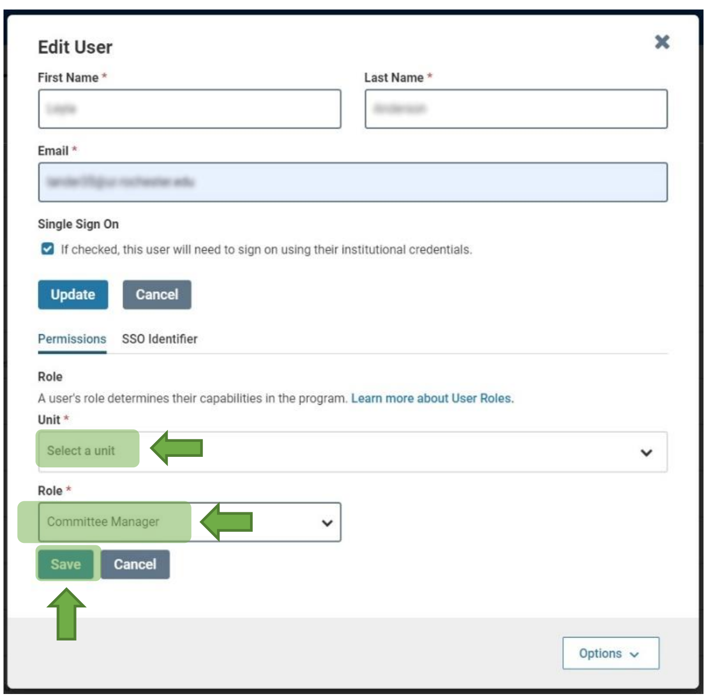
- **Click on the pencil icon on the right side of the desired user's name.**



- **Under “Permissions”, click on “+ Add Role”**



- **Select your unit from the drop down list and select the appropriate permission level under Role**
- **Click “Save”**



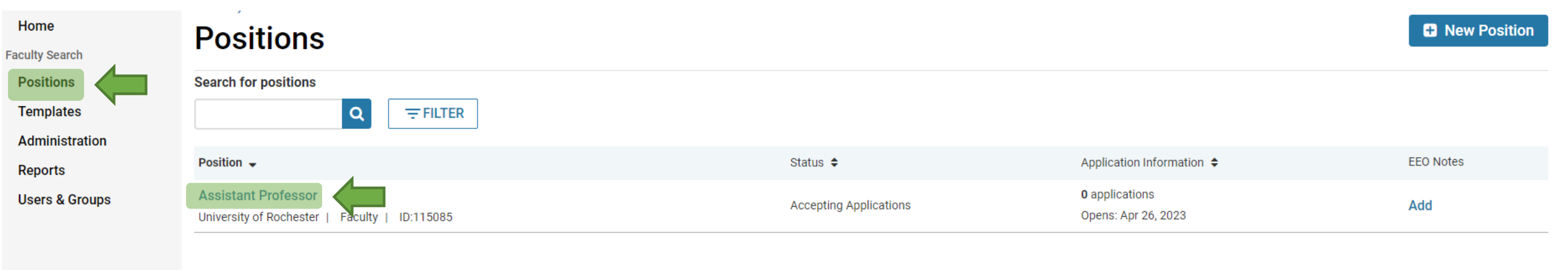
- **Note: if you are trying to add someone to your search committee who is not in the UR Faculty database at all, please do not add a new user yourself. Please contact URFacultyHelp@rochester.edu so that the UR Faculty team can set up the new user with the correct security settings. Once they are in the database as a user, you can add them to your search committee.**

For more information on changing a user's role, see Interfolio's help site: https://product-help.interfolio.com/en_US/managing-users/change-a-users-role-or-delete-a-user-in-faculty-search

MANAGE A SEARCH

CHANGE POSITION STATUS

- **From the UR Faculty home screen, click on "Positions" on the left menu**
- **Click on the position from the list of positions displayed**



- **You are now on the position profile page. Under Status and next to the current position status, click "change". When you choose a new position status, a pop-up will display what that status means for current applicants and evaluators. The position status does not affect whether new candidates can apply to the position or not (use open date/unpublish position/close position to control that).**
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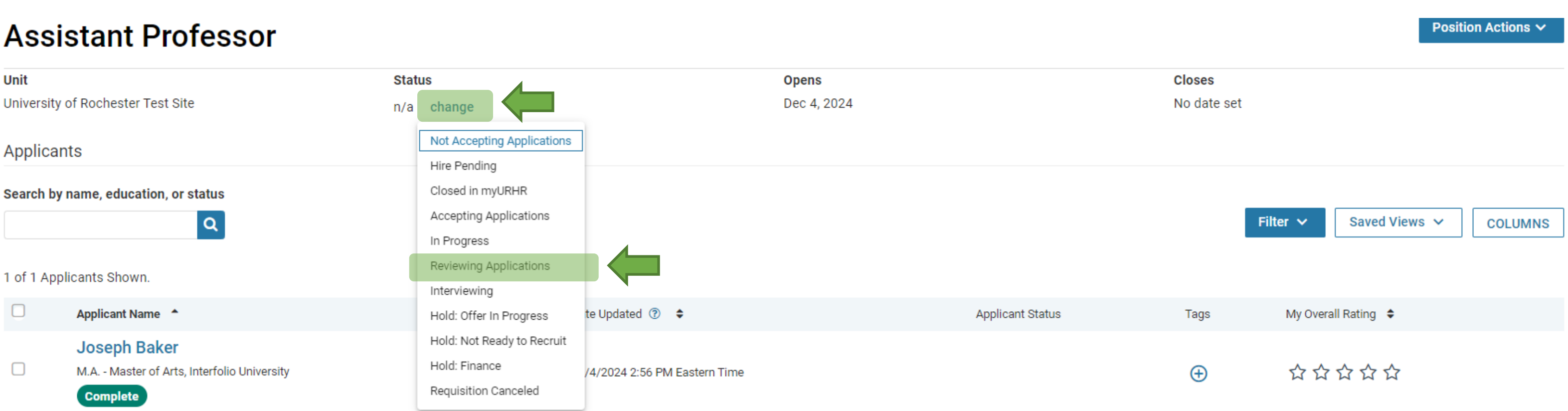
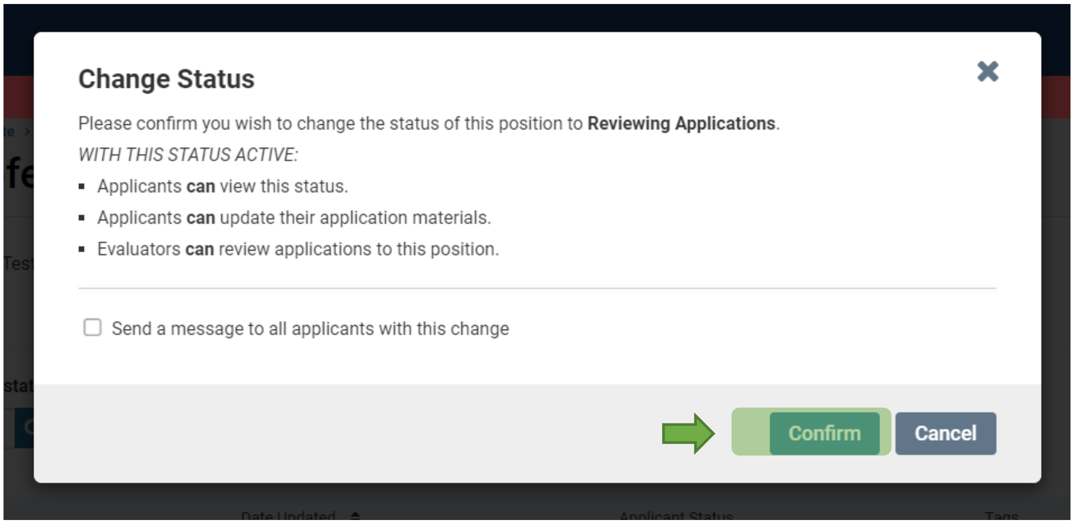
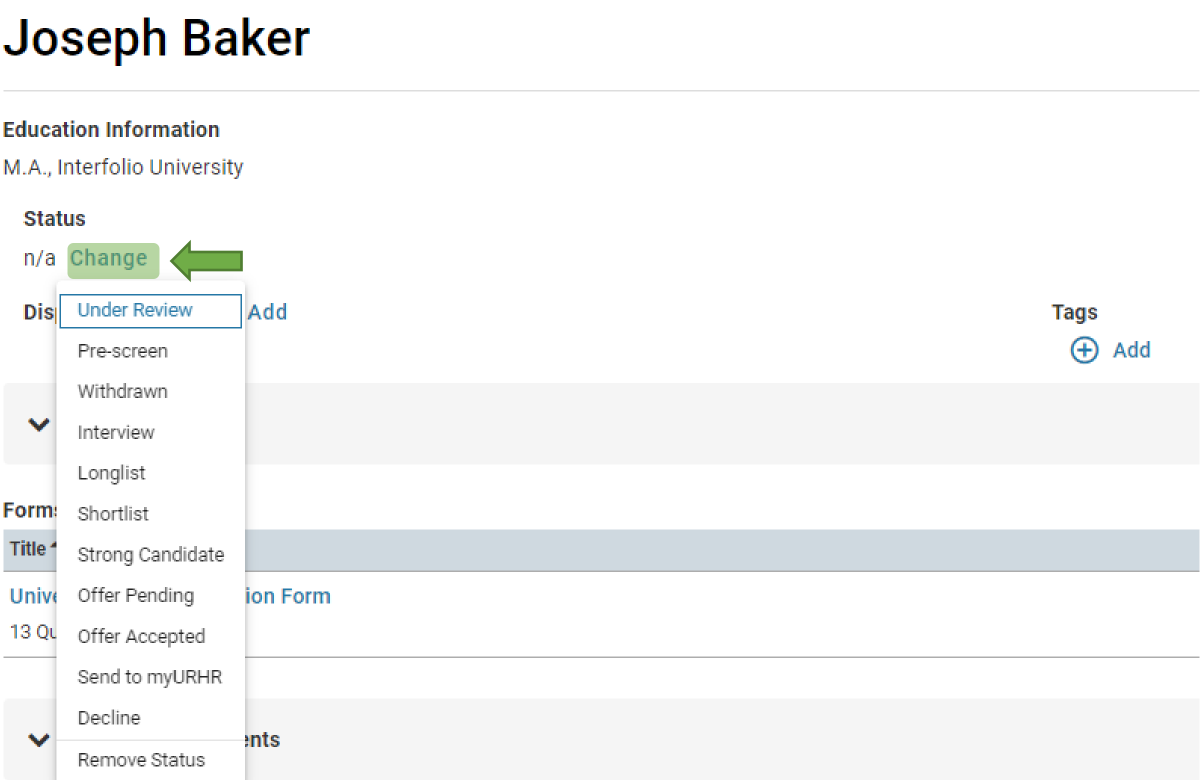


- **Select the desired position status and click "Confirm" on the pop-up window.**



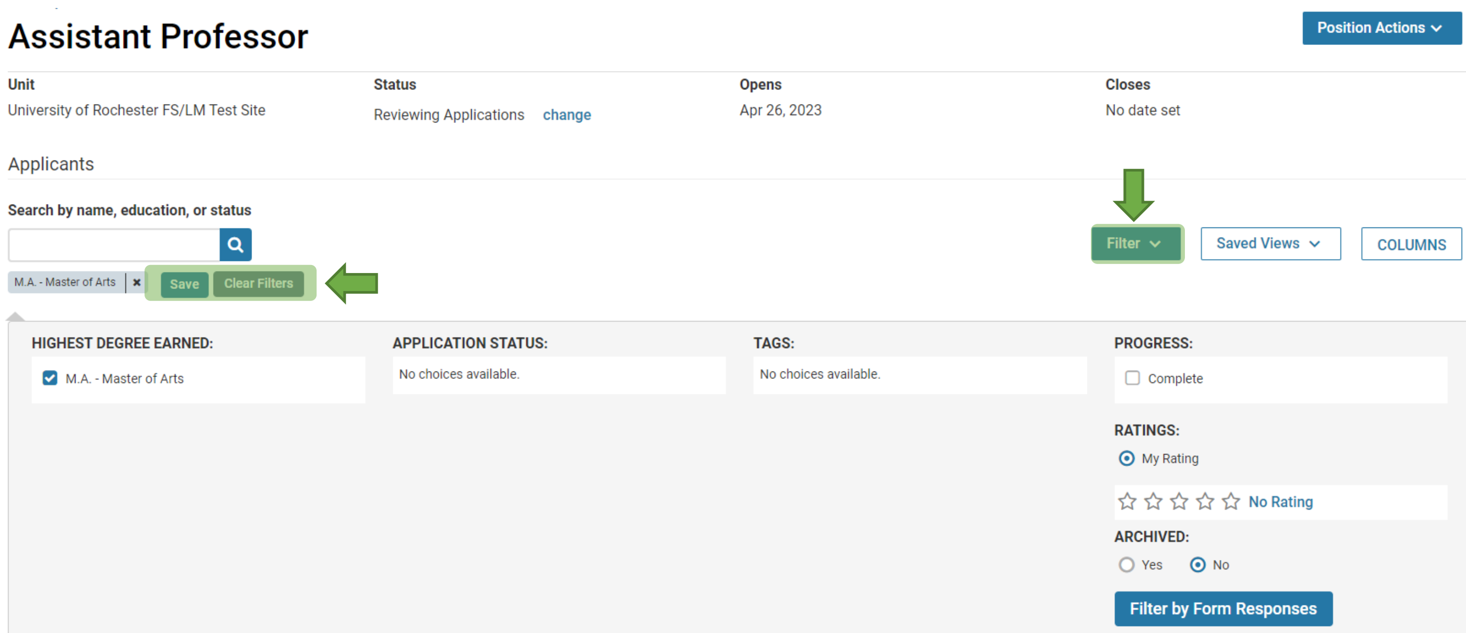
USE APPLICATION STATUS

- **Use application statuses to track the progress of applications. Application statuses can also be filtered by in Faculty Search reports, which might be useful for you.**
- **On the position profile page, you will see the pool of applicants who have applied for the position. Click on an applicant's name to enter their application profile page. Under Status, click "change". When you choose a new application status, a pop-up will display what that status means for the applicant.**
- **Select the desired application status and click "save" on the pop-up window.**



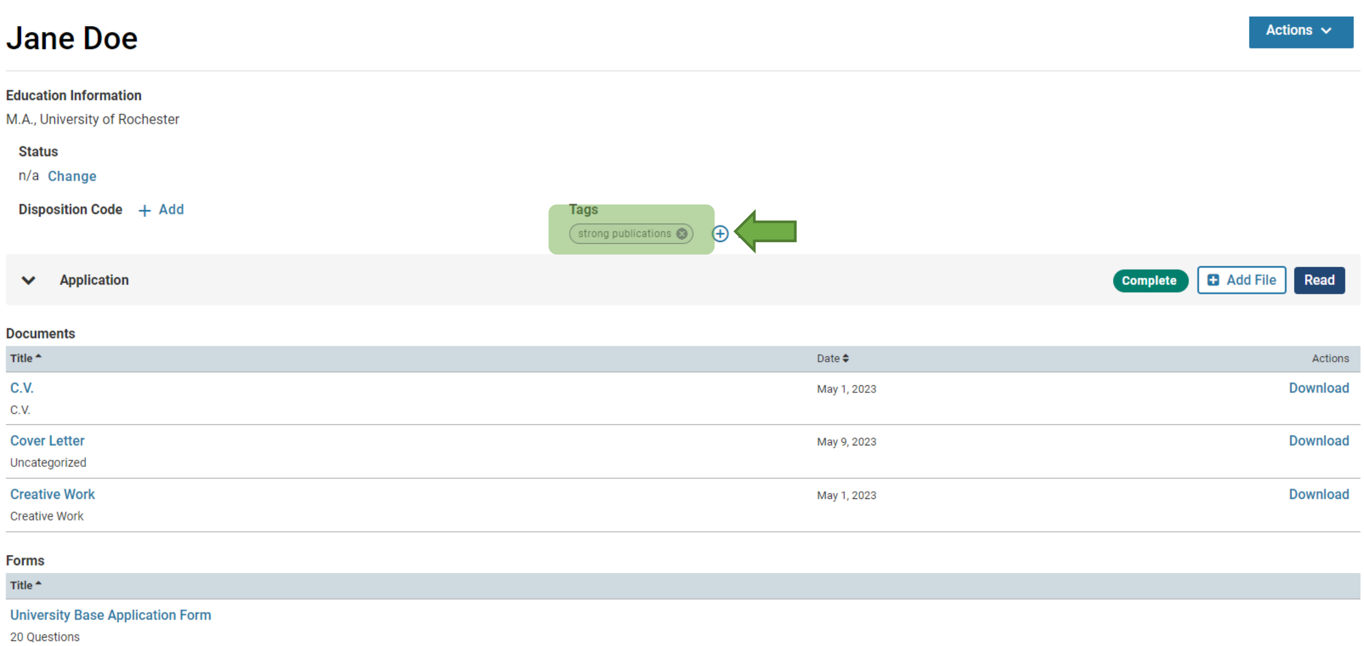
FILTER APPLICANT POOL

- **The list of applications can be filtered by data points including highest degree earned, application status, tags, completion status, ratings, or form responses**
- **Click "Filter" and apply desired filters**
- **The filtered view can be saved by clicking "Save" or cleared by clicking "Clear Filters"**



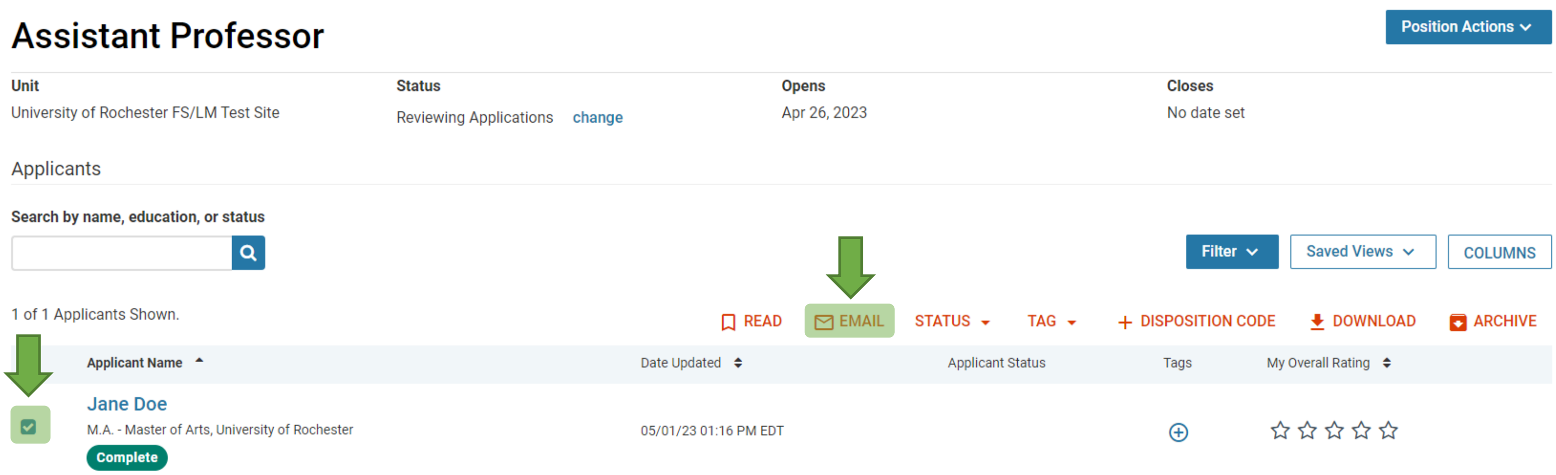
USE TAGS TO MARK & SORT APPLICATIONS

- **Tags are used to help sort, categorize, and quickly identify applications. Tags are visible to other committee members.**
- **On the applicant's profile under "Tags" click "+ Add" to add a tag.**
- **Alternatively, tags can also be added in bulk from the position page.**

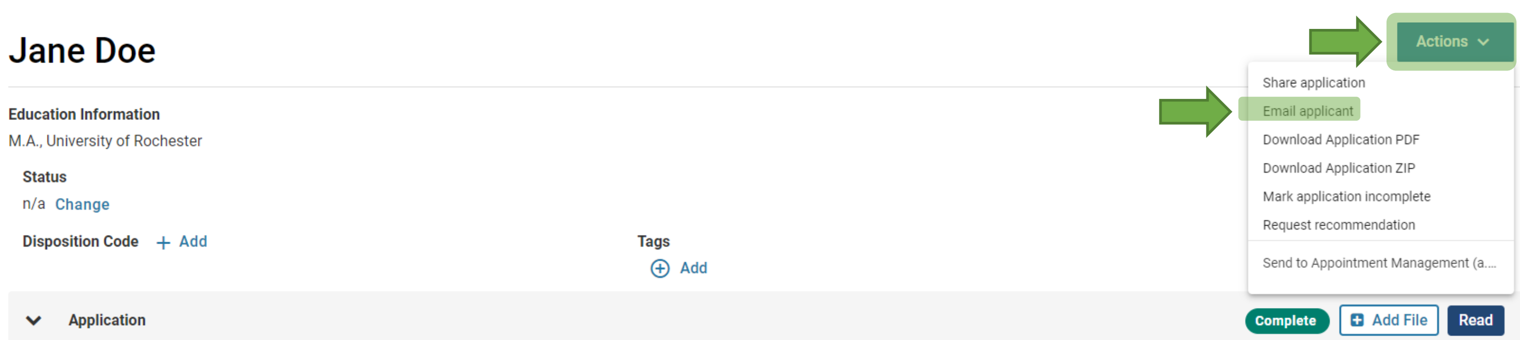


EMAIL APPLICANT(S)

- **From the position profile, select the checkbox next to the desired applicant(s).**
- **Names of applicants who applied for the position will appear on this position page. Select the checkbox next to the desired applicant(s).**
- **A red horizontal menu bar will appear. Click on "Email"**

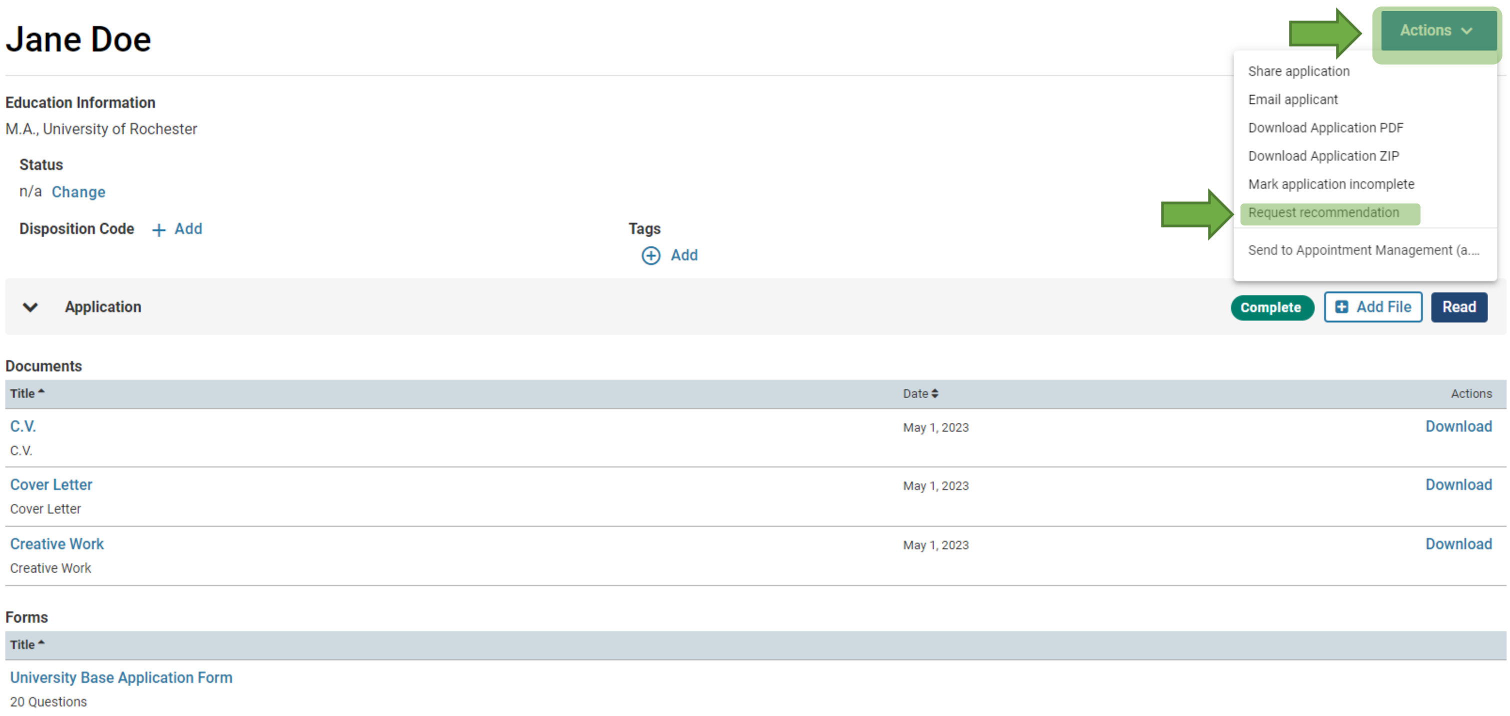


- **Fill out the information on the pop-up window and click "Send".**
- **Alternatively, to email a singular applicant, you can also click on the applicant's name to see the applicant's profile. Then click "Actions" from the top right menu, and click "Email applicant".**



REQUEST LETTER OF RECOMMENDATION ON BEHALF OF AN APPLICANT

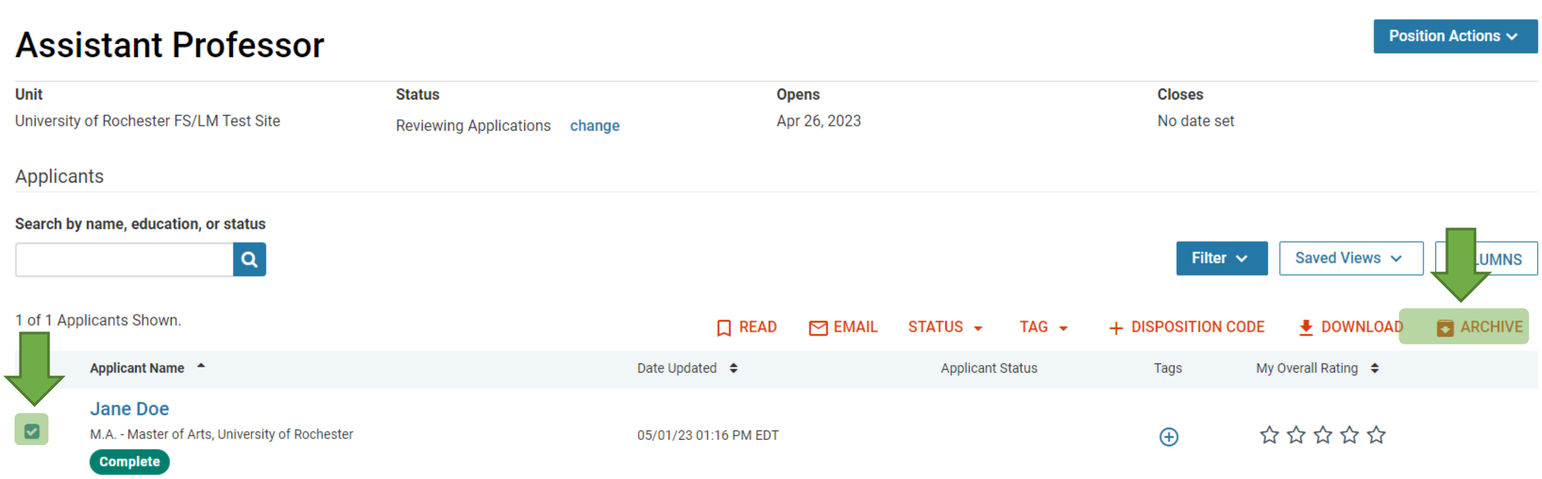
- From the applicant's profile, click "Actions" from the top right menu, and click "Request recommendation"



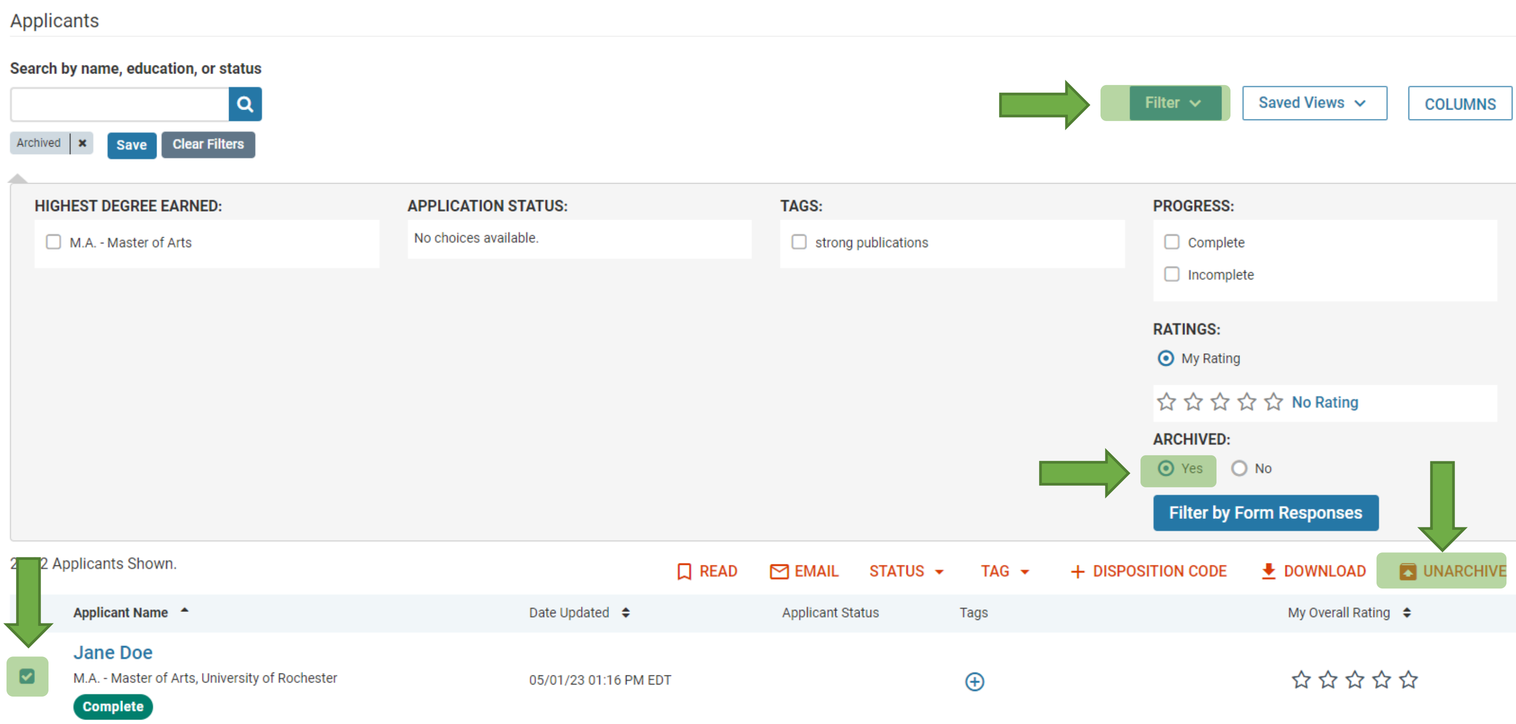
- Fill out the recommendation request page and click "Send"

ARCHIVE OR UNARCHIVE AN APPLICATION

- During the search process, you may want to archive specific applications so that it is no longer displayed in the applicant pool (unless you change the filters). For example, if an applicant is not moving on to the next stage of the recruitment process, you may choose to archive their application so it is no longer visible to Evaluators.
- From the position profile, select the checkbox next to the desired applicant(s).
- Select the checkbox next to the desired applicant(s)' name.
- A red horizontal menu bar will appear. Click on "Archive"

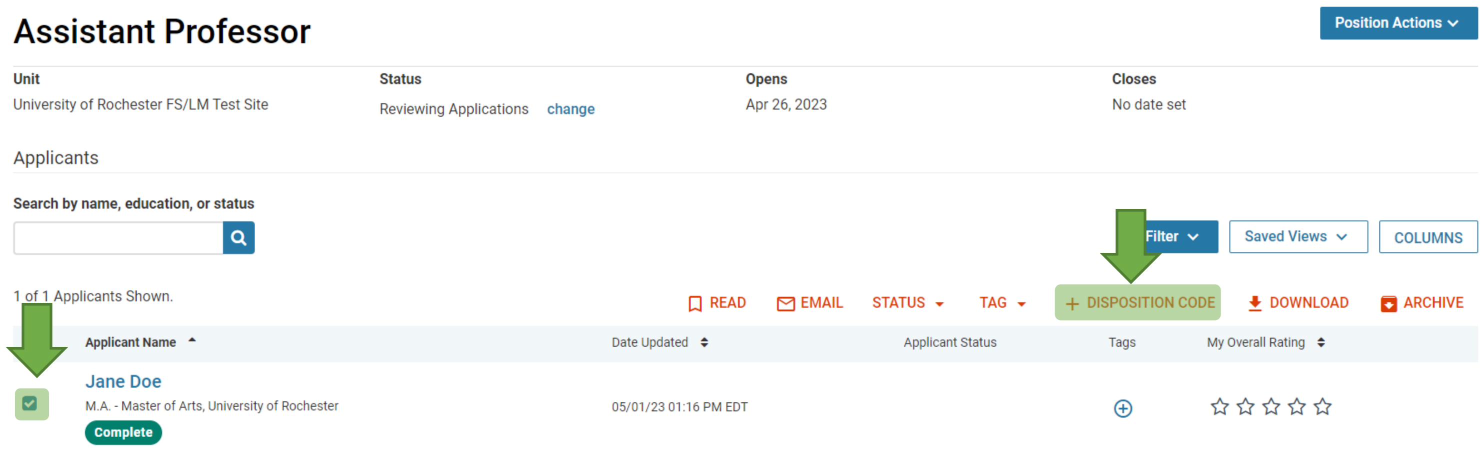


- **To unarchive, click the Filter button above the list of applicants. Select "Yes" under "Archived" to filter the list to display only archived positions.**
- **Select the checkbox next to the desired applicant.**
- **On the red menu bar that appears, select "unarchive"**

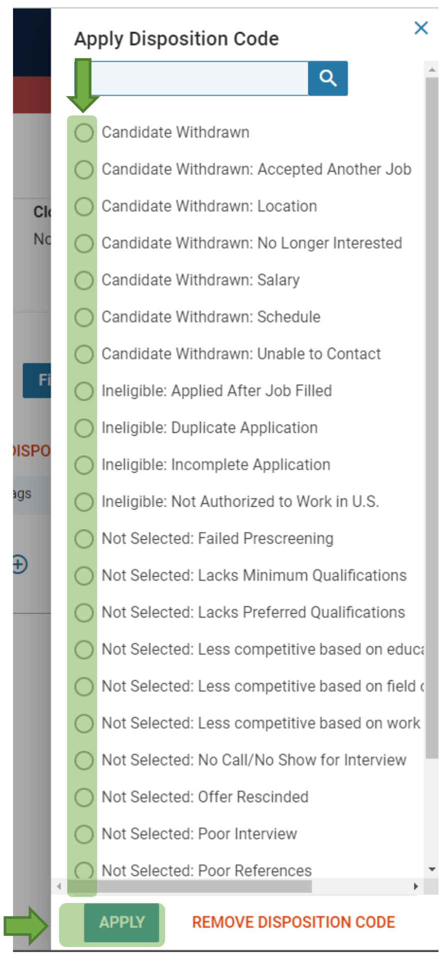


APPLY DISPOSITION CODES

- **Once an applicant has been selected for hire and you are getting ready to close out the position, you will first apply disposition codes to all the applicants who have not been selected, including the applications you may have archived (change the filters to display archived applications).**
- **On the position profile page, select the checkbox next to the desired applicant(s)' name.**
- **A red horizontal menu bar will appear. Click on "Disposition Code"**



- **Select the desired disposition code and click "Apply"**



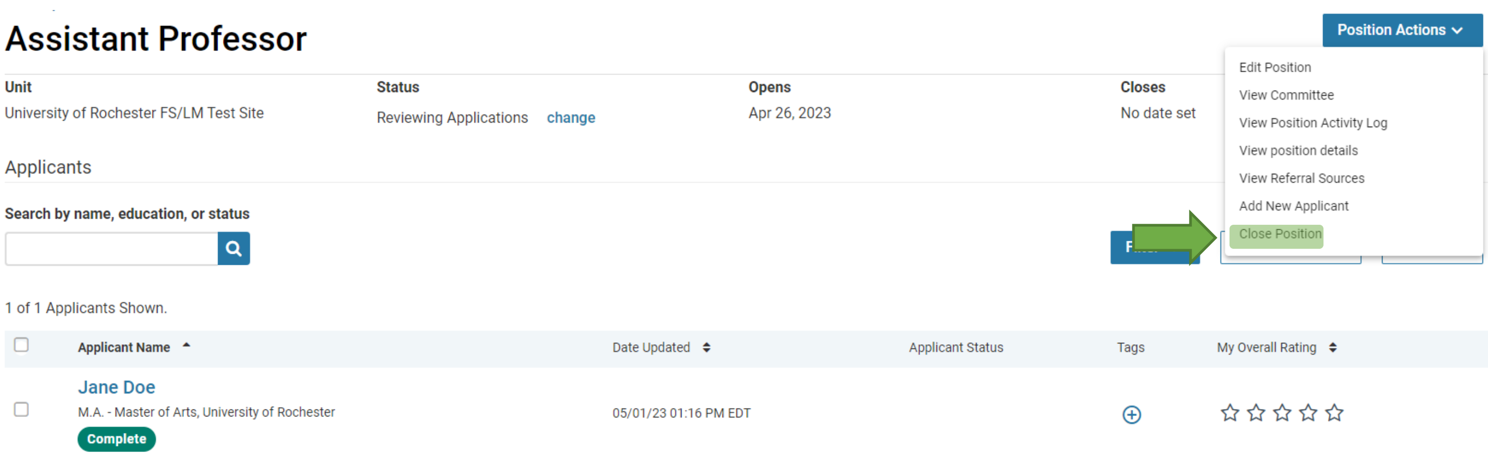
- **Alternatively, to apply a disposition code to a singular applicant, you can also click on the applicant's name to see the applicant's profile. Then next to Disposition Code, click "+ Add"**

HOW TO REMOVE A POSITION FROM APPLICANT VISIBILITY **(any one of the following)**

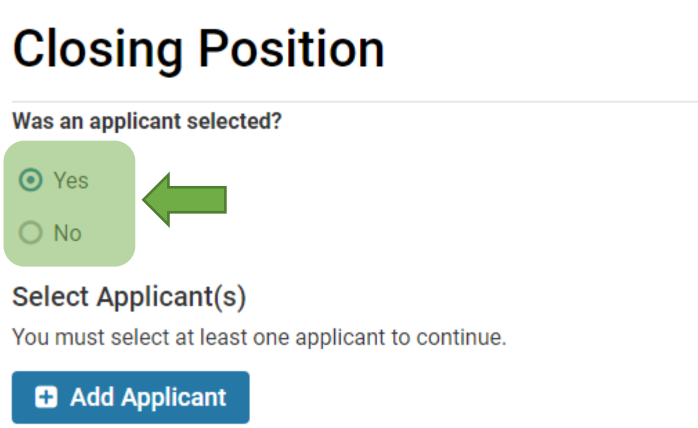
- **Update application deadline to a date that has passed**
- **Unpublish the position**
- **Close the position – if you are ready to hire the applicant who has accepted an offer**

CLOSE POSITION

- **Please follow the University of Rochester Posting Requirements guidelines for your school regarding the number of days a position must stay open.**
- **Please note that positions with applications attached to them can only be closed, not deleted.**
- **From the position page, click on "Position Actions" from the top right drop down menu and click "Close Position."**



- **Indicate if an applicant has been selected.**
- **If "yes" click on "+ Add Applicant", select the desired applicant, and click "Close Position"**
- **If "no" add a note to document why no selection was made, and click "Close Position"**

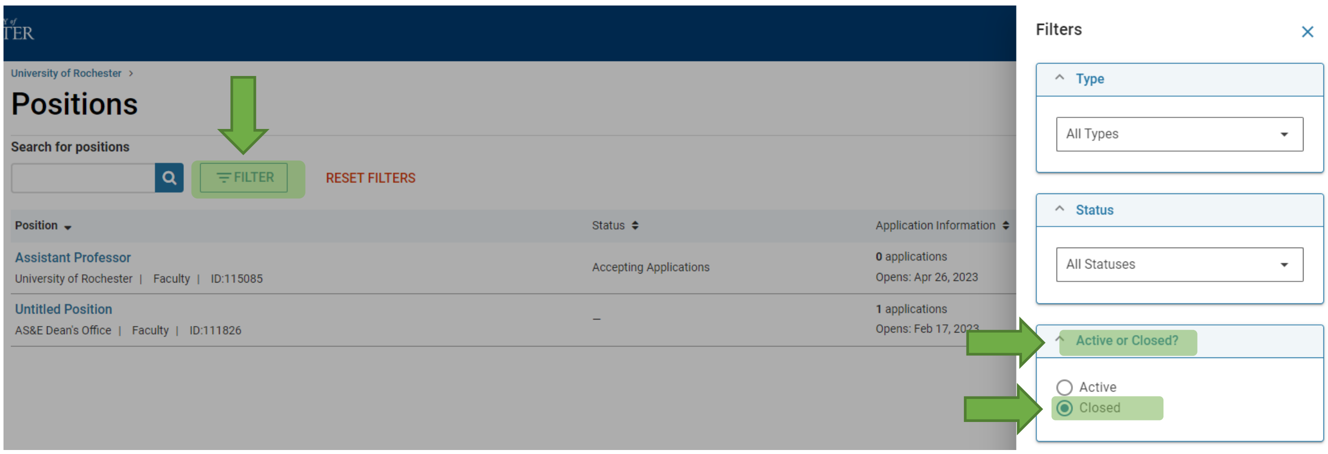


- **The process of having your selected applicant approved for hire starts by closing the position. This will trigger a notification to the Office of Academic Affairs to approve or reject the hire.**

- **If the corresponding position in myURHR is closed, the position status of the UR Faculty position will automatically change to "Closed in myURHR". This is only a position status change for visibility purposes, and does not actually close the position. Closing a position in UR Faculty will need to be done manually by clicking on Position Actions.**

REOPEN A CLOSED POSITION

- **If for some reason you need to reopen a closed position, click on "Filter" and in the pop up window, select "Closed" in the "Active or Closed?" section.**



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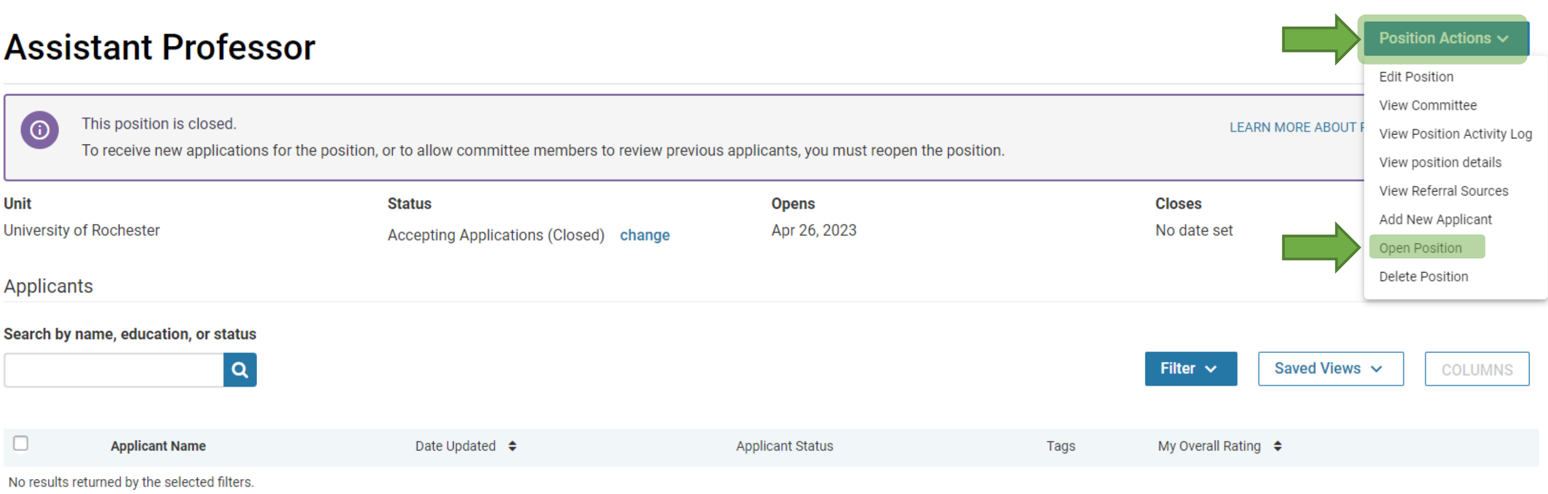
- **Click on the desired position to reopen.**
- **Click on "Position Actions" in the top right corner and click "Open Position"**



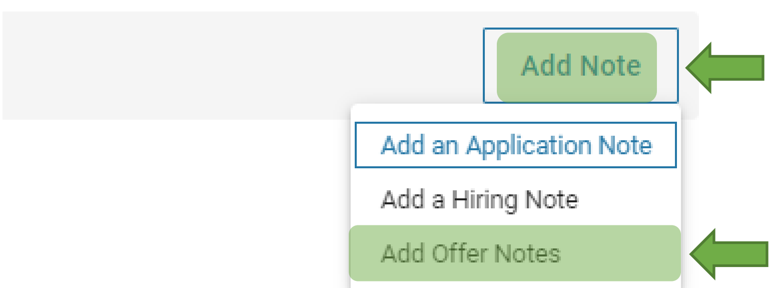
For more information on managing a search, see Interfolio's help site: https://product-help.interfolio.com/en_US/creating-and-managing-applications

Click here for an in-depth training course on Faculty Search for Administrators: https://rise.articulate.com/share/W-GxsP51z-YF0IFRD2r1GbTFlMYyaTma#/

SENDING A HIRE TO MYURHR

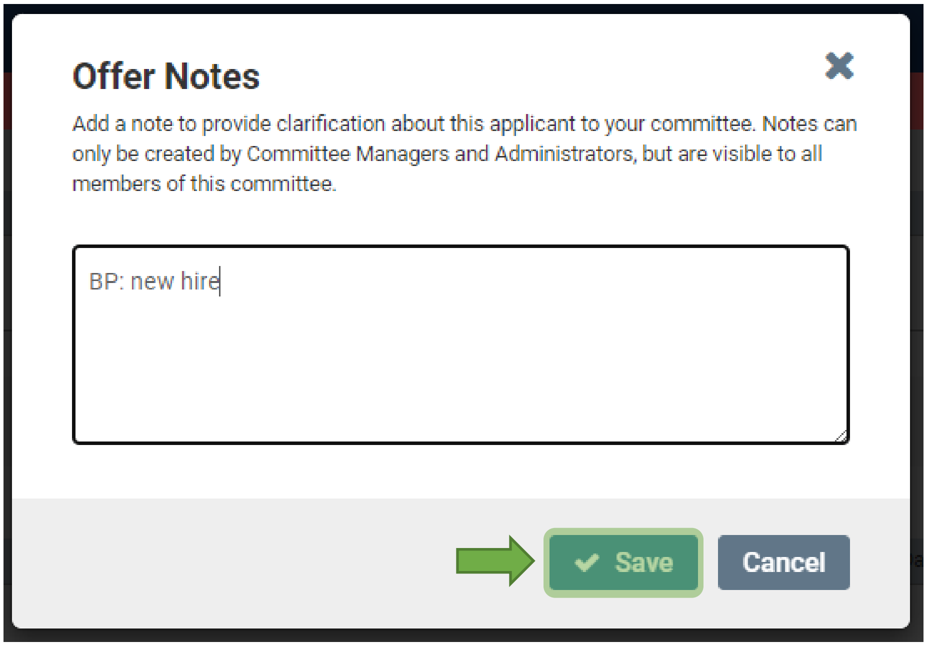
- **An integration has been set up to send a hire directly from UR Faculty to myURHR. There, they will be placed into the position that was initially created to kick off the recruitment process. If the hire will be using a different job code from what was entered into the myURHR position, you will need to first update the myURHR position to reflect this.**
- **Enter the applicant's profile. You can do this even if the position has been closed. (To find a closed position, change the filters on the Positions page to display closed positions).**
- **You will need to indicate which business process should be used in myURHR. Scroll down to the bottom of the applicant's profile and click on "Add Note", then select "Add Offer Note". Enter one of the following business processes (BPs) exactly as it appears here:**
  BP: new hire
  BP: rehire
  BP: add job

Note for transfers: If this is a benefits eligible position that will replace the applicant's current benefits eligible position, then the integration must be bypassed. This will require a business process of "change job", which must be initiated directly in myURHR. Please follow myURHR guidelines to initiate this action in myURHR. If this is done, document the action in UR Faculty by updating the applicant status to "Change Job Manually Initiated in myURHR".

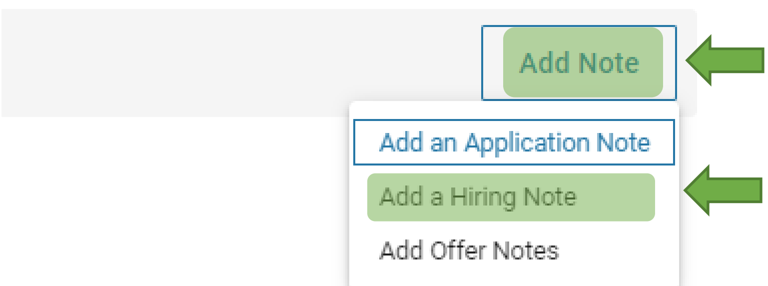


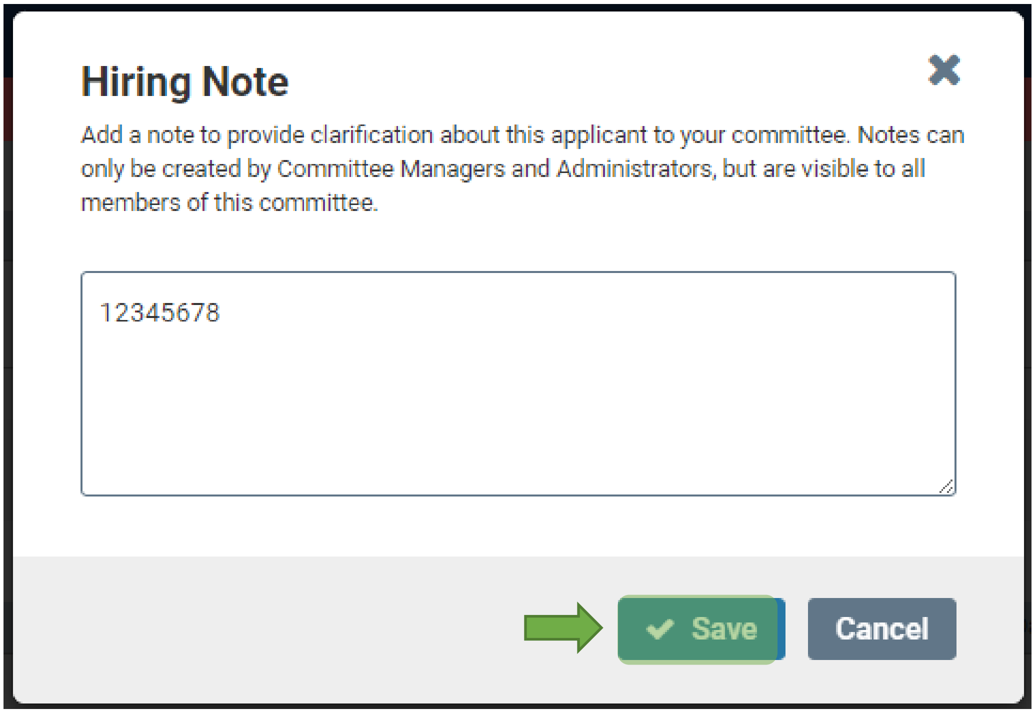
- Note that it is your responsibility to obtain the URID and enter it in Hiring Note if you are trying to send to myURHR a faculty member who has current or previous employment with University of Rochester. If the URID is not included, the hire will not successfully be passed through the integration. To obtain URIDs, you can use University of Rochester's Identity Management database (https://myidentity.rochester.edu/identity/admin/search). If you do not have access to this, please submit a ticket to the University of Rochester's IT Helpdesk.

- **Note for rehires with a name change: if you discover that the applicant you are trying to rehire has had a name change (looking up their information in Identity Management will help you figure this out), you will need to notify Identity Management. Once the integration sends over the hire to myURHR, it will get stuck at the Identity Management step of the process if the hire's identity is not verified. Please enter a support ticket (UnivITHelp@rochester.edu) to alert Identity Management that you are trying to rehire someone with a name change.**

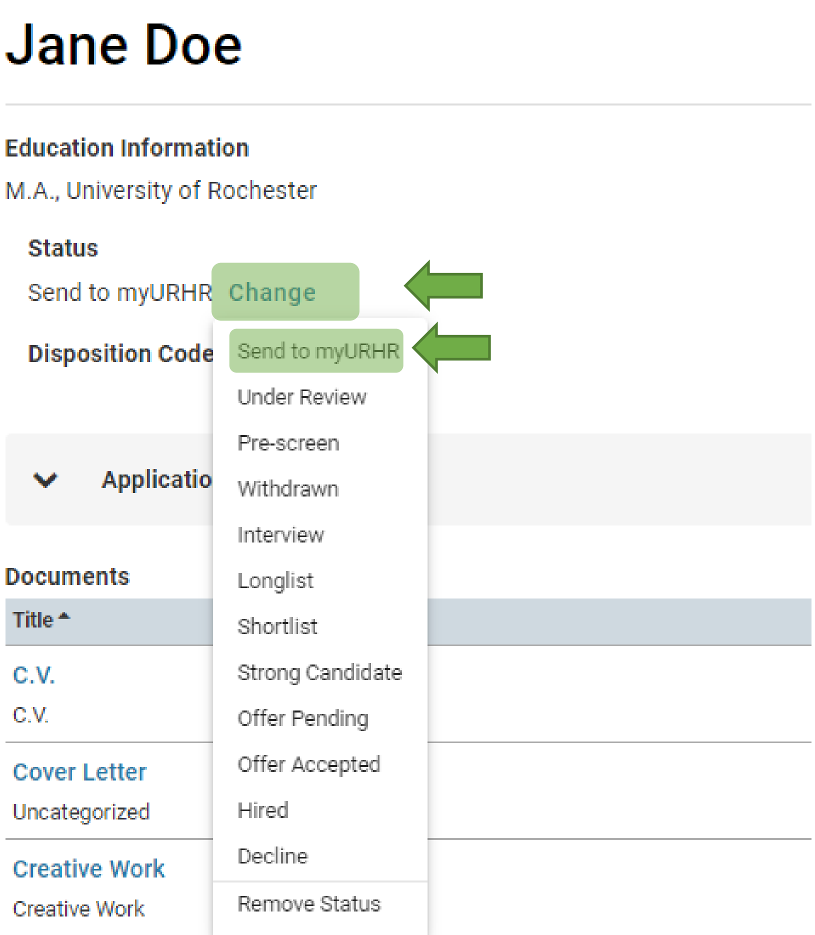


- **If the hire is already affiliated with University of Rochester and has a URID, it will need to be indicated. Click on "Add Note" again and select "Hiring Note". There, enter only the 8 digit URID.**





- **Finally, update the application status to send the hire to myURHR. On the applicant's profile under Status, click on "Change". Note that the application status is different from the position status; the application status is found on the individual applicant's profile. Select the status "Send to myURHR". This triggers the integration to send the hire to myURHR.**
- If you ever need to retrigger the integration (perhaps after making corrections to the applicant's information), click on "Change" next to the status and select "Remove Status". Then set the status to "Send to myURHR" again.



- Note: once the hire is successfully sent to myURHR via the integration, the application status will automatically update to "Successfully sent to myURHR".
- For your reference, here are the definitions of the three business processes that can be used to send hires:
    - BP: new hire - A candidate who does not have an employee/worker record in HRMS or Workday
    - BP: rehire - A candidate with an employee/worker record in HRMS or Workday.
    - BP: add job - The add job process is used to hire an internal candidate into a new position without terminating their current position.

- **WORKDAY STEP: Continue with onboarding your hire in Workday following myURHR instructions. Note: the hire integration from UR Faculty to myURHR runs once an hour.**

Click here for an in-depth training course on Faculty Search for Committee Managers: https://rise.articulate.com/share/zkESWoStzmxsj8TgJzv0XrRfCbQXmvG9#/