

School of Medicine and Dentistry

URFaculty Search Training Guide for Administrators

User Access

You must be included the UR Faculty: Faculty Search database in order to access Faculty Search. If you are not or would 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"

Sign in with your username and password

Username

Password

Domain

UR Active Directory

Sign in

Need help?

© University of Rochester | [Privacy Policy](#)

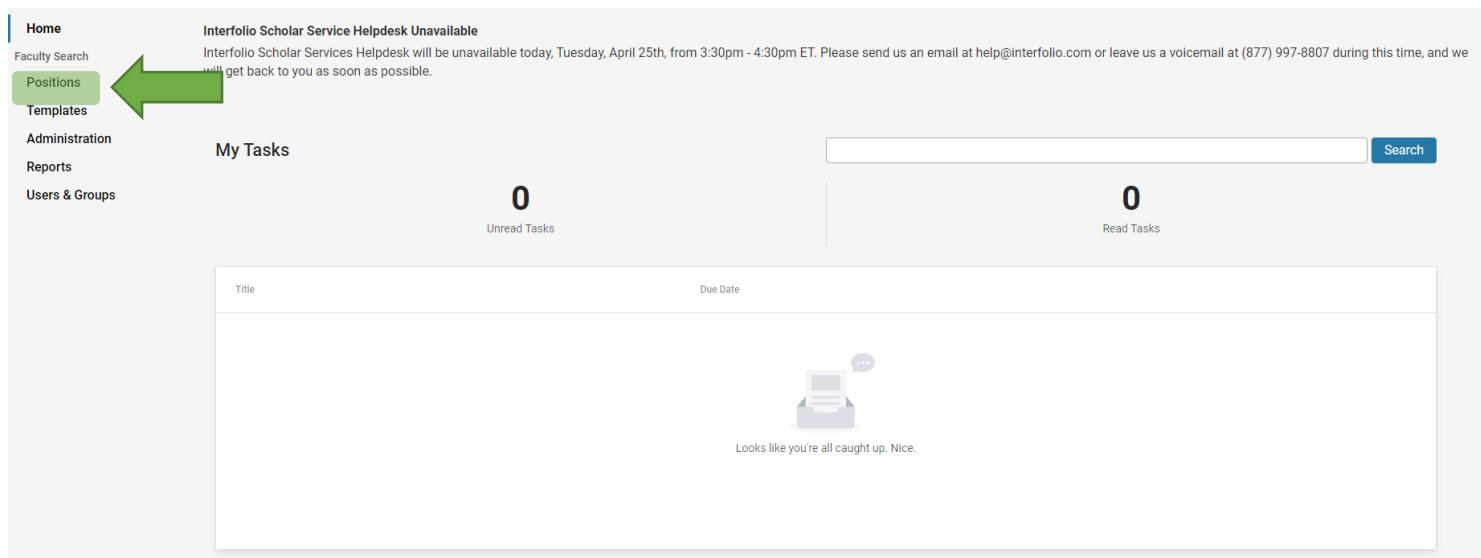
Position Creation/Setting Up a Search

Workday Position Creation

- **WORKDAY STEP:** Create a new position in Workday following myURHR instructions. Ensure that the position is set to send over to UR Faculty. Once approvals have taken place in Workday, the position will integrate to UR Faculty. Note: the position integration from myURHR to UR Faculty runs once an hour.

Set up a Search

- This is your UR Faculty home screen. On the left side menu under Faculty Search, click on “Positions”



- Locate the position you're working on by searching for the name of the position. Click on the position name.

Positions

Search for positions

assistant professor



FILTER

Position ▾

Assistant Professor



University of Rochester Test Site | Faculty | ID:126201

Creating a search with multiple hires

You may post one posting with the purpose of multiple hires on a **very limited basis**, with **approval from OAA**, such as:

1. When the goal is to hire multiple TAR positions in the same department
2. When the goal is to hire multiple individuals of a certain subspecialty – i.e., breast radiologists

When creating a position with multiple openings, Workday gives each one a unique number to identify it:

Awaiting Your Action



Costing Allocation for Create Position: P00047199 ttest multi position-1

My Tasks - 7 minute(s) ago



Costing Allocation for Create Position: P00047198 ttest multi position-2

My Tasks - 7 minute(s) ago



Costing Allocation for Create Position: P00047197 ttest multi position-3

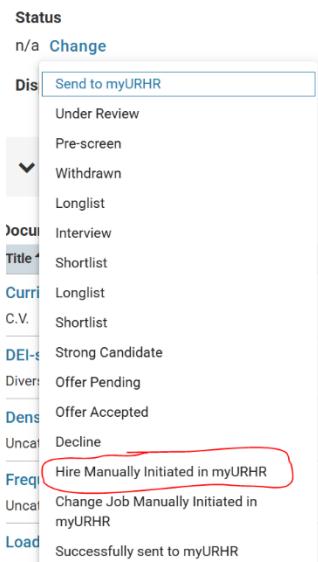
My Tasks - 7 minute(s) ago

- When the admin says yes to the “Send to Faculty Search” then **all three** positions are sent over.
- The department administrator ignores positions 2 and 3 and **only posts position 1 to recruit applicants**.
- All the candidates apply to position 1.
- When the first applicant is identified, use the integration to initiate a hire to position 1.
- The first applicant will have a status of “Successfully sent to myURHR”.
- **For the second applicant**, the admin manually initiates the hire to position 2 in Workday
- In FIS change the applicant’s status to “Hire Manually Initiated in myURHR”.
- Use the offer note on the second applicant to indicate that the search used position number P12345678 but that they were hired into position number P45678900. (This field is normally used to identify the BP to use in Workday, but this will not use the integration, it can be repurposed.)

The same procedure can be used for subsequent applicants.

Steps for the subsequent (manual) hire:

- In UR Faculty, go to Faculty Search
 - Select the position
 - Click on the name of the applicant
 - At the top of the applicant page, change the status of the applicant to “Hire Manually Initiated in myURHR”:



- In myURHR, go to the unfilled position
 - Click on the related actions or (...) next to the Position number
 - Select Hire → Hire Employee.
 - Select Create a New Pre-Hire, then click OK.
 - Add the name and email address of the applicant.
 - Proceed with the Hire BP as usual.

Edit/Create details of a position

Edit the position

- The position will now need to be edited in preparation for publishing. Click on “Position Actions” on the top right and click on “Edit Position”.



Assistant Professor

Unit: University of Rochester
Status: n/a [change](#)
Opens: May 9, 2023
Closes: No date set

Applicants

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
No results returned by the selected filters.				

Search by name, education, or status

Filter Saved View

Position Actions

- Edit Position
- View Committee
- View Position Activity Log
- View position details
- View Referral Sources
- Add New Applicant
- Close Position
- Delete Position

- You should now be on the “Position Summary” page, which shows you all the information about the position as it currently stands. Use the menu on the right side to navigate through each of the sections and make edits.

Position Summary

THIS POSITION IS:

Open to New Applicants

Open Date

Deadline
 Rolling Deadline
 Specific Date

POSITION ADVERTISING:
“Apply Now” page is **not published**

PUBLISH

URL
The position must be published to activate the URL.

POSITION STATUS:
Please set an initial status for your position.
Update Status

EDIT POSITION...

1. Basic Information
2. Required Documents
3. Evaluation Settings
4. Application Forms
5. Search Committee
6. Position Notes

Basic Information

The Basic Information page should be pre-filled with information flowing over from Workday. Please note that any changes to positions made in UR Faculty is subject to additional approval.

- Position Title: integrated from Workday
- Location: integrated from Workday
- Salary Range or Pay Grade: integrated from Workday
 - The salary range integrated from Workday is a generic range – administrators need to update this range based on the actual range entered in Workday per SMD Compensation Committee Guidelines (MFG and SMD).*
- Open Date: integrated from Workday; update if necessary. If the position has citizenship limitations, please include this statement at the end of the description: “The University acknowledges that there may be limited situations where a federal law, regulation, executive order, or government contract requires the University to consider candidates with certain citizenship statuses.”
- Position Description: copy and paste from Workday
- Qualification: copy and paste from Workday
- Application Instructions: copy and paste from Workday. Include the following: “If you already have an Interfolio account, please sign in to apply to this position. If not, please create an Interfolio account. For questions/concerns pertaining to the position, email [committee manager’s email address].” Do not direct applicants to apply external to UR Faculty.
- Advertising Setting (public/private): integrated from Workday; update if necessary

Basic Information

Description & Dates

Position Title *

Assistant Professor

Location *

Rochester NY

Position Type

Faculty

Salary Range or Pay Grade *

e.g. \$80,000 - \$100,000 a year: GS-8

\$80,000 - \$100,000

18/100 characters

Open Data 

3

Deadline

 Rolling Deadline Specific Date

Position Description *

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Qualifications

Digitized by srujanika@gmail.com

body_D

Application Instructions

Digitized by srujanika@gmail.com

body. n.

Equal Opportunity Statement - EOE, including disability/protected veterans

This will populate automatically – do not duplicate or add this language to the position description

The University of Rochester is committed to fostering, cultivating, and preserving an inclusive and welcoming culture to advance the University's Mission to Learn, Discover, Heal, Create – and Make the World Ever Better. In support of our values and those of our society, the University is committed to not discriminating on the basis of age, color, disability, ethnicity, gender identity or expression, genetic information, marital status, military/veteran status, national origin, race, religion/creed, sex, sexual orientation, citizenship status, or any other characteristic protected by federal, state, or local law (Protected Classes). This commitment extends to non-discrimination in the administration of our policies, admissions, employment, access, and recruitment of candidates for all persons consistent with our values and based on applicable law.

Advertising Setting

Advertising Setting

What is the advertising setting for this position? *

[Learn more about the advertising setting](#)

Public, the position will be available for applicants to find and apply online.
 Private, the position will not be discoverable in any public position feeds managed by Interfolio.

Save & Continue



- Click on “Save & Continue”.

Add Required Documents

- Click on “+ Add Requirement”



Required Documents

Assistant Professor

0 Documents Required

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

+ Add Requirement



Additional Applicant Options

Applicants may add additional documents

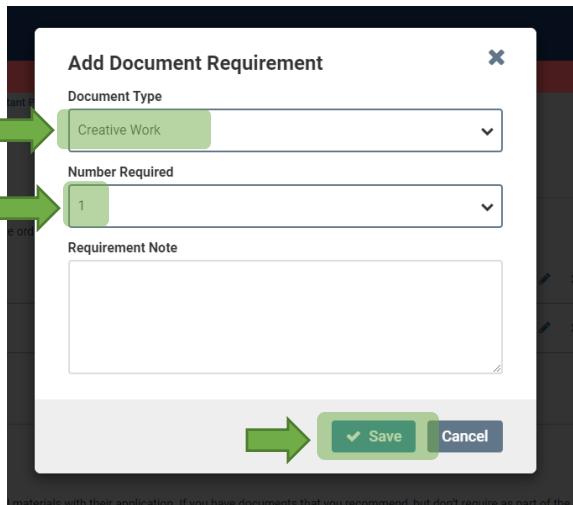
You may give applicants the ability to include additional materials with their application. If you have documents that you recommend, but don't require as part of the application, you should select this choice.

Send a message on application submission.

✓ Save & Continue

Skip Step

- In the pop-up window, select a document type, number of documents required, and a requirement note (optional).
- Click “Save”. Repeat for each required document.



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

- Note on indicating that a document is optional and not required: After adding the document following previous steps, edit the required document and change the number next to it to “0”. This will mean that the document is optional and that applicants may submit their application without meeting this document requirement.
- Note on “Non-confidential Letter of Recommendation or Evaluation” vs. “Confidential Letter of Recommendation or Evaluation”: If you select “Non-confidential Letter of Recommendation or Evaluation”, applicants may upload letters themselves and attach them to their applications. If you select “Confidential Letter of Recommendation or Evaluation”, applicants will be prompted to enter the email addresses of letter writers of their choice. The letter writers will then be prompted by Interfolio to upload the letters. Finally, the letters will get attached to the applications without being visible to the applicants, hence remaining confidential.

Additional Application Options:

- Select the first checkbox to allow applicants to upload additional documents
- Select the second checkbox to send an “application received” message to applicants
- Click on “Insert Message Template” and select “Application Received.” (pre-made template)

- Click “Save & Continue”

Additional Applicant Options

Applicants may add additional documents

You may give applicants the ability to include additional materials with their application. If you have documents that you recommend, but don't require as part of the application, you should select this choice.

Send a message on application submission.

Insert Message Template 

From name *

UR Academic Affairs

Reply to email address *

uracademicaffairs@rochester.edu

Subject *

Application Received.

Body *



Dear %ApplicantName%,

Thank you for submitting your application for %PositionName% in the %UnitName%. We have received your application and will contact you if we have further questions.

The University of Rochester's Academic Affairs Team.





✓ Save & Continue

Skip Step

Identify Evaluation Settings

- Click “+ Add Criterion”

Evaluation Settings

0 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.

+ Add Criterion

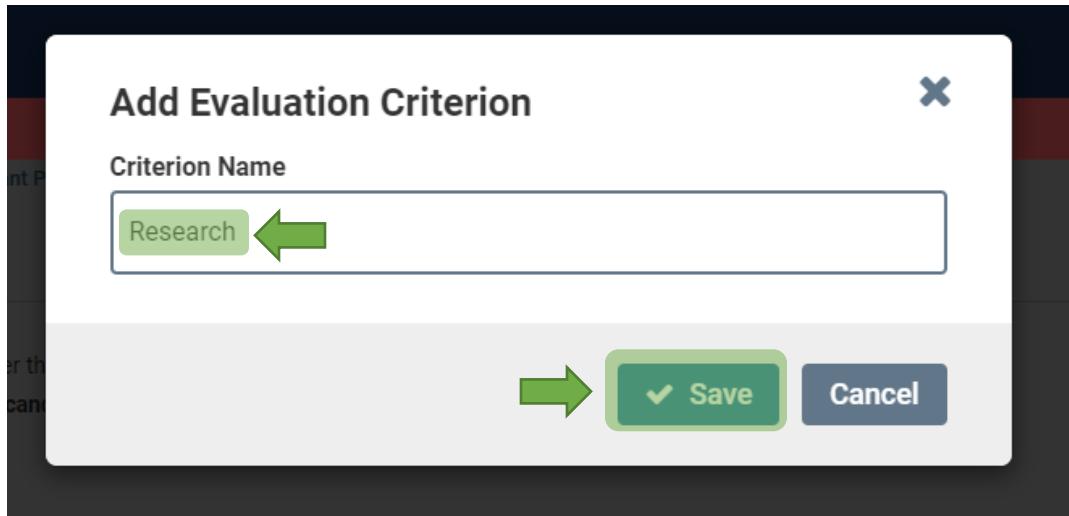
Blind Review

Evaluators should not see others' comments and ratings

✓ Save & Continue

Skip Step

- In the pop-up window, add criterion name.
- Click “save”. Repeat for each criterion.



- Select the checkbox to indicate if evaluators should see each other's comments and ratings
- Click "Save & Continue"

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.

Research

+ Add Criterion

Blind Review

Evaluators should not see others' comments and ratings



✓ Save & Continue

Skip Step

Attach Custom Application Forms

- The University Base Application Form (required) is added by default
- The EEO form (required) is added by default
- If your department has a custom form, attach it here. Otherwise, click on “Save & Continue”

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.

1 Forms Required

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

University Base Application Form [Preview](#) Required X

[+ Add Form](#)

Applicants must complete an Equal Employment Opportunity form

EEO-1/Affirmative Action Voluntary Self Identification Form

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.

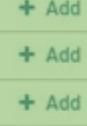
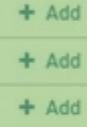
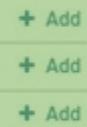
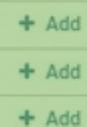
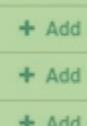
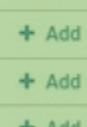
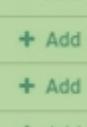
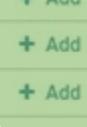
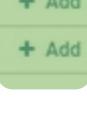
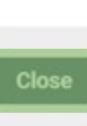
 ✓ Save & Continue Skip Step

Create a Search Committee (this can be edited while a search is underway)

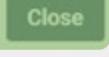
- **Update Committee Manager.** By default the Committee Manager will be set to Rochester API User, referring to the integration which technically created the position for you.
 - Click on the x next to this name, click on “+ Add Manager”, and [search for your own name](#). Click on “+ Add”, and then “Close”. You can also assign someone else as a Committee Manager if you will not be managing this position.
- **Click “+ Add Member” and select user(s) to be added to search committee.** Note that Committee Managers cannot be Evaluators. Note that in order to be assigned as Committee Manager or Evaluator, the user needs to first be in the FIS database. To add 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)
- **Click “Close” when done.**

Add Member

Search Sort by Name ▾

First Name	Last Name	Email	
John	Doe	john.doe@rochester.edu	 + Add
David	Smith	daavid.smith@rochester.edu	 + Add
Michael	Johnson	michael.johnson@rochester.edu	 + Add
Sarah	Wilson	sarah.wilson@rochester.edu	 + Add
Emily	Brown	emily.brown@rochester.edu	 + Add
Robert	Green	robert.green@rochester.edu	 + Add
Anna	White	anna.white@rochester.edu	 + Add
James	Black	james.black@rochester.edu	 + Add
Kevin	Red	kevin.red@rochester.edu	 + Add
David	Blue	daavid.blue@rochester.edu	 + Add
Sarah	Green	sarah.green@rochester.edu	 + Add
Emily	White	emily.white@rochester.edu	 + Add
Robert	Black	robert.black@rochester.edu	 + Add
Anna	Red	anna.red@rochester.edu	 + Add

First Previous **1** 2 3 Next Last

   Close

- **Repeat for “+ Add Manager”.** Note that the user creating a new position is listed as Committee Manager by default. This can be changed by clicking on the “x” adjacent to their name and adding a new manager. To be assigned as Committee Manager or Evaluator, the user needs to be in the FIS database. To add 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)
 - Click on “Save & Continue”

Search Committee

3 Committee Members

Committee Manager	x
Evaluator	x
Evaluator	x

Save & Continue **Skip Step**

Enter Position Notes

- Some information on this page will be data flowing over from Workday, and some will be information for you to complete.

Position ID or Requisition Number: integrated from Workday

Appointment Type: do not use

Rank: job code integrated from Workday

Title: intended functional job title (may be different from the job posting title)

Discipline: for academic units that might have specialties

Position Term Length: note that this is in months

Anticipated Start Date: enter information

Funding Source: enter information

Hiring Plan: note if this is a part of a cluster hire, etc.

General Notes: SEE BELOW Provide answers to the following two questions for the finance team to review:

1. Is this position > 25% research?
2. Is there a startup package associated with this position?

Also, if there is a recruitment form associated with this position, please enter that information here.

- Click "Save & Continue"
- Enter the following information to receive financial review:
 1. In **Position Details** section a. Salary Range or Pay Grade
 2. In application instructions section: a. Pay range language required (see below)
 3. In Position Notes Section: (This is an internal section, not public facing)
 - a. General Notes field: Provide answers to the following questions (required)
 - i. Is this position >25% research?
 - ii. Is there a startup package associated with this position?
 - b. Position ID or Requisition Number field: If there is a Recruitment Form, enter # Click "Save and Continue"

Pay rate language: The referenced pay range represents the University's good faith and reasonable estimate of the base range of compensation for this faculty position. Individual salaries will be determined within the job's salary range and established based on (but not limited to) market data, experience and expertise of the individual, and with consideration to related position salaries. Alignment of clinical incentive-based compensation may also be applicable and will be discussed during the hiring process.

Position Notes

Public Facing Notes

Your Institutional Administrators have enabled visibility of the salary field. Any information entered on this screen is public and available to all applicants for all positions created within University of Rochester.

Salary Range or Pay Grade *

e.g., \$80,000 - \$100,000 a year; GS-8

18/100 characters

Internal Notes

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

Discipline

Position Term Length

1-120 months

 Month(s)

Anticipated Start Date



Funding Source

e.g., Vice-President's Office; Grant Foundation

Hiring Plan

Cluster hire

body p

General Notes

Submit for Approval

- Approval templates have been created to allow the Office of Academic Affairs and the finance team to review and approve before a posting can be published.
- Click on “Submit for Approval”.
- The **FIRST** approval required is department administrator approval. The system will send an approval request to all administrators that are on the approval template for the Department/Unit, but only one individual will need to approve the posting.
- This approval step allows the search to be returned to a department administrator, and not the system API user. This alleviates the need to request or receive additional information outside the FIS in email.
- The **administrator must approve the position** so that it moves to the next approval step.
- **SMD Finance** will receive an email prompting review and approval.
- Following SMD Finance approval, **SMD OAA** will be prompted to review and approve the posting submission.

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

University of Rochester

Position Type

Position

Position Title

—

Salary Range or Pay Grade

\$80,000 - \$100,000

Location

Rochester, NY

Set Initial Position Status

- Once a position has been approved by both the finance team and the Office of Academic Affairs, you will receive an email confirmation.

- The email will lead you to the below screen. Click on “Position Actions” dropdown at the top right and select “Edit Position”

Assistant Professor

Unit: University of Rochester Status: n/a [change](#) Opens: May 9, 2023 Closes: No date set

Applicants

Search by name, education, or status [Filter](#) [Saved View](#)

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
No results returned by the selected filters.				

- Click on “Update Status”

Position Summary

THIS POSITION IS: [?](#)

Open to New Applicants

Open Date * [Calendar](#)

Deadline Rolling Deadline Specific Date

POSITION ADVERTISING: [?](#)
“Apply Now” page is not published

[PUBLISH](#)

URL [The position must be published to activate the URL.](#)

POSITION STATUS: [?](#)
Please set an initial status for your position.

[Update Status](#)

EDIT POSITION... [Basic Information](#) [Required Documents](#) [Evaluation Settings](#) [Application Forms](#) [Search Committee](#) [Position Notes](#)

- Set the position status from the drop down menu
- Set the position settings by selecting the checkboxes
- Click “Save”

POSITION STATUS: [?](#)
Please set an initial status for your position.

Change Position Status

Position Status [Accepting Applications](#) [▼](#)

Position Settings

Applicants can view this status when it is active.
 Applicants can update their application materials while this status is active.
 Evaluators can review applications while this status is active.

[SAVE](#) [CANCEL](#)

Publish Position

- Publish position by clicking on “Publish”. Please note that the posting is not live until you click on “Publish”.

Position Summary

THIS POSITION IS: 

Open to New Applicants

Open Date 

POSITION STATUS: 

Please set an initial status for your position.

[Update Status](#)

Deadline

Rolling Deadline
 Specific Date

POSITION ADVERTISING:

"Apply Now" page is **not published**

[PUBLISH](#)



URL
The position must be published to activate the URL.

Position Details

Basic Information [Edit](#)

Description & Dates

Unit

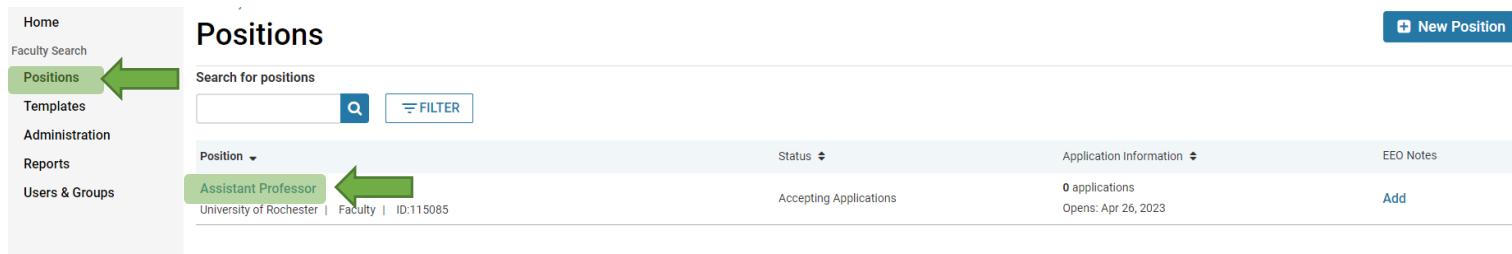
University of Rochester

- Once a position has been published, copy the URL displayed under "URL". Include this URL in your job posting advertisement to direct applicants to apply via Interfolio.

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

Edit an Existing 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



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Faculty Search

Positions 

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Positions

[New Position](#)

Search for positions  

Position	Status	Application Information	EEO Notes
Assistant Professor 	Accepting Applications	0 applications Opens: Apr 26, 2023	Add

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

Assistant Professor

Unit University of Rochester	Status Accepting Applications change	Opens Apr 26, 2023	Closes No date set
Applicants			
<p>Search by name, education, or status <input type="text"/> </p> <p>Filter ▾ Saved Views</p>			
<input type="checkbox"/> Applicant Name	Date Updated ▾	Applicant Status	Tags
No results returned by the selected filters.			

- Position Actions ▾
- [Edit Position](#)
- [View Committee](#)
- [View Position Activity Log](#)
- [View position details](#)
- [View Referral Sources](#)
- [Add New Applicant](#)
- [Close Position](#)
- [Delete Position](#)

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

Position Summary

THIS POSITION IS: 	POSITION STATUS: 	EDIT POSITION...
Open to New Applicants		
Open Date *	Accepting Applications	
<input type="text" value="4/26/2023"/> 	<i>With this status active:</i>	
Deadline	<ul style="list-style-type: none">Applicants can view this status.Applicants can update their application materials.Evaluators can review applications to this position.	
<input checked="" type="radio"/> Rolling Deadline	change	
<input type="radio"/> Specific Date		
POSITION ADVERTISING:		
“Apply Now” page is not published		
PUBLISH		

URL
The position must be published to activate the URL.

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

 [Basic Information](#)

[Required Documents](#)

[Evaluation Settings](#)

[Application Forms](#)

[Search Committee](#)

[Position Notes](#)

Set 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”

Home
Faculty Search
Positions
Templates
Administration
Reports
Users & Groups

Interfolio Scholar Service Helpdesk Unavailable
Interfolio Scholar Services Helpdesk will be unavailable today, Tuesday, April 25th, from 3:30pm - 4:30pm ET. Please send us an email at help@interfolio.com or leave us a voicemail at (877) 997-8807 during this time, and we will get back to you as soon as possible.

My Tasks

0 Unread Tasks 0 Read Tasks

Looks like you're all caught up. Nice.

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

Users, Units & Titles

Users Units Titles

Search for users 

[Download User list](#) [+ Add User](#)

User	Role & Unit	Additional Permissions	Actions
Carrie Anderson View Profile	Administrator University of Rochester	-	
Brookhaven AdminUser View Profile	Administrator University of Rochester	-	
Kimberly Bruckman View Profile	Administrator School of Medicine and Dentistry	-	
Matthew Bruckman View Profile	Administrator Office of the Provost	-	
Tanya Bullock View Profile	Administrator College of Arts, Sciences & Engineering	-	
Caroline Carter View Profile	Administrator University of Rochester	-	
Stephanie Cawthon View Profile	Administrator Simon Business School	-	
Charles Devereux View Profile	Administrator University of Rochester	-	

- Under "Permissions", click on "+ Add Role"

Edit User

First Name * Last Name *

Email *

Single Sign On If checked, this user will need to sign on using their institutional credentials.

Update **Cancel**

Permissions **SSO Identifier**

Role
A user's role determines their capabilities in the program. [Learn more about User Roles.](#)

Role	Unit	Actions
Administrator	University of Rochester	Remove

+ Add Role 

Title
A title can be assigned to the unit of the administrator's current role or a unit below. [Learn more about titles.](#)

Title	Unit	Actions

+ Add Title

Options 

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

Edit User

First Name * Last Name *

Email *

Single Sign On If checked, this user will need to sign on using their institutional credentials.

Update **Cancel**

Permissions **SSO Identifier**

Role
A user's role determines their capabilities in the program. [Learn more about User Roles.](#)

Unit * 

Role * 

Save **Cancel** 

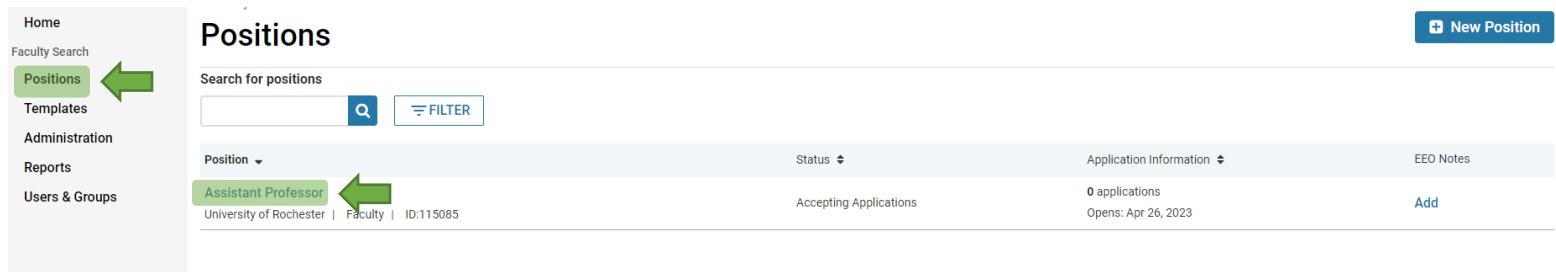
Options 

- 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.

Manage a Search

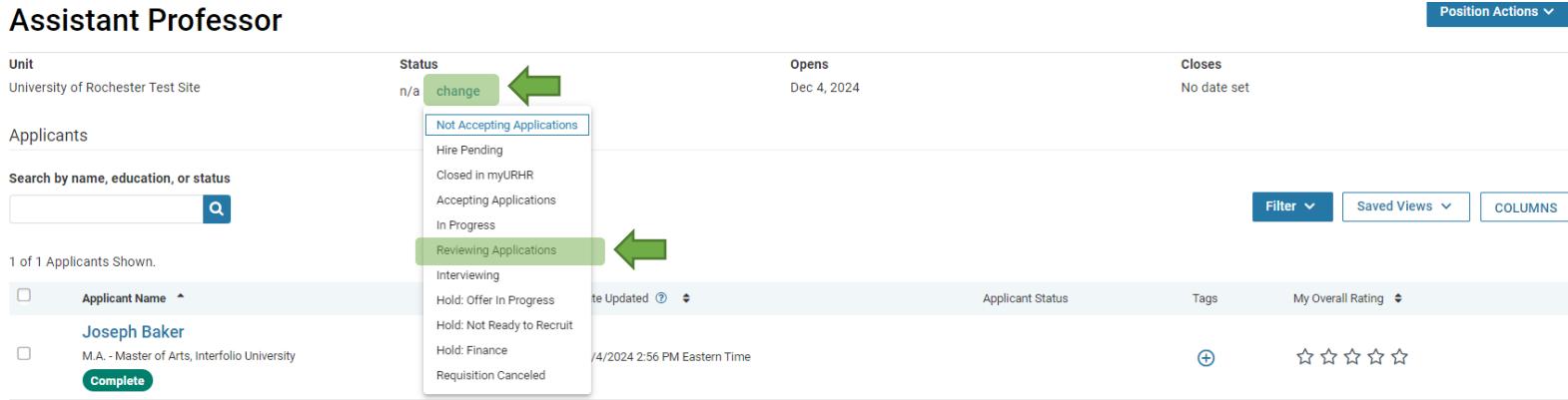
Change Position Status

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



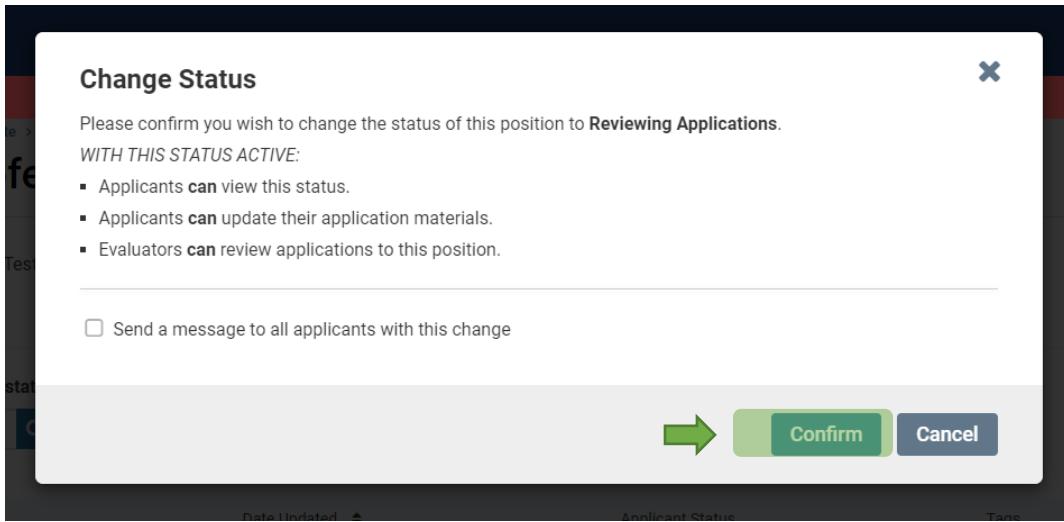
The screenshot shows the UR Faculty home screen. On the left, a vertical menu includes 'Home', 'Faculty Search', 'Positions' (which is highlighted with a green arrow), 'Templates', 'Administration', 'Reports', and 'Users & Groups'. The main content area is titled 'Positions' with a 'New Position' button. It features a search bar and a 'FILTER' button. Below the search is a table with columns for 'Position', 'Status', 'Application Information', and 'EEO Notes'. A specific position is selected: 'Assistant Professor' at 'University of Rochester' (Faculty, ID:115085), which is currently 'Accepting Applications'. The status is listed as '0 applications' and 'Opens: Apr 26, 2023'.

- 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).
-



The screenshot shows the 'Assistant Professor' position profile page. The 'Status' field is currently set to 'n/a' and has a 'change' button. A green arrow points to this button. A dropdown menu is open, showing options: 'Not Accepting Applications', 'Hire Pending', 'Closed in myURHR', 'Accepting Applications', 'In Progress', 'Interviewing', 'Hold: Offer In Progress', 'Hold: Not Ready to Recruit', 'Hold: Finance', and 'Requisition Canceled'. The 'Accepting Applications' option is highlighted with a green arrow. The page also shows the 'Opens' date as 'Dec 4, 2024' and the 'Closes' date as 'No date set'. The 'Applicants' section shows 1 of 1 applicants, with a list for 'Joseph Baker' (M.A. - Master of Arts, Interfolio University) and a 'Complete' button. The top right of the page has 'Position Actions' and other navigation buttons.

- 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.

Joseph Baker

Education Information

M.A., Interfolio University

Status

n/a **Change**



Dis **Under Review**

Add

Tags

+ Add

Pre-screen

Withdrawn

Interview

Longlist

Shortlist

Strong Candidate

Offer Pending

Offer Accepted

Send to myURHR

Decline

Remove Status

Form

Title

University

13 Questions

Comments

Attachments

Events

Tags

Links

Notes

Comments

Attachments

Events

Tags

Links

Notes

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”

Assistant Professor

Position Actions ▾

Unit	Status	Opens	Closes
University of Rochester FS/LM Test Site	Reviewing Applications change	Apr 26, 2023	No date set

Applicants

Search by name, education, or status 

[M.A. - Master of Arts](#)  





[Filter ▾](#) [Saved Views ▾](#) [COLUMNS ▾](#)

HIGHEST DEGREE EARNED: M.A. - Master of Arts

APPLICATION STATUS: No choices available.

TAGS: No choices available.

PROGRESS: Complete

RATINGS: My Rating 

ARCHIVED: Yes No

[Filter by Form Responses](#)

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.

Jane Doe

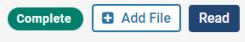
Actions ▾

Education Information
M.A., University of Rochester

Status
n/a [Change](#)

Disposition Code [+ Add](#)



Application [Complete](#) [+ Add File](#) [Read](#)

Documents

Title	Date	Actions
C.V.	May 1, 2023	Download
C.V.		
Cover Letter	May 9, 2023	Download
Uncategorized		
Creative Work	May 1, 2023	Download
Creative Work		

Forms

Title
University Base Application Form
20 Questions

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”

Assistant Professor

Position Actions ▾

Unit	Status	Opens	Closes
University of Rochester FS/LM Test Site	Reviewing Applications change	Apr 26, 2023	No date set

Applicants

Search by name, education, or status 

1 of 1 Applicants Shown. 

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating			
Jane Doe  Complete	05/01/23 01:16 PM EDT	 EMAIL	 STATUS	 TAG	 + DISPOSITION CODE	 DOWNLOAD	 ARCHIVE

- 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”.

Jane Doe

Education Information
M.A., University of Rochester

Status
n/a [Change](#)

Disposition Code [+ Add](#)

Tags [+ Add](#)

Share application
Email applicant  [Email applicant](#)
Download Application PDF
Download Application ZIP
Mark application incomplete
Request recommendation
Send to Appointment Management (a...)

[Complete](#) [+ Add File](#) [Read](#)

 Application

Request letter of recommendation on behalf of applicant

- From the applicant’s profile, click “Actions” from the top right menu, and click “Request recommendation”



Education Information

M.A., University of Rochester

Status

n/a [Change](#)Disposition Code [+ Add](#)

Tags

[+ Add](#)[Share application](#)[Email applicant](#)[Download Application PDF](#)[Download Application ZIP](#)[Mark application incomplete](#)[Request recommendation](#)[Send to Appointment Management \(a...\)](#)[Application](#)[Complete](#)[+ Add File](#)[Read](#)

Documents

Title ^	Date ^	Actions
C.V.	May 1, 2023	Download
C.V.	May 1, 2023	Download
Cover Letter	May 1, 2023	Download
Cover Letter	May 1, 2023	Download
Creative Work	May 1, 2023	Download
Creative Work	May 1, 2023	Download

Forms

[Title ^](#)[University Base Application Form](#)

20 Questions

- 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”

Assistant Professor

Position Actions ▾

Unit	Status	Opens	Closes										
University of Rochester FS/LM Test Site	Reviewing Applications change	Apr 26, 2023	No date set										
Applicants													
Search by name, education, or status <input type="text"/>													
Filter ▾ Saved Views ▾ UMNS													
1 of 1 Applicants Shown.													
<table> <thead> <tr> <th>Applicant Name ^</th> <th>Date Updated ^</th> <th>Applicant Status</th> <th>Tags</th> <th>My Overall Rating ^</th> </tr> </thead> <tbody> <tr> <td>Jane Doe</td> <td>05/01/23 01:16 PM EDT</td> <td>Complete</td> <td></td> <td></td> </tr> </tbody> </table>				Applicant Name ^	Date Updated ^	Applicant Status	Tags	My Overall Rating ^	Jane Doe	05/01/23 01:16 PM EDT	Complete		
Applicant Name ^	Date Updated ^	Applicant Status	Tags	My Overall Rating ^									
Jane Doe	05/01/23 01:16 PM EDT	Complete											

- 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”

Applicants

Search by name, education, or status

HIGHEST DEGREE EARNED:

 M.A. - Master of Arts

APPLICATION STATUS:

No choices available.

TAGS:

 strong publications

PROGRESS:

 Complete
 Incomplete

RATINGS:

 My Rating

No Rating

ARCHIVED:

 Yes No

2 Applicants Shown.

Applicant Name

Jane Doe

M.A. - Master of Arts, University of Rochester

05/01/23 01:16 PM EDT



Ending a Search - 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"

Assistant Professor

Unit

University of Rochester FS/LM Test Site

Status

Reviewing Applications

Opens

Apr 26, 2023

Closes

No date set

Applicants

Search by name, education, or status

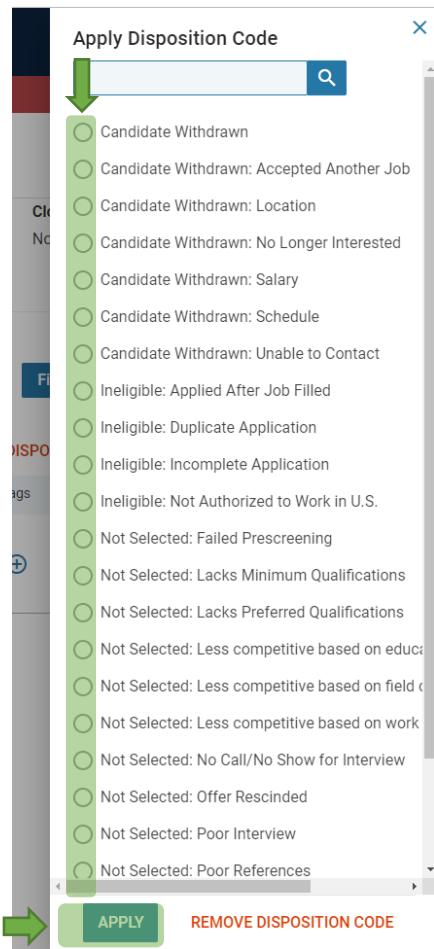
1 of 1 Applicants Shown.

Jane Doe

M.A. - Master of Arts, University of Rochester

05/01/23 01:16 PM EDT

- 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"

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.”

Assistant Professor

Unit: University of Rochester FS/LM Test Site Status: Reviewing Applications [change](#) Opens: Apr 26, 2023 Closes: No date set

Applicants

Search by name, education, or status 

1 of 1 Applicants Shown.

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	Jane Doe	05/01/23 01:16 PM EDT	     		

- 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”

Closing Position

Was an applicant selected?

Yes
 No



Select Applicant(s)

You must select at least one applicant to continue.

 Add Applicant

- 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 moving the action to myURHR or reject.
 - If a final offer letter with dean signature is on file, OAA will approve advancing to the next step.
 - This will approve the action moving to myURHR only—not approval for the hire itself.
- 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.

University of Rochester > **Positions**

Search for positions **FILTER** **RESET FILTERS**

Position	Status	Application Information
Assistant Professor University of Rochester Faculty ID:115085	Accepting Applications	0 applications Opens: Apr 26, 2023
Untitled Position AS&E Dean's Office Faculty ID:111826	—	1 applications Opens: Feb 17, 2023

Filters

- Type: All Types
- Status: All Statuses
- Active or Closed? (Active is unselected, Closed is selected)

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

Assistant Professor

This position is closed. To receive new applications for the position, or to allow committee members to review previous applicants, you must reopen the position. [LEARN MORE ABOUT POSITION](#)

Unit	Status	Opens	Closes
University of Rochester	Accepting Applications (Closed) change	Apr 26, 2023	No date set

Applicants

Search by name, education, or status **Filter** **Saved Views** **COLUMNS**

<input type="checkbox"/> Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
No results returned by the selected filters.				

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-YF0IFRD2r1GbTFIMYyaTma#/>

Send hire to myURHR

- An integration is 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

- 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 a previous record with UR in IDM – either as student or employee
- BP: rehire - A candidate with an employee/worker record in IDM.
- BP: add job - The add job process is used to hire an internal candidate into a new position in addition to their current position.

Hire into a position that was created in URFaculty BEFORE my URHR launch, (i.e. before Dec 16, 2024)

- Create position in Workday, but DO NOT select the option to send the position to URFaculty Search. Once the position goes through the approval process in Workday, move to the next step
- In URFaculty Search, locate the existing position. Edit the position and go to the Position Notes/Internal Notes section. In the Position ID or Requisition Number field, enter the Workday Position ID number (do not enter any other values in this box).

Internal Notes

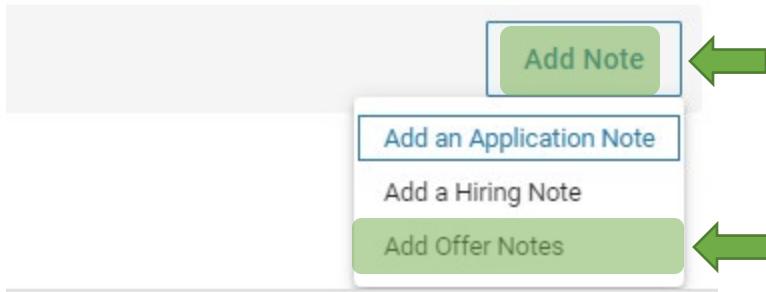
Any information entered on this screen remains private to users at your institution and will never be seen by applicants.

Position ID or Requisition Number

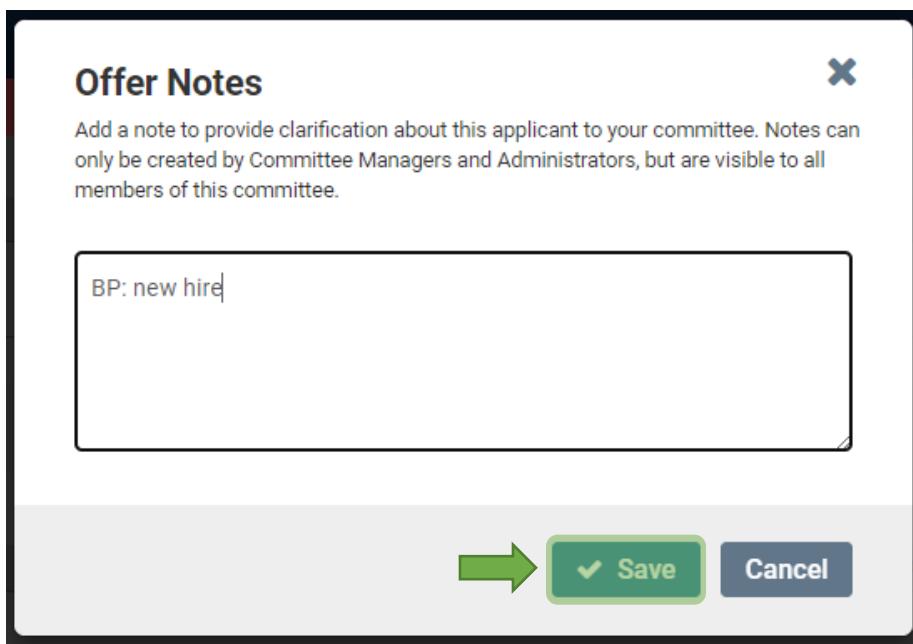
P00034870

Go the applicant profile for the hire. In the Notes section, enter the business process in Offer Note (BP: new hire, BP: rehire or BP: add job). If the hire already has a URID, enter it in Hiring Note.

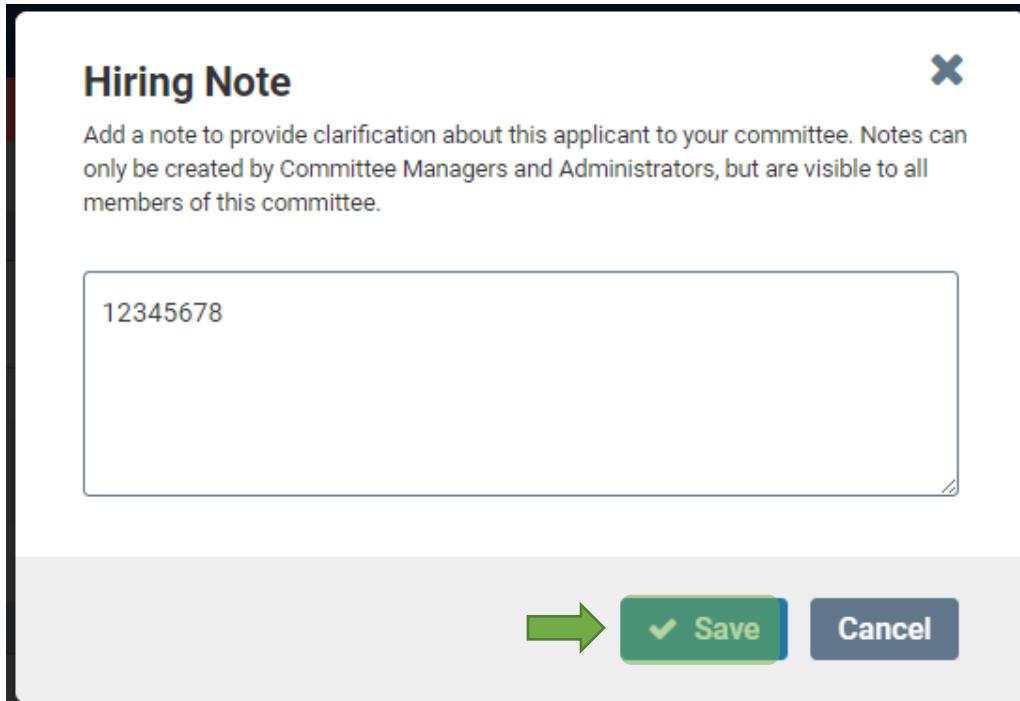
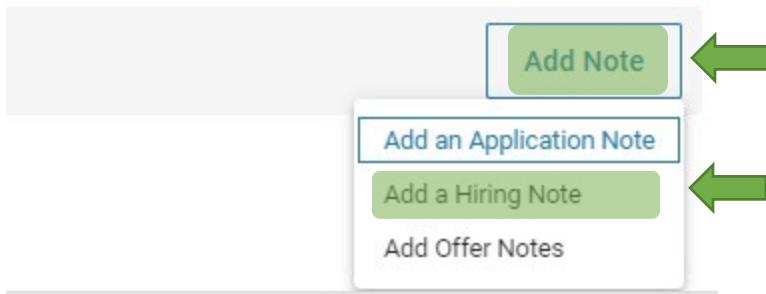
Transfers: If this is a benefits eligible position that will replace the applicant's current benefits eligible position, then the integration must be bypassed. This will require a business process of "change job", which must be initiated directly in myURHR. Please follow myURHR guidelines to initiate 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".



- 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.

Jane Doe

Education Information

M.A., University of Rochester

Status

Send to myURHR **Change** 

Disposition Code **Send to myURHR** 

Under Review

Pre-screen

Withdrawn

Interview

Longlist

Shortlist

Application

Strong Candidate

Offer Pending

Offer Accepted

Hired

Decline

Documents

Title 

C.V.

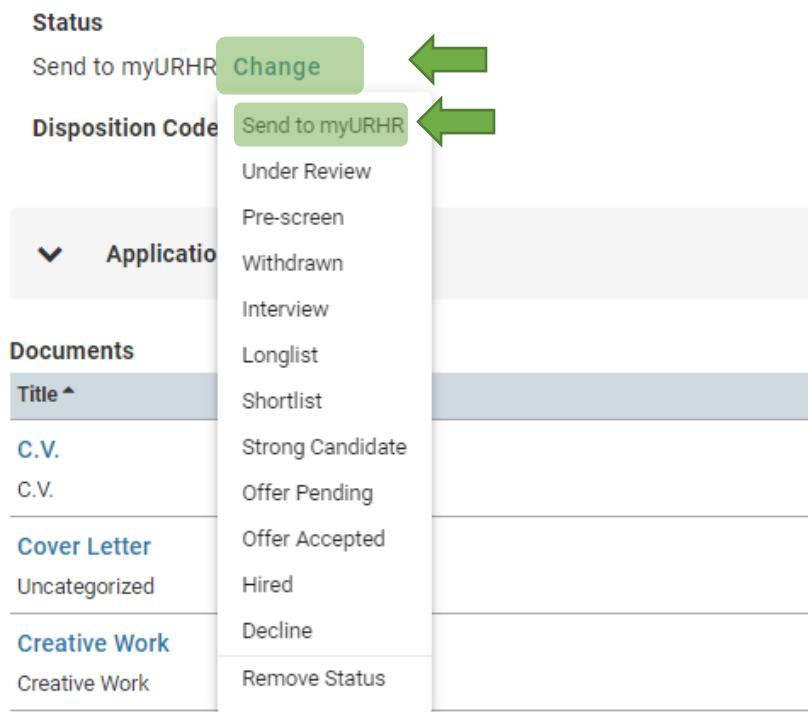
C.V.

Cover Letter

Uncategorized

Creative Work

Creative Work 



- Note: once the hire is successfully sent to myURHR via the integration, the application status will automatically update to “Successfully sent to myURHR”.
- **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 Administrators: <https://rise.articulate.com/share/W-GxsP51z-YFOIFRD2r1GbTFIMYyaTma#/>