

## **FACULTY SEARCH TRAINING GUIDE FOR ADMINISTRATOR**

### *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](mailto: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](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](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?](#)

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## SET UP A SEARCH

- **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 flow over to UR Faculty. Note: the position integration from myURHR to UR Faculty runs once an hour.
- This is your UR Faculty home screen. On the left side menu under Faculty Search, click on “Positions”

Home

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.

Faculty Search

Positions ←

Templates

Administration

Reports

Users & Groups

My Tasks

0 Unread Tasks

0 Read Tasks

Search

Title Due Date

Looks like you're all caught up. Nice.

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

[University of Rochester Test Site](#) >

## Positions

Search for positions

assistant professor | 🔍 FILTER

Position ▾

Assistant Professor ←

University of Rochester Test Site | Faculty | ID:126201

## EDIT YOUR 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	Status	Opens	Closes
University of Rochester	n/a <a href="#">change</a>	May 9, 2023	No date set

Applicants

Search by name, education, or status

Position Actions

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

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

- 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:	POSITION STATUS:
<b>Open to New Applicants</b>	Please set an initial status for your position.
Open Date * <input type="text" value="4/26/2023"/>	<input type="button" value="Update Status"/>
Deadline <input checked="" type="radio"/> Rolling Deadline <input type="radio"/> Specific Date	
POSITION ADVERTISING: "Apply Now" page is <b>not published</b>	
<input type="button" value="PUBLISH"/>	
URL The position must be published to activate the URL.	

EDIT POSITION...

- Basic Information
- Required Documents
- Evaluation Settings
- Application Forms
- Search Committee
- 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*

*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 Date \*

Apr 26, 2023



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

Rich text editor toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Image, Link, Unlink, Omega.

Text: 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.

body p

## Application Instructions

Rich text editor toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Image, Link, Unlink, Omega.

Text: 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.

body p

## Equal Employment Opportunity Statement

The University of Rochester is committed to fostering, cultivating, and preserving a culture of equity, diversity, and inclusion 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 status protected by law. This commitment extends to the administration of our policies, admissions, employment, access, and recruitment of candidates from underrepresented populations, veterans, and persons with disabilities consistent with these values and government contractor Affirmative Action obligations.

## 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

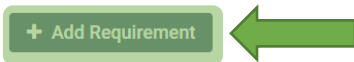
- Click on “+ Add Requirement”

## 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.



### Additional Applicant Options

- Applicants may add additional documents

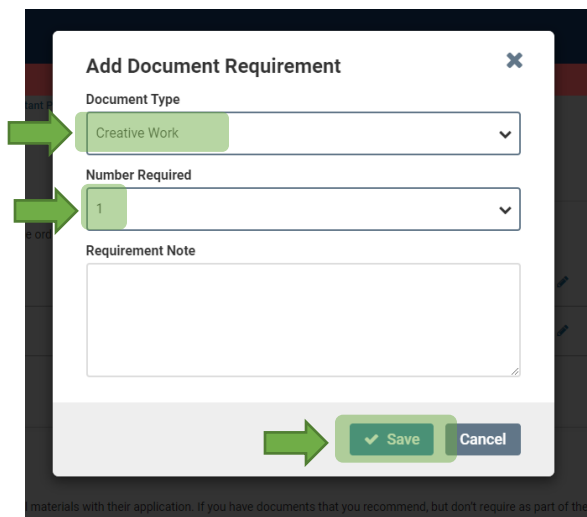
You may give applicants the ability to include additional materials with their application. If you have documents that you recommend, but don't require as part of the application, you should select this choice.

- 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.



- **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.



## IDENTIFY EVALUATION SETTINGS

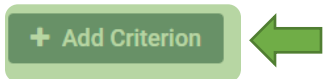
- Click "+ Add Criterion"

# 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.

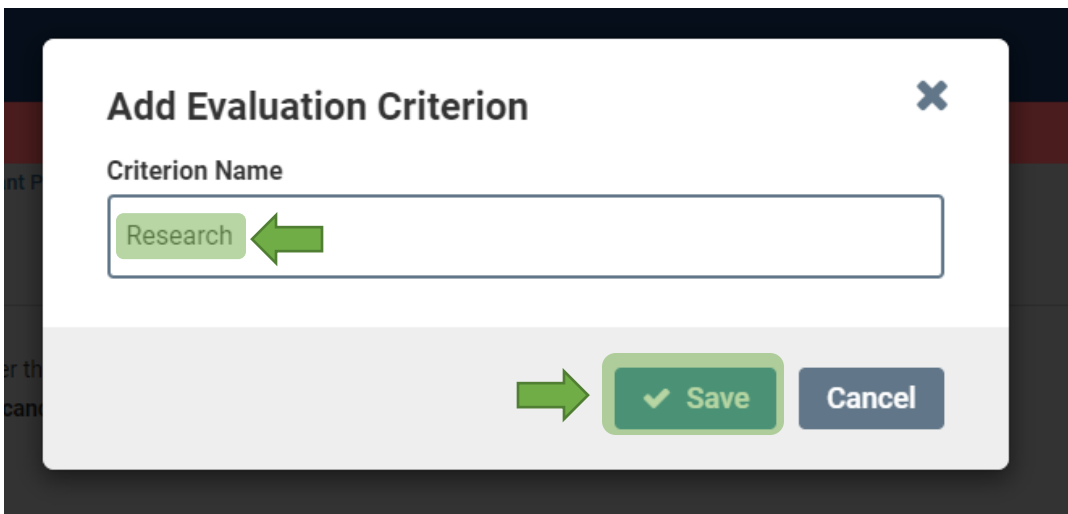


Blind Review

- Evaluators should not see others' comments and ratings



- 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](mailto: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.**

The screenshot shows the 'Add Member' interface. At the top, there is a search bar with a magnifying glass icon and the text 'Search'. To the right of the search bar is a dropdown menu labeled 'Sort by Name'. Below the search bar is a table with three columns: 'First Name', 'Last Name', and 'Email'. The table contains several rows of user information. To the right of each row is a green button with a white plus sign and the text '+ Add'. A green arrow points down to the first '+ Add' button. At the bottom of the table is a pagination control with buttons for 'First', 'Previous', '1', '2', '3', 'Next', and 'Last'. The '1' button is highlighted. At the bottom right of the interface is a green button with a white right-pointing arrow and the text '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. 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](mailto: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: **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"**

## 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

\$80,000 - \$100,000

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

12345

Appointment Type

– Select Appointment Type –

Rank

e.g., Associate Professor, Lecturer

0005

Title

e.g., Visiting, Clinical, Research

Assistant Professor

Discipline

Spanish

Position Term Length

1-120 months

24   Month(s)

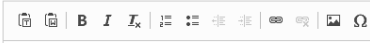
Anticipated Start Date

May 26, 2023  

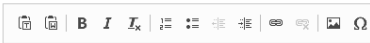
Funding Source

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 give approval before a posting can be published.
- Click on **“Submit for Approval”**. This will send an email to the finance team prompting them to approve/send back the posting (you can also include a personal message). Once approved by the finance team, the Office of Academic Affairs will also be prompted to approve.

# 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

<b>Unit</b> University of Rochester	<b>Status</b> n/a <a href="#">change</a>	<b>Opens</b> May 9, 2023	<b>Closes</b> No date set
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**Applicants**

Search by name, education, or status

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

- Click on "Update Status"

## Position Summary

THIS POSITION IS: **Open to New Applicants**

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

Open Date: 4/26/2023

Deadline:  Rolling Deadline  Specific Date

POSITION ADVERTISING: "Apply Now" page is not published

URL: The position must be published to activate the URL.

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

## 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 \*

4/26/2023 

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**

## 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](https://product-help.interfolio.com/en_US/creating-and-managing-positions/create-a-position)

# 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

Home  
Faculty Search  
Positions  
Templates  
Administration  
Reports  
Users & Groups

### Positions

Search for positions

Position Status Application Information EEO Notes

Assistant Professor	Accepting Applications	0 applications Opens: Apr 26, 2023	Add
---------------------	------------------------	---------------------------------------	-----

University of Rochester | Faculty | ID:115085

New Position

- 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

Position Actions

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

Applicants

Search by name, education, or status

Applicant Name Date Updated Applicant Status Tags My Overall Rating

No results returned by the selected filters.

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

## Position Summary

THIS POSITION IS: **Open to New Applicants**

Open Date: 4/26/2023

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: **Accepting Applications**

With this status active:

- Applicants **can** view this status.
- Applicants **can** update their application materials.
- Evaluators **can** review applications to this position.

[change](#)

EDIT POSITION...

- Basic Information
- Required Documents
- Evaluation Settings
- Application Forms
- Search Committee
- Position Notes

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](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"

Home 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.

Faculty Search  
 Positions  
 Templates  
 Administration  
 Reports  
**Users & Groups** ←

My Tasks

0 Unread Tasks

0 Read Tasks

Title Due Date

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
<a href="#">Linda Anderson</a> linda@rochester.edu	Administrator   University of Rochester	-	
<a href="#">Rochester Admin</a> rochester_admin@interfolio.com	Administrator   University of Rochester	-	
<a href="#">Anthony Scalfone</a> anthony.scalfone@rochester.edu	Administrator   School of Medicine and Dentistry	-	
<a href="#">Jonathan Wilson</a> jonathan.wilson@rochester.edu	Administrator   Office of the Provost	-	
<a href="#">Tara Bellini</a> tara@rochester.edu	Administrator   College of Arts, Sciences & Engineering	-	
<a href="#">Caroline Carlson</a> caroline.carlson@rochester.edu	Administrator   University of Rochester	-	
<a href="#">Marissa Cavalli</a> marissa@rochester.edu	Administrator   Simon Business School	-	
<a href="#">Charles DeWitt</a> charles.dewitt@rochester.edu	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 \***  
Select a unit ▾

**Role \***  
Committee Manager ▾

**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](mailto: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](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

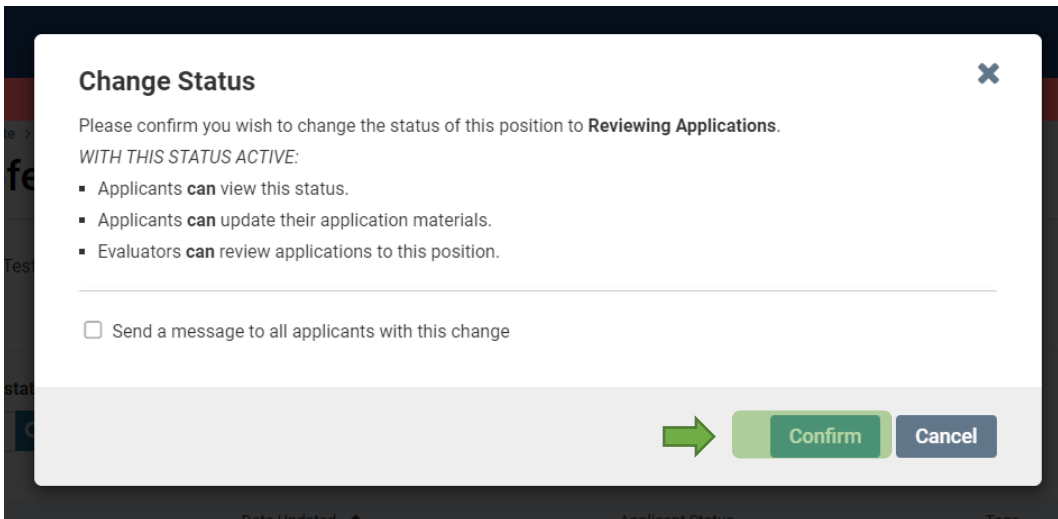
The screenshot shows the 'Positions' page in Interfolio. On the left, a navigation menu has 'Positions' highlighted with a green arrow. The main area displays a table of positions. The first row is for an 'Assistant Professor' at the University of Rochester, Faculty, ID:115085. The status is 'Accepting Applications'. A green arrow points to the 'Assistant Professor' text in the table.

- 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).

### Assistant Professor

The screenshot shows the 'Assistant Professor' position profile page. The 'Status' field is set to 'n/a' and has a 'change' button highlighted with a green arrow. A dropdown menu is open, showing various status options. The 'Reviewing Applications' option is highlighted with a green arrow. Below the dropdown, there is a table of applicants. The first applicant is 'Joseph Baker' with a 'Complete' status.

- 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

## 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: 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



M.A. - Master of Arts



[Save](#) [Clear Filters](#)



[Filter](#) ▾

[Saved Views](#) ▾

[COLUMNS](#)

<b>HIGHEST DEGREE EARNED:</b> <input checked="" type="checkbox"/> M.A. - Master of Arts	<b>APPLICATION STATUS:</b> No choices available.	<b>TAGS:</b> No choices available.	<b>PROGRESS:</b> <input type="checkbox"/> Complete
			<b>RATINGS:</b> <input checked="" type="radio"/> My Rating ☆☆☆☆ No Rating
			<b>ARCHIVED:</b> <input type="radio"/> Yes <input checked="" type="radio"/> 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](#)

#### Tags

strong publications



Application

[Complete](#)

[+ Add File](#)

[Read](#)

#### Documents

Title ^	Date ↕	Actions
C.V.	May 1, 2023	<a href="#">Download</a>
C.V.		
Cover Letter Uncategorized	May 9, 2023	<a href="#">Download</a>
Creative Work Creative Work	May 1, 2023	<a href="#">Download</a>

#### 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: 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

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

1 of 1 Applicants Shown.

[READ](#) [EMAIL](#) [STATUS ▾](#) [TAG ▾](#) [+ DISPOSITION CODE](#) [↓ DOWNLOAD](#) [ARCHIVE](#)

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester <a href="#">Complete</a>	05/01/23 01:16 PM EDT		<a href="#">+</a>	☆☆☆☆☆

- 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

Actions ▾

- 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](#)

## 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"

### Jane Doe

#### 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
<a href="#">C.V.</a> C.V.	May 1, 2023	<a href="#">Download</a>
<a href="#">Cover Letter</a> Cover Letter	May 1, 2023	<a href="#">Download</a>
<a href="#">Creative Work</a> Creative Work	May 1, 2023	<a href="#">Download</a>

#### Forms

Title ^
<a href="#">University Base Application Form</a> 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 <a href="#">change</a>	Apr 26, 2023	No date set

#### Applicants

Search by name, education, or status

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

1 of 1 Applicants Shown.

[READ](#) [EMAIL](#) [STATUS](#) [TAG](#) [+ DISPOSITION CODE](#) [DOWNLOAD](#) [ARCHIVE](#)

Applicant Name ^	Date Updated ↕	Applicant Status	Tags	My Overall Rating ↕
<input checked="" type="checkbox"/> <a href="#">Jane Doe</a> M.A. - Master of Arts, University of Rochester <a href="#">Complete</a>	05/01/23 01:16 PM EDT		<a href="#">+</a>	☆☆☆☆

- 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



Filter

Saved Views

COLUMNS

Archived  Save Clear Filters

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

[Filter by Form Responses](#)



2 Applicants Shown.

[READ](#) [EMAIL](#) [STATUS](#) [TAG](#) [DISPOSITION CODE](#) [DOWNLOAD](#) [UNARCHIVE](#)

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/> <b>Jane Doe</b> M.A. - Master of Arts, University of Rochester <span style="background-color: #28a745; color: white; padding: 2px;">Complete</span>	05/01/23 01:16 PM EDT		<a href="#">+</a>	☆☆☆☆

### 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

Position Actions ▾

<b>Unit</b> University of Rochester FS/LM Test Site	<b>Status</b> Reviewing Applications <a href="#">change</a>	<b>Opens</b> Apr 26, 2023	<b>Closes</b> No date set
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## Applicants

Search by name, education, or status

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

1 of 1 Applicants Shown.

[READ](#) [EMAIL](#) [STATUS ▾](#) [TAG ▾](#) [+ DISPOSITION CODE](#) [DOWNLOAD](#) [ARCHIVE](#)

Applicant Name ▾	Date Updated ▾	Applicant Status	Tags	My Overall Rating ▾
<input checked="" type="checkbox"/> <a href="#">Jane Doe</a> M.A. - Master of Arts, University of Rochester	05/01/23 01:16 PM EDT			☆☆☆☆
<a href="#">Complete</a>				

- **Select the desired disposition code and click “Apply”**

Apply Disposition Code ×

- Candidate Withdrawn
- Candidate Withdrawn: Accepted Another Job
- Candidate Withdrawn: Location
- Candidate Withdrawn: No Longer Interested
- Candidate Withdrawn: Salary
- Candidate Withdrawn: Schedule
- Candidate Withdrawn: Unable to Contact
- Ineligible: Applied After Job Filled
- Ineligible: Duplicate Application
- Ineligible: Incomplete Application
- Ineligible: Not Authorized to Work in U.S.
- Not Selected: Failed Prescreening
- Not Selected: Lacks Minimum Qualifications
- Not Selected: Lacks Preferred Qualifications
- Not Selected: Less competitive based on education
- Not Selected: Less competitive based on field of study
- Not Selected: Less competitive based on work experience
- Not Selected: No Call/No Show for Interview
- Not Selected: Offer Rescinded
- Not Selected: Poor Interview
- Not Selected: Poor References

[APPLY](#) [REMOVE DISPOSITION CODE](#)

- **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.”

### Assistant Professor

<b>Unit</b> University of Rochester FS/LM Test Site	<b>Status</b> Reviewing Applications <a href="#">change</a>	<b>Opens</b> Apr 26, 2023	<b>Closes</b> No date set	<b>Position Actions</b> ▾ <ul style="list-style-type: none"><li>Edit Position</li><li>View Committee</li><li>View Position Activity Log</li><li>View position details</li><li>View Referral Sources</li><li>Add New Applicant</li><li>Close Position</li></ul>
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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<br>M.A. - Master of Arts, University of Rochester | 05/01/23 01:16 PM EDT | <a href="#">Complete</a> | <input type="button" value="+"/> | ☆☆☆☆                |

## Closing Position

Was an applicant selected?

Yes 

No

Select Applicant(s)

You must select at least one applicant to continue.

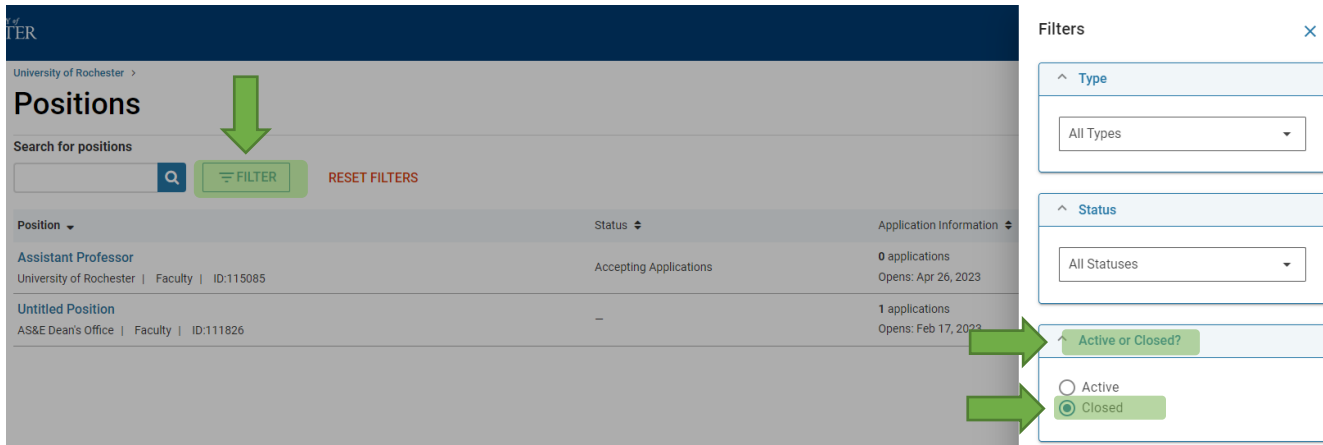
- **The process of having your selected applicant approved for hire starts by closing the position. This will trigger a notification to the Office of Academic Affairs to approve moving the action to myURHR or reject.**

- **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.



- 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 F](#)

Unit	Status	Opens	Closes
University of Rochester	Accepting Applications (Closed) <a href="#">change</a>	Apr 26, 2023	No date set

Applicants

Search by name, education, or status

Filter | Saved Views | COLUMNS

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

**Position Actions** dropdown menu:

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

For more information on managing a search, see Interfolio’s help site: [https://product-help.interfolio.com/en\\_US/creating-and-managing-applications](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#/>

## SENDING A HIRE TO MYURHR

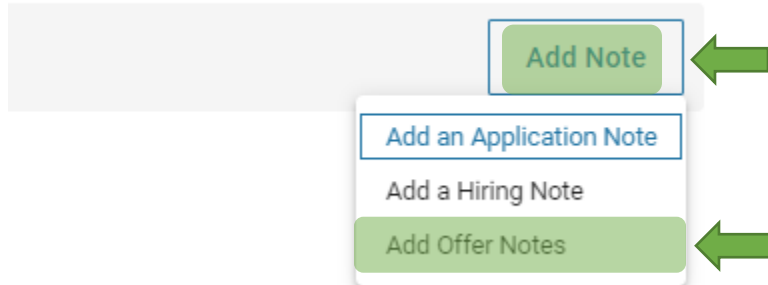
- An integration has been set up to send a hire directly from UR Faculty to myURHR. There, they will be placed into the position that was initially created to kick off the recruitment process. If the hire will be using a different job code from what was entered into the myURHR position, you will need 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

- 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.



- 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.

### Offer Notes ✕

Add a note to provide clarification about this applicant to your committee. Notes can only be created by Committee Managers and Administrators, but are visible to all members of this committee.

BP: new hire

➔ ✓ Save Cancel

- 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.

Add Note ➔

Add an Application Note


Add a Hiring Note ➔

Add Offer Notes

## Hiring Note ✕

Add a note to provide clarification about this applicant to your committee. Notes can only be created by Committee Managers and Administrators, but are visible to all members of this committee.

12345678

 ✓ Save Cancel

- 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



### Application

## Documents

Title ^

C.V.

C.V.

Cover Letter

Uncategorized

Creative Work

Creative Work

Under Review

Pre-screen

Withdrawn

Interview

Longlist

Shortlist

Strong Candidate

Offer Pending

Offer Accepted

Hired

Decline

Remove Status

- 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-YF0IFRD2r1GbTFIMYyaTma#/>