Creating a New Position in the Ad Generator and Interfolio

- You can access the Ad Generator at https://www.med.upenn.edu/apps/adg3n or selecting “Ad Generator 3.0” under Faculty Administration in my.med.
- You can access Interfolio at https://home.interfolio.com/31697 or by selecting “Interfolio” under Faculty Administration in my.med.

- The Ad Generator will be utilized when creating a new position, and is utilized to collect basic information about the position and build the ad text.
- Interfolio Faculty Search will be utilized to finish creating a new position (include adding additional application requirements and selecting your committee members), manage existing positions, and review applicants.
In Ad Generator

1. Navigate to the Ad Generator at https://www.med.upenn.edu/apps/adg3n or selecting “Ad Generator 3.0” under Faculty Administration in my.med.

2. From here, you can:
   a. View positions that are: In Progress – not yet submitted to Interfolio; Uploaded – submitted to Interfolio; All – all In Progress and Uploaded ads
   b. Sort by column by clicking on the blue headers
   c. Delete an “In Progress” ad. Note – once an ad has been deleted it cannot be recovered.

3. To create a new ad, click “New Ad”
4. In the first screen:
   a. Select the type of add and rank (for Faculty), or the Academic Support Staff Position. **Note – Position type and rank cannot be updated after this screen. If you make an error, you will need to delete the ad and start again.**
      i. For faculty ads, you can select “Tenure” and “Clinician Educator” together if you are searching for a candidate for either of those tracks.
      ii. See “Academic Support Staff” section below for details on creating ads for this group.
   b. Select the Recruiting organization. **Note – you will only see organizations listed for which you can create a new position.**
   c. Input your Public ad title.
      i. If this is for a position with CHOP, please include ‘CHOP’ in the title.
      ii. Ad titles should be 6-10 words long
      iii. There is no need to include your department/division name in the ad title – this will be listed on the ad in Interfolio.
         1. For external ad publishing, you can insert your department information in the title as needed.
   d. When you are finished, click “Create Ad.”
Full-time Faculty

5. Now, you will finish inputting all of the required and option information for your ad text:
   a. Basic Info:
      i. Here, you will see that the track and rank, ad title, and recruiting organization are pre-filled in from the first screen. You may update the title and recruiting organization as needed.
      ii. Select if this position is being co-sponsored by either CHOP or the VA.
      iii. Select if this position is intended for multiple hires (this is just to create the appropriate ad language, this does not require or preclude you from hiring multiple candidates based on your selection).

b. Responsibilities
   i. This section is tailored to your track selection, so you will see only the responsibility areas that apply to that track. Additional responsibilities that do not fall within a given area can be added to the “Additional information” box as seen below.
      1. For Tenure – Teaching and Research responsibilities are required, Clinical responsibilities are optional (if the position is for a basic scientist)
      2. For Clinician Educator – Teaching, Clinical, and Research responsibilities are required
      3. For Research – Research responsibilities are required
      4. For Academic Clinicians – Teaching and clinical responsibilities are required
   ii. All of these fields are complete the sentence. Each statement begins with “XXXXX responsibilities may include…” and is finished by the user. Please be sure that your statement makes sense.
c. Requirements
   i. Degree – select from the drop down list of degree options.
   ii. Expertise – This field is **complete the sentence**. The statement begins with “Expertise is required in the specific area of...” and is finished by the user. Please be sure that your statement makes sense. This field is optional.
   iii. Certifications – Please include all required or anticipated certifications, eligibility, experience, etc. This field is optional.

d. Additional Information – Use this space to describe your department, division, additional responsibilities, CHOP/Penn/the VA, Philadelphia, etc. This field is optional.
6. Preview, Save, or Go Back
   a. To preview your ad text and send the position to Interfolio, click “Next” (see step 7 for more information).
   b. To save your work at any time, click “Save.”
   c. To go back to the home page (list of positions currently In Progress), click “Back.”

Additional

7. Submitting Your Position to Interfolio
   a. To preview your ad text and send the position to Interfolio, click “Next” as seen above.
   b. The Ad Generator will automatically generate the ad text based on the information you entered in the various fields. Please review this text carefully to ensure that the ad makes sense and covers the right information for your position. Note – this is unapproved ad language and should not be published. The content can be copied and pasted into an email and shared with staff and faculty for review.
      i. If you need to update any of the information, select “Cancel” and make the necessary updates.
      ii. If the draft looks good, click “Send to Interfolio.”
iii. The system may “think” for a few seconds while it works in the background. Once the position has been submitted to Interfolio, you will be taken back to the Ad Generator home screen and a direct link to continue creating your new position will be in the green bar at the top. Click the link “here” to continue creating your position.

iv. We highly encourage you to continue straight into Interfolio to complete required position information and submit it for approval.
Academic Support Staff

Follow Steps 1-4 above.

1. In the first screen:
   a. Select the Academic Support Staff Position. **Note** – **Position type and rank cannot be updated after this screen. If you make an error, you will need to delete the ad and start again.**
   b. Select the Recruiting organization. **Note** – you will only see organizations listed for which you can **create a new position**.
   c. Input your Public ad title. If this is for a position with CHOP, please include ‘CHOP’ in the title.
   d. When you are finished, click “Create Ad.”
2. Now, you will finish inputting all of the required and option information for your ad text:
   a. Basic Info:
      i. Here, you will see that the position, ad title, and recruiting organization are pre-filled in from the first screen. You may update the title and recruiting organization as needed.
      ii. Select if this position is being co-sponsored by either CHOP or the VA.
      iii. Select if this position is intended for multiple hires (this is just to create the appropriate ad language, this does not require or preclude you from hiring multiple candidates based on your selection).

   b. Responsibilities
      i. Please list the specific responsibilities associated with this position.
      ii. This field is complete the sentence. The statement begins with “Responsibilities may include...” and is finished by the user. Please be sure that your statement makes sense.

      Responsibilities
      Responsibilities may include...
      developing expertise in research skills, including scholarship, clinical care related to research, and teaching medical students, residents and/or fellows.
c. Requirements
   i. Degree – select from the drop down list of degree options.
   ii. Expertise – This field is **complete the sentence**. The statement begins with “Expertise is required in the specific area of…” and is finished by the user. Please be sure that your statement makes sense. This field is optional.
   iii. Certifications – Please include all required or anticipated certifications, eligibility, experience, etc. This field is optional.

   **Requirements**

   Degree
   M.D. or M.D./Ph.D. ▼

   Expertise is required in the specific area of...
   Complete the sentence

   List all required certifications
   Optional

   Board Certified/ Eligible in Emergency Medicine.

d. Additional
   i. Additional Information – Use this space to describe your department, division, additional responsibilities, CHOP/Penn/the VA, Philadelphia, etc. This field is optional.
   ii. Opportunities for growth - Here, you should describe how being in this role will develop the candidate and provide them with additional training opportunities. This field is **complete the sentence**. The statement begins with “The successful applicant will have an opportunity to…” and is finished by the user. Please be sure that your statement makes sense.

   **Additional**

   Additional information
   Optional

   Additional information to include with ad text

   The successful applicant will have an opportunity to...
   Develop individual training experiences in research and/or teaching that will allow selected candidates to attain personal career objectives while developing a career in an academic setting.

3. Preview, Save, or Go Back
   a. To preview your ad text and **send the position to Interfolio**, click “Next” (see step 4 for more information).
   b. To save your work at any time, click “Save.”
   c. To go back to the home page (list of positions currently In Progress), click “Back.”
4. Submitting Your Position to Interfolio
   a. To preview your ad text and send the position to Interfolio, click “Next” as seen above.
   b. The Ad Generator will automatically generate the ad text based on the information you entered in the various fields. Please review this text carefully to ensure that the ad makes sense and covers the right information for your position. Note – this is unapproved ad language and should not be published. The content can be copied and pasted into an email and shared with staff and faculty for review.
      i. If you need to update any of the information, select “Cancel” and make the necessary updates.
      ii. If the draft looks good, click “Send to Interfolio.”
   iii. The system may “think” for a few seconds while it works in the background. Once the position has been submitted to Interfolio, you will be taken back to the Ad Generator home screen and a direct link to continue creating your new position will be in the green bar at the top. Click the link “here” to continue creating your position.
   iv. We highly encourage you to continue straight into Interfolio to complete required position information and submit it for approval.
In Interfolio

A new tab/window will open in Interfolio.

1. “Required Documents” (landing page after you click “here” in the step above).

   a. The Cover Letter and CV are already set as required for this position – **do not remove them**.
   b. If you would like to add other requirements, click “Add Requirement” and select from the list of options.
      i. Please note that these are simple document attachments, so the “Number Required” is the number of actual document attachments that will be required before the candidate can submit an application. Also, take advantage of the “Requirement Note” to explain what you are looking for.
         1. **Note** – These requirements can be updated at a later point in the search if the department would like to request additional documents from specific candidates. Please reach out to FAPD for more information about conducting a Multi-Stage Search.
      ii. When you are finished, click “Save.”
c. We recommend that you do not select either of the options under “Additional Applicant Options.” Applicants will receive a system generated message confirming submission of their application from Interfolio.

d. When you are finished with this section, click “Save & Continue.”

2. Evaluation Settings

   a. Please click “Skip Step” for this section. We will not be adding criteria for evaluation at this time.
3. Application Forms
   a. This section allows you to collect additional information about candidates in a structured format. Note – forms must be created before you want to use them in a position. Please reach out to FAPD if you are interested in having application forms created for your department.

   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.

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

<table>
<thead>
<tr>
<th>Where did you hear about this position?</th>
<th>Preview</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Status</td>
<td>Preview</td>
<td>Required</td>
</tr>
</tbody>
</table>

   + Add Form

   Applicants must complete an Equal Employment Opportunity form

   Request for Voluntary Self-Identification

   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

   b. Within this section, two forms are pre-set as “required” – “Where did you hear about this position?” and “Employee Status.” You can preview either of these forms by clicking the “Preview” button next to the form. All applicants will be required to complete the Self-ID (EEO) form at the applicant stage – “I wish not to disclose” will still remain an option when completing this form.

c. If you have created additional application forms, you can add them by clicking “Add Form” and selecting your form from the drop down menu and clicking “Save.”

   d. When you are finished with this section, click “Save & Continue.”
4. Search Committee
   a. It is important to identify those that will be Search Managers (previously called search chairs and applicant managers) and Evaluators (previously called search committee members).
   b. Academic Support Staff positions are not required to have a search committee.
   c. Do not delete the pre-populated Committee Manager “UPenn SOM API User” from your committee.

   **Search Committee**

   ![Add Member and Add Manager buttons]

   **1 Committee Member**

   UPenn SOM API User Committee Manager

   ![Save & Continue and Skip Step buttons]

   **Committee Manager**

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

   ![Add Manager dialog box]

   **Add Manager**

   Search the name of the person you would like to add.
   
   1. **Note** – The “Committee Manager” role must be pre-assigned to a user for them to show up on this list. For more information on adding this role to a user, please see the “Adding a Committee Manager Role” section.

   iii. Click “Add” next to the person’s name. You may have as many “Managers” as is necessary for your search, but please do not assign evaluators/committee members to this role.

   iv. Click “Close” when you are finished.

   e. To add a Committee Member/Evaluator:
i. Click “Add Member”

![Add Member Image]

ii. Search the name of the person you would like to add.
   1. **Note** – All users will be available in the search list. Please be sure that you are selecting the correct person for the committee by confirming the name and email that appears in the search.

iii. Click “Add” next to the person’s name. You may have as many “Members” as is necessary for your search.

iv. Click “Close” when you are finished.

f. Once you have confirmed your committee members and are finished with this section, click “Save & Continue.”
5. Internal Notes
   a. This section may have some pre-populated information about the position, but will remain largely unused.
b. Once the position has been approved, you will attach copies of your published ads in the “File Attachments” section of “Internal Notes.” For more information on adding this role to a user, please see the “Attaching External Ad Publications” section.

c. When you are finished with this section, click “Save & Continue.”

6. Review Position and Submit for Approval

**Review Position**

- 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 Information**

- Description & Dates Edit
- Required Documents Edit
- Evaluation Settings Edit
- Application Forms Edit
- Search Committee Edit
- Internal Notes Edit

- Review all of the information under each header. All information will be listed under each section – you will not be required to “Edit” unless an update is needed.

  i. **Do not edit any information under the “Description and Dates” section.** This information is automatically created from the Ad Generator. If an update is required, please include a personal message (with specific updates) when submitting the position for approval (see below).

  b. When you have reviewed all of the available information, click “Submit for Approval.”
Send Position for Approval

This position needs to be approved before it is published and available for application. The approver(s) displayed will receive a message asking them to review the position. You will receive an email once the position has been approved by all approvers.

Position
Assistant Professor, Tenure Track in Psychiatry - CHOP

Send To
Step 1 of 2: School Faculty Affairs

Personalize Message
☐ Include a personal message to the members receiving access.

Send
Cancel

1. All positions will be reviewed by FAPD first, before moving to the DSA. The DSA will receive an email notification when the submission has been approved by FAPD and is ready for their review.

2. You can choose to include a personalized message by clicking the check box. You will be asked to provide a subject and message content – this will appear in the email message that the reviewer receives.

3. When are you ready to submit the position (whether you included a personal message or not) click “Send.”

7. Once the position has been submitted, you will be redirected back to your “Position” landing page. Here you will see all of your positions and their current statuses, including the position that is awaiting approval.

a. You will see which step the position is currently at for approval.

b. You will also see the open date range for the position. Positions will be live for two years

   i. You will be able to accept applications for the position seven (7) days after you have sent it to Interfolio from the Ad Generator. This means that FAPD and your DSA will have a seven-day window in which to approve the position. The “close date” for the position will remain the same, regardless of how long it takes for the position to be reviewed and approved.