Ad Generator and Interfolio Faculty Search User Guide

This document is a work in progress. FAPD will continue to add sections and refine the included information. Updated versions will be placed on the Interfolio Faculty Search resource page.

- 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.

Table of Contents

<table>
<thead>
<tr>
<th>Creating, Submitting, Updating, and Approving a Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating a New Position in the Ad Generator and Interfolio</td>
</tr>
<tr>
<td>Approving Positions in Interfolio Faculty Search</td>
</tr>
<tr>
<td>Updating a Returned Position in Interfolio</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Managing Your Position in Interfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updating Position Status and Posting the Application Link</td>
</tr>
<tr>
<td>Publishing and Storing your External Ad Publications</td>
</tr>
<tr>
<td>Viewing Position Text and Link</td>
</tr>
<tr>
<td>How to Add “Committee Manager” Role to Search Chairs</td>
</tr>
<tr>
<td>Updating Committee Managers and Evaluators on an Approved Position</td>
</tr>
<tr>
<td>Updating Required Documents on an Approved Position</td>
</tr>
<tr>
<td>View the Position Activity Log</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Managing a Search and Reviewing Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessing Applicant Materials</td>
</tr>
<tr>
<td>Assign or Change an Application Status</td>
</tr>
<tr>
<td>Assigning Tags to Applicants</td>
</tr>
<tr>
<td>Assigning Disposition Codes</td>
</tr>
<tr>
<td>Documenting Outreach</td>
</tr>
<tr>
<td>Request a Letter of Recommendation on Behalf of an Applicant</td>
</tr>
<tr>
<td>Archive or Unarchive an Applicant</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Identifying Your Preferred Candidate and Closing Your Search – Coming Soon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifying Your Preferred Candidate and Completing Your Affirmative Action Requirements</td>
</tr>
<tr>
<td>Closing a Position</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run an Applications or Positions Report</td>
</tr>
<tr>
<td>Running an EEO Report (for DSAs)</td>
</tr>
<tr>
<td>Resources Coming Soon</td>
</tr>
</tbody>
</table>
Creating, Submitting, Updating, and Approving a Position
Creating a New Position in the Ad Generator and Interfolio

- 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](https://www.med.upenn.edu/apps/adg3n) or selecting “Ad Generator 3.0” under *Faculty Administration* in *my.med*.

   ![Ad Generator](https://www.med.upenn.edu/apps/adg3n)

   - 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.

2. 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 “XXX 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.
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.”

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.

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**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 **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 **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
   
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.

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.
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

To add a Committee Manager (search chair, applicant manager that does not already have access to the department/division):
i. Click “Add Manager”

![Add Manager]

ii. 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 window]

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.

### Internal Notes

- **Position ID or Requisition Number**

- **Rank**
  - e.g., Associate Professor, Lecturer

- **Title**
  - e.g., Visiting, Clinical, Research

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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

![Review Position](image)

a. 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.

Positions

Search for positions

Search for positions

Type
All Types

Status
All Statuses

Active or Closed?
Active

Position
Assistant Professor, Tenure Track in Psychiatry - CHOP

Status
Waiting For Approval

Application Information

0 applications

EEO Notes

Notes

Assistant Professor, Tenure Track in Psychiatry - CHOP

Standing Faculty | ID:47422

Step 1 of 2: School Faculty Affairs

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.
Approving Positions in Interfolio Faculty Search

1. Click “Review Position” in the email notification that you receive. If you lose track of the email, follow the steps below in 1a.

   a. If you lose track of the email, you can login to Interfolio at https://home.interfolio.com/31697 or by selecting “Interfolio” under Faculty Administration in my.med.

   i. The position requiring approval may be listed in the “Your Action Items” section. If so, click the name of the position.
      1. Alternatively, click “Positions” on the left.
      2. Click the name of the position you need to review
2. Review Position Details
a. **Note** – You are able to edit the position details if you do not want to send the position back for something minor.
   i. Click “Edit”
   ii. Update the necessary information.
   iii. Click “Save and Continue” at the bottom of the page to save any updates.
   iv. Navigate back to Step 1 above to access the review and approval portal.

3. Review Required Documents and Committee Members
a. **Note** – You are able to add additional required documents or edit the committee membership if you do not want to send the position back for updating by the faculty coordinator.
   i. Click “Edit”
   ii. Update the necessary information.
   iii. Click “Save and Continue” at the bottom of the page to save any updates.
   iv. Navigate back to Step 1 above to access the review and approval portal.

4. Approve or Send back the Position
a. If you approve the position, select “Approve.” A personalized message is not required, and click “Send.”

b. If you send the position back, please be sure to send it back to the “Position Creator”, and include a note about what needs to be updated.
Position
Assistant Professor, Tenure Track in Psychiatry - CHOP

Send To *
Position Creator: UPenn SDM API User (upenn_som_apiuser@interfolio.com)

Personalize Message
☐ include a personal message to the members receiving access

From Name
Josh Gianitis

Reply to email address
joshmog@upenn.edu

Subject *
Please Update

Message *
Please update the job responsibilities to better describe the clinical role within the department and resubmit.

Send  Cancel  Preview
1. You may or may not receive an email notification when a position has been returned. It is important to keep track of your pending positions to ensure that they are reviewed, approved, and posted in a timely manner. Please check all positions with an empty “Status” by clicking on the name of the position.

2. If the position has been returned, you will see a notice, along with which review level sent it back and the message as to why it was returned.

3. To make the required updates, click “Edit Position.”

4. Click “Edit” next to the required areas, based on the feedback you received. This is the only time when you should edit ad text within Interfolio.
5. Make the necessary updates to the title and position description. Do not update the Location, Open Date, or Deadline options.

The Children's Hospital of Philadelphia and the Department of Psychiatry at the Perelman School of Medicine at the University of Pennsylvania seek candidates for several Assistant Professor positions in the tenure track. Expertise is required in the specific area of adolescent psychiatry, with a focus on behavioral disorders.

Teaching responsibilities may include mentoring students, residents and fellows and course lecturing.
6. When finished with any updates, click “Save and Continue” at the bottom of the page.

7. Return to the position submission page and submit the updated position. The position will be submitted back to the review level that returned it.
Managing Your Position in Interfolio
At times, the department will be responsible for setting the position to “Accepting Applications” and posting the position link. We anticipate that this will only be required if the position is not approved prior to the “go-live” date. **Do not update the position status once the position has been set to “Accepting Applications” unless instructed to do so by FAPD.**

1. Click the name of the position.

2. Click “Position Actions” and then click “Edit Position.”

3. To update the status and make the link active.
a. To publish the application link, click “change” under the “Apply Now” page.
b. To update the position status to accept applications, and to ensure that committee members are able to view applicants, click “Update Status.”

i. Click “change” and select “Accepting Applications” from the drop down list.
ii. Ensure that all three check boxes are selected, including “Evaluators can review applications while the status is active.”
iii. Click Save
iv. Ensure that you can view the link (which will be used for publishing) and that the status has been updated.
Publishing and Storing your External Ad Publications

Once your position has been approved by your DSA, and the link is live and the position status has been set to “Accepting Applications”, you will need to publish the position according to the appropriate search guidelines, and then attach copies of the ad posting to the position in Interfolio.

All positions in Interfolio will automatically be posted to Inside Higher Ed, the Higher Education Recruitment Consortium (HERC), and Diverse Issues in Education (Diverse Jobs). You will not be required to post to any of these locations, and you will not be required to obtain copies of these postings.

As a reminder, beginning in academic year 2019-20, position posting guidelines are as follows:

- Tenure, CE, and Research positions – required to post in at least one national journal specific to the discipline
- AC and Academic Support Staff– no additional national journal publications required

1. To get the ad language and application link
   a. Find the position in your list of positions
   b. Click “Position Actions” and then click “View position details.”
   c. Here, you will find the position URL and description. All of the text in the “Position Description” section must be utilized for any external publication. Please note the location of the position title.
2. Once you have posted your position to journal(s), follow the steps below to attach copies to the positions.
   a. Click the position in your list of positions
b. Click “Position Actions” and then click “Edit Position.”

c. Click “Internal Notes”

d. Scroll to the bottom and click “Add File.” Here, you will attach a copy of each of your external publications (to national journals, diversity journals, job boards, etc.).
e. Title the “Attachment Name” the name of the publication, and attach a copy of the posting. Click “Save.”

f. Repeat the above steps for all external ad publications.

g. When finished, click “Update.”
Viewing Position Text and Link

1. To get the ad language and application link
   a. Find the position in your list of positions

   Positions
   
   Search for positions
   
   Type | Status | Active or Closed?
   All Types | All Statuses | Active

   Assistant Professor, Tenure Track in Psychiatry - CHOP
   Psychiatry | Standing Faculty | ID: 47422
   Status: Accepting Applications
   Application Information: 0 applications
   Open from: Jun 4, 2019 - Jun 4, 2021

   b. Click “Position Actions” and then click “View position details.”

   Assistant Professor, Tenure Track in Psychiatry - CHOP
   Unit: Psychiatry
   Status: Accepting Applications
   Opens:

   c. Here, you will find the position URL and description. **All of the text in the “Position Description” section must be utilized for any external publication.** Please note the location of the position title.
**Position Details**

**Basic Information**

<table>
<thead>
<tr>
<th>Position Title</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistant Professor, Tenure Track in Psychiatry - CHOP</td>
<td>Philadelphia, PA</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Position Type</th>
<th>Position URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standing Faculty</td>
<td><a href="apply.interfolio.com/63672">apply.interfolio.com/63672</a></td>
</tr>
</tbody>
</table>

**Position Description**

The Children's Hospital of Philadelphia and the Department of Psychiatry at the Perelman School of Medicine at the University of Pennsylvania seek candidates for several Assistant Professor positions in the tenure track. Expertise is required in the specific area of adolescent psychiatry, with a focus on behavioral disorders.

Teaching responsibilities may include mentoring students, residents and fellows and course lecturing.

Clinical responsibilities may include providing essential contributions to the clinical programs of the department, including substantial teaching and/or independent contributions to clinical research programs. Publications may derive from clinical observations or from participation in studies.

Research or scholarship responsibilities may include the development of an independent research program that is synergistic with the scientific and clinical missions of the Department of Psychiatry.

Applicants must have an M.D. or Ph.D. or M.D./Ph.D. degree. Board certified or eligible in Psychiatry.

We seek candidates who embrace and reflect diversity in the broadest sense.

The University of Pennsylvania and The Children's Hospital of Philadelphia are EOEs. Minorities/women/individuals with disabilities/protected veterans are encouraged to apply.

**Qualifications**

Application Instructions
How to Add “Committee Manager” Role to Search Chairs

The “Committee Manager” role must be assigned to a faculty member prior to attempting to add them to that role in a search.

- Some faculty will already be assigned this role before the application goes live, but follow the steps below to add others as needed.
- If your department has divisions, anyone you assign as a “Committee Manager” at the department level will be available at the division level.
- You must assign this role to a faculty member for each division/center/institute they will be working with.

1. After logging in to Interfolio, click “Users and Groups” in the menu on the left. If you do not see a menu on the left, click to “Expand Menu” as seen below. Note – you may or may not have all of the same menu options as seen below. All Faculty Coordinators should have the ability to update their Committee Managers.

2. Search for the name of the faculty member that needs the updated role, and click the “pencil” icon on the right.
3. Scroll down to the “Permissions” section.

Permissions
Role
A user’s role determines their capabilities in the program. Learn more about User Roles.

Unit *
Psychiatry

Role *
Committee Manager

a. Select the department/division/center/institute for which are assigning the permission.
b. Select “Committee Manager” for the Role.
c. Click “Save” when you are finished.
Updating Committee Managers and Evaluators on an Approved Position

At times, search committee membership may need to be updating while a position is open.

1. Click the name of the position.

2. Click “Position Actions” and then click “Edit Position.”

3. Click “Search Committee” on the right.

4. Make the required updates by adding or removing Committee Managers and/or Members. Once you have confirmed your committee members and are finished with this section, click “Update.”
Updating Required Documents on an Approved Position

At times, document requirements may need to be updating while a position is open.

1. Click the name of the position.

2. Click “Position Actions” and then click “Edit Position.”

3. Click “Required Documents” on the right.

4. Make the required updates by adding or removing documents. Once you have confirmed your requirements and are finished with this section, click “Update.”
View the Position Activity Log

Interfolio Faculty Search keeps an automatic log of the user actions and events that take place around each position in the program on the position activity log.

The position activity log for any given position is visible only to users with Administrator rights over that position (admins and committee managers). It is separate from the existing system logs under Reports. These logs provide you with a clear record of when certain changes were made and by whom.

1. Select "Positions" from the left-hand navigation, and then click on the name of the position you want to view.

2. Click the "Position Actions" button at the top right of the applications page of the position, and select "View position activity log."
a. The position history will display a list of actions and events:
   i. The user will see a log with entries indicating changes or activity. This list of events can be searched and sorted by date or event. A link to “View Message” concerning the event will appear where applicable.
   ii. You can access the position activity log from within the individual position.
   iii. Currently, position activity log data is just for the individual position, and not available in aggregate (such as through Reports).
Managing a Search and Reviewing Applicants
Accessing Applicant Materials

In Faculty Search, all the applications to a given position appear listed on one page.

The list of applications for a position is often quite long. There are a number of useful features and organizational tools to help you sort and manage your work on the Applications List. See here for more information on working with the Applicant List.

To view the list of applicants for a position:

1. Select "Positions" from the left-hand navigation.

2. Click the position title to open the list of applications for that position.

3. You will see the list of applicants for your position listed in a table as shown below.
To access applications, select one or more applicants in the list

1. Check the "Applicant Name" box at the top of the table to select all applicants in the list, or check the box next to the applicant(s) you want to review.
2. Click an applicant's name to view the profile of an individual applicant.
3. Selecting a name or names from the list opens a new set of buttons on the page.

**Note:** The buttons that appear after selecting an application are determined by your role in the program. If you are an evaluating committee member, you will likely see "Read" and "Tag" buttons. Committee Managers or Administrators may see additional buttons for assigning a status to an application, emailing applicants, etc.

To read application materials:

1. Click "Read" to view selected applications in your browser using Interfolio's "Materials Viewer." See below for more information on using the viewer to read and annotate application materials.
2. All selected applications will be loaded into the viewer for you to review one at a time.

3. Users can use the “Search PDF” box to find specific text in an applicant's materials.

4. All materials of the currently displayed application will appear bookmarked in the left-hand column of the viewer.
   a. Click the name of a document to display it in the viewer.
5. Use the arrows at the top of the viewer to move between applications when multiple applicants are selected.

6. Use the controls at the bottom of the viewer for navigation of the currently displayed application:
   a. Toggle on or off the header bar of the viewer for distraction free viewing of materials.
Using Document Annotations

Annotations are private, personal notes about an application, and are only viewable by the committee member who added the note. See here for more information on making annotations on application documents.

1. Annotations are added and managed from the lower right corner of the viewer.

b. Zoom in or out of the document

c. Page forward or backward in the displayed application
2. Click the "note" icon to leave an annotation on the currently displayed document.

3. Click the "view" icon to toggle on or off the display of annotations.

   a. You can quickly view all of the annotations added to a document from the "Annotations" tab in the document viewer

4. Click the annotation in the list to find it in the application.
5. You can export and download annotations by clicking the export icon. Annotations are exported to a PDF file that you can save, download and print.
To download materials for one or more selected applications:

1. Select one or more applicants in the list

2. Click the "Additional Options" icon and select "Download."
3. You will receive an email as a notification when your download is ready.
4. From the received letter, click to download your materials
Assign or Change an Application Status

Committee Managers or Administrators can assign or change an application status in Interfolio Faculty Search from the Applications page or the Applicant Profile page.

Application statuses are applied to individual applicants to indicate where their application is within the search process. This feature is particularly useful for sorting applicants and controlling when subsets of applicants can and cannot update their applications. The following Application Statuses are specific to University of Pennsylvania.

<table>
<thead>
<tr>
<th>Application Status Values</th>
<th>Used For</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Application Received</strong></td>
<td>Application has been received by the department (status not required)</td>
</tr>
<tr>
<td><strong>Under Review</strong></td>
<td>Application is currently under review by the search committee (status not required)</td>
</tr>
<tr>
<td><strong>Longlist</strong></td>
<td>List of applicants to consider after first round of cuts (status not required)</td>
</tr>
<tr>
<td><strong>Interview Round 1</strong></td>
<td>Applicant has been interviewed – <strong>required for all interviewed candidates</strong></td>
</tr>
<tr>
<td><strong>Shortlist</strong></td>
<td>List of final applicants to be considered for hire – <strong>required so DSA can review candidate list and approve search process</strong></td>
</tr>
<tr>
<td><strong>Interview Round 2</strong></td>
<td>Applicant has been interviewed at a second or later round (status not required)</td>
</tr>
<tr>
<td><strong>Offer Extended</strong></td>
<td>An offer of employment has been extended (status not required)</td>
</tr>
<tr>
<td><strong>Offer Accepted</strong></td>
<td>Applicant has accepted the employment offer</td>
</tr>
<tr>
<td><strong>Offer Declined</strong></td>
<td>Applicant has declined the employment offer - <strong>will also require a disposition code</strong></td>
</tr>
<tr>
<td><strong>Not Selected</strong></td>
<td>Required for any candidate not selected for hire – will also require a disposition code</td>
</tr>
<tr>
<td>**Selected - Appointment</td>
<td>Standing Tenure Track</td>
</tr>
<tr>
<td>**Selected - Appointment</td>
<td>Academic Support Staff</td>
</tr>
<tr>
<td>**Selected - Appointment</td>
<td>Associated Faculty</td>
</tr>
<tr>
<td>**Selected - Appointment</td>
<td>Associated Faculty</td>
</tr>
<tr>
<td>**Selected - Appointment</td>
<td>Associated Faculty</td>
</tr>
<tr>
<td>**Selected - Appointment</td>
<td>Associated Faculty</td>
</tr>
<tr>
<td>**Selected - Appointment</td>
<td>Associated Faculty</td>
</tr>
<tr>
<td>**Selected - Appointment</td>
<td>Standing Clinician-Educator</td>
</tr>
<tr>
<td>**Selected - Appointment</td>
<td>Standing Clinician-Educator</td>
</tr>
</tbody>
</table>
**Selected - Appointment | Standing Tenure Track | With Tenure Ranks**

For Appointment of Associate or Full Professor on the Tenure Track with tenure

**Selected - Appointment Approval not Required**

Utilized for Academic Support Staff “Preferred Candidate”

**Hired**

To be applied once the selected candidate has been hired at Penn

**Withdrawn**

Candidate has withdrawn from consideration - will also require a disposition code

It is highly recommended that the search administrator maintain current application status values for each applicant during the search process. **Every applicant that is interviewed must have the “Interview Round (1 or 2)” applied to their application. Additionally, you are required to add a tag with the interview date.** See below for more information on using tags.

When the search has concluded, every applicant must be set to either Selected, Hired, Withdrawn, or Not Selected. **When identifying a candidate that you plan to appoint, you will use the “Selected” status that includes the correct appointment action (see table above, and additional steps in the “Identifying Your Preferred Candidate and Completing Your Affirmative Action Requirements” section).**

For the review of Academic Support Staff, you will identify which applicants are interviewed and apply that status and use a tag to list the interview date. **When you have identified your preferred candidate, apply the “Selected – Appointment Approval not Required” status.** These searches will not have dossier cases created in RPT.

The following chart and narrative show a suggested process flow for the use of application status values through the search process.
Application Status Flow

1. **Application received**
   - Candidate meets minimum requirements?
     - Yes → Initial Application Review
     - No → Continue to consider?

2. **Under Review**
   - Initial Application Review
     - Continue to consider?
       - Yes → Longlist
       - No → Continue to consider?

3. **Longlist**
   - Interview scheduled?
     - Yes → Interview Round 1
     - No → Continue to consider?

4. **Interview Round 1**
   - Interview feedback reviewed
     - Second interview?
       - Yes → Shortlist
       - No → Continue to consider?

5. **Shortlist**
   - Interview feedback reviewed
     - Will offer be made?
       - Yes → Interview Round 2
       - No → Continue to consider?

6. **Interview Round 2**
   - Interview feedback reviewed
     - Will offer be made?
       - Yes → Offer extended
       - No → Continue to consider?

7. **Offer extended**
   - Offer accepted?
     - Yes → Offer accepted
     - No → Offer Declined

8. **Offer accepted**
   - Appointment approval required?
     - Yes → Appointment approval process
     - No → RPT appointment process

9. **Appointment approved?**
   - Yes → Workday processing
   - No → Not Selected

10. **Workday processing**
1. As each application is received, the application status is set to “Application Received” by the Administrator.

2. The committee chair performs an initial review of all applications and eliminates any applicants who are not qualified.

3. The chair advises the Administrator to assign application status “Under Review” to the remaining applications and “Not Selected” to those deemed not qualified, along with disposition code “Does Not Meet Minimum Qualifications”.

4. Search committee members (Evaluators) review and comment on the remaining applications to determine which should move on to “Longlist” status. Those not chosen to move on are assigned application status “Not Selected” and the applicable disposition code by the Administrator.

5. An attempt is made to schedule all remaining applicants for an interview. The Administrator assigns application status “Interview Round 1” to all applicants who are scheduled to interview. Those who decline an interview or withdraw for any reason are assigned the applicable disposition code.

6. Evaluators conduct interviews and meet to discuss which applicants should move to “Shortlist” status. Those not chosen to move on are assigned application status “Not Selected” by the Administrator, along with the applicable disposition code.

7. Again, attempts are made to schedule the remaining applicants for an interview. The Administrator assigns application status “Interview Round 2” to all applicants who are scheduled to interview. Those who decline an interview or withdraw for any reason are assigned the applicable disposition code.

8. Evaluators conduct interviews and eligible faculty vote on whether to extend an offer. If they wish to extend an offer to the final candidate, the offer approval process commences. Those not chosen to move on are assigned disposition status “Not Selected” by the Administrator, along with the applicable disposition code.

9. If the offer is approved and extended, the Administrator assigns application status “Offer Extended” to the selected applicant.

10. If the offer is accepted and appointment approval is not required, the Administrator assigns application status “Hired”. The new hire’s case is then transferred to Workday to begin the onboarding process.

11. If the offer is accepted and appointment approval is required, application status “Selected” is assigned while the application goes through the appointment process in Interfolio’s Review, Promotion and Tenure (RPT) module.
   a. If the appointment is approved in RPT, the Administrator assigns application status “Hired”. The new hire’s case is then transferred to Workday for the onboarding process.
   b. If the appointment is not approved in RPT, application status “Not Selected” is assigned.

12. If the offer is declined, application status “Not Selected” is assigned and a decision is made to consider other applicants or repost the position.

13. At any time throughout this process, the applicant can voluntarily withdraw their application, which results in assignment of “Application Withdrawn” status.
1. Select "Positions" from the left-hand navigation, and then click on the name of the position you want to view.

2. Click the position title

3. Select one or more applications

4. Click the "Status" button that appears to the right of the page
5. Select the appropriate status to apply to the selected applications

   a. You can also remove a status this way

6. Confirm and notify applicants
   a. In the "Change Status" window you can compose and send an email to the selected applicants about the change. **This is not required.**
You can also assign or change an application status from the Applicant Profile page:

1. Click the applicant's name to open the Applicant Profile

2. Click the change button near the current status to update the Position's status.
Josh Gianitsis

Education Information
M.D., Harvard

Status
n/a

Display

Application Received
Under Review
Longlist
Reference Letters Requested
Interview Round 1
Shortlist
Interview Round 2
Offer Extended
Selected
Offer Accepted
Hired
Offer Declined
Not Selected
Selected - Appointment | Standing
Assigning Tags to Applicants

There are many reasons why a unit might want to tag applicants. Units who have large applicant pools or who want to leverage areas of expertise within their search committee will often use tags to assign applicants to a particular search committee member for the initial review. Tags can also be used to identify particular characteristics of an applicant or applicants (e.g., research focus) which can then help Administrators or Evaluators sort and/or assign them more easily. Administrators and Evaluators can assign tags.

Departments are required to use a tag to display the interview date for any candidate that has been interviewed.

1. Select "Positions" from the left-hand navigation, and then click on the name of the position you want to view.

2. Click the position title.
3. Check the box next to name of applicant(s) you want to tag.

   a. Click "Applicant" at the top of the table to select all applicants.

4. Checking the box next to a name opens a row of buttons to the right of the page.
   a. The buttons that appear here are determined by your permissions in the program.

5. Click the "Tag" button.
6. Select the tag you want to apply, or select "Add new tag" to create a new one.
Assigning Disposition Codes

To support compliance with recruitment audits and the principles behind them, the University of Pennsylvania has established a set of standard applicant disposition codes to identify why an applicant falls out of consideration, i.e., reason for rejection.

Application statuses “Withdrawn” and “Not Selected” require an applicable disposition code. Any applicant who does not receive an offer of employment must be assigned a disposition code before the position can be closed. A best practice is to apply disposition code to groups of applicants throughout the search process and in conjunction to changes in application status rather than waiting until the search is complete. The current list of disposition codes includes:

<table>
<thead>
<tr>
<th>Application Status</th>
<th>Recruiting Disposition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Selected</td>
<td>Does Not Meet Minimum Qualifications</td>
</tr>
<tr>
<td></td>
<td>Meets Minimum Qualifications but Other Candidate(s) Better Qualified</td>
</tr>
<tr>
<td></td>
<td>Unsuccessful Reference Check</td>
</tr>
<tr>
<td></td>
<td>Application Not Reviewed</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>No Call / No Show</td>
</tr>
<tr>
<td></td>
<td>Change in Interest or Availability</td>
</tr>
<tr>
<td></td>
<td>Declined Offer</td>
</tr>
<tr>
<td></td>
<td>Hired - Other Job</td>
</tr>
<tr>
<td></td>
<td>Declined Interview</td>
</tr>
</tbody>
</table>

1. Select "Positions" from the left-hand navigation.

2. Click the position title.
3. Select the applicant from the list of applications.

4. Click "Add" under the Disposition code section of the applicant's profile page.
5. Select the disposition code from the drop down list.

Assign disposition code to multiple applicants:
1. Select multiple applications on the applications page as shown below. This will open a menu bar that includes a "Disposition Codes" button.

![Application Example Image]

6. Click "Disposition Codes" and select the code you want to apply.

![Code Selection Image]

a. The code will display on the applicant profile page of each user.
To change a disposition code

1. Open the applicant's profile page and click "Change" under the Disposition Code section.

2. Select the appropriate code from the drop down list.
   a. To remove the disposition code, scroll to the bottom of the list and select "Remove Disposition Code."
You can also remove the code from multiple applications at once from the list of applications

1. On the applications page, select the applications you want to change, click the "Disposition Code" button, and select "Remove Disposition Code."
Documenting Outreach

See the section **Publishing and Storing your External Ad Publications** on how to attach your published ads to the position.

When you have selected a preferred candidate (one that you intend to hire):

1. Select "Positions" from the left-hand navigation.

![Diagram of Positions section](image)

2. Click the position title.

![Image of search positions](image)

3. Select the applicant from the list of applications.
4. Scroll to the very bottom of the page to the "Notes" section and click “Add Note.

5. Click "Add an Application Note."

   a. **Here is where you will describe your outreach in a narrative.** Please include all advertising at conferences, outreach to other institutions, faculty and scholars contacted, and any other outreach. No additional supporting documentation is required at this time. When you are done, click “Save.” You can go back and edit this note at any time.
Application 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.

We advertised in the following Journals: Academic Keys, American Journal of Clinical Pathology, AWIS, Hispanic Outlook, Insight into Diversity, JBHE, National Medical Association, Society for Hematopathology, Women in Academia, Association of Pathology Chairs.

Save  Cancel
Request a Letter of Recommendation on Behalf of an Applicant

Committee Managers and Administrators can request confidential letters of recommendation directly from recommenders on behalf of an applicant. This allows, for instance, a committee to request recommendations from a list of potential recommenders suggested by the applicant without involving the applicant in the request process.

1. Select "Positions" from the left-hand navigation.

2. Click the name of the position.

3. Select the applicant.
4. Click the "Actions" button and then select "Request recommendation."

5. Fill out the request form, set a due date for the recommendation, and write an email message to recommenders.
   a. Letter writers will receive the message you create along with instructions for submitting the recommendation.
b. You can request recommendations from more than one letter writer at once as shown below.

c. When requesting recommendations from multiple writers, you can use text variables to automatically fill in the first and last name of each letter writer. Do not forget the comma at the end of the text variable.
6. Attach files from the materials submitted by the applicant
   a. Click "Add"
   
   b. Select a document to include with the request

**How to view, resend, or edit and resend a pending request**

The request will display under the "Requested Recommendations" section that appears under Internal Documents once a recommendation is requested.

While it is still pending, you can resend, edit & resend, or cancel the request.
After the first recommendation is requested for the application, new recommendations can be made using the "Request" button and following steps 3 through 5 above.

Once received, the recommendation can be downloaded or read on screen.
Archive or Unarchive an Applicant

Committee Managers (Faculty Coordinators, Applicant Managers) are able to archive and unarchive applications in Interfolio Faculty Search. This can be useful when you have a large number of applicants and wish to reduce the number you are viewing on a regular basis.

Any archived applicants should have been thoroughly reviewed by the committee/committee manager before being archived. Applicants should all have the appropriate status(es) and/or disposition code before being archived.

Applications can be archived and unarchived from the Applications page.

1. Select "Positions" from the left-hand navigation.

2. Click the position title to access applications for the position

3. Select the application(s) to archive
4. Click the "Additional Options" icon (to the right of the page) and select "Archive" to archive the selected applications.

5. To unarchive an application, click the "Filter" button and select "Archived" to the right of the page. This will filter the list to display only archived positions.
b. Select one or more names in the list to unarchive

c. Click the "Additional Options" icon (to the right of the page) and select "Unarchive" to unarchive the selected applications

d. Remember to clear the "Archived" filter to view active applications
Identifying Your Preferred Candidate and Closing Your Search
Identifying Your Preferred Candidate and Completing Your Affirmative Action Requirements

The following steps and process replace the previous Affirmative Action (AA) Form that was created in FADS.

Prior to completing the steps below, please be sure you have completed the following:

- Attached copies of all External Ad Publications as required by the search guidelines (see the “Publishing and Storing your External Ad Publications” section for more information).
  - Please be sure to attach copies of external publications in diversity journals, if applicable.
- Described your Outreach in a narrative in the Application Notes (see the “Documenting Outreach” section for more information).
- Assigned accurate and updated Applicant Statuses to all applicants (see the “Assign or Change an Applicant Status” section for more information).
  - If an applicant was interviewed, be sure that you have assigned either of the “Interview Round” statuses.
  - Add a tag with the interview date for all interviewed candidates (see the “Assigning Tags to Applicants” section for more information).
- Assigned a Disposition Code to any applicant that is not being considered for hire (see the “Assigning Disposition Codes” section for more information).

When you have selected a preferred candidate (one that you intend to hire), and you have completed all of the steps above:

1. Select "Positions" from the left-hand navigation.

2. Click the position title.
3. Select the applicant from the list of applications.

4. Scroll to the very bottom of the page to the "Notes" section and click “Add Note.”

5. Click "Add a Hiring Note."
a. **Here is where you will state why you are hiring this specific candidate.** Please describe all of the reasons as to why this is the best candidate for the position. We are looking for at least three sentences here, but no more than a paragraph. When you are done, click “Save.” You can go back and edit this note at any time.

6. Update the **Applicant Status** to reflect the appropriate appointment in RPT.

<table>
<thead>
<tr>
<th>Application Status Values</th>
<th>Used For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected - Appointment</td>
<td>Standing Tenure Track</td>
</tr>
<tr>
<td>Selected - Appointment</td>
<td>Associated Faculty</td>
</tr>
<tr>
<td>Selected - Appointment</td>
<td>Associated Faculty</td>
</tr>
<tr>
<td>Selected - Appointment</td>
<td>Associated Faculty</td>
</tr>
<tr>
<td>Selected - Appointment</td>
<td>Standing Clinician-Educator</td>
</tr>
<tr>
<td>Selected - Appointment</td>
<td>Standing Clinician-Educator</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td></td>
<td>Senior Ranks</td>
</tr>
<tr>
<td>Selected - Appointment</td>
<td>Standing Tenure Track</td>
</tr>
<tr>
<td>With Tenure Ranks</td>
<td></td>
</tr>
<tr>
<td>Selected - Appointment Approval not Required</td>
<td>Utilized for Academic Support Staff “Preferred Candidate”</td>
</tr>
</tbody>
</table>

7. Assigning the above status (with the exception of “Selected – Appointment Approval not Required”) will kick-off the case creation in Review, Promotion, and Tenure (RPT) so that you can begin building the online dossier for the candidate.

8. FAPD will review the appropriate documentation associated with each search and, if no updates are required, will move the appointment case to the department for building.
   a. If updates are required to the documentation in Faculty Search, FAPD will reach out with those requirements.
Closing a Position

Committee Managers and Administrators can close a position when applications are no longer being considered, either because a hire has been made or because the search was unsuccessful.

When closing a position, Committee Managers or Administrators are asked to indicate which applicants were selected to fill the position, and if no applicants were selected, to leave a note to document why no selection was made.

1. Select the position you want to close from the list of positions.

2. Click "Position Actions" button at the top right of the screen.

3. Select "Close Position" from the dropdown menu.
4. Indicate whether or not an applicant was selected to fill the position.
   a. If no applicant was selected, leave a note to document why no selection was made, and click the "Close Position" button.
   b. If one or more applicants was selected, select “Yes” then "Add Applicants."
i. A list of available applicants will appear as shown below. Click "Add" to add the selected applicants (you may select more than one applicant). You can search the list of available applicants by name, or email address, and filter the list by application status.

![Add Selected Applicant](image)

ii. Click "Close Position" at the bottom left of the page when all of the applicants selected to fill the position have been added.

![Closing Position](image)

**Updating the Position Status**

Once you close a position, you should select an appropriate position status to indicate the position's closed state.

1. Back on the position page, locate the current status at the top of the page, and click the "Change" link. **Note** – the position's closed state is indicated in parentheses, but it is still a good idea to officially change the status when closing the position.
2. Update the position status to “Position Filled” or “Position Not Filled” depending on the outcome of the search.

3. Confirm that you want to change the status. **Note** – you can elect to send a message to applicants notifying them of the change in status.

The position is now closed. **Note** – The application link will be unpublished and no longer accessible to applicants.

The position will no longer appear in the list of active cases but will appear in the list of closed (archived) positions viewable by filtering the list of positions.
If you need a closed position reopened, please reach out to FAPD.
Reporting
Run an Applications or Positions Report

Applications Reports and Positions Reports allow Administrators to pick and choose from an extensive list of applicant and position data fields to create a customized report, which can be viewed onscreen, saved and recalled, and downloaded as a CSV file.

5. Select the Reports option from the navigation bar.


6. Select a set of filters. By default you can filter by unit, status, degree, tags, name, position, etc.
b. You can sort by application ratings, completeness, choose to view only selected or rejected applicants, and view archived or withdrawn applications.

c. You can also filter by date of final submission, and date of first submission, and filter by responses to form questions.
To filter by form responses:

1. Click "Filter by Form Responses" and select the form, question, and response.

![Filter by Form Response](image)

Add custom columns of information

1. Click the "Columns" button and select or deselect columns to add'.
   a. There is an extensive list of possible columns including information about applicants (telephone, email, city, state, ratings, etc.) information about positions (dates, committee members, salary range and so on). You can even add a column to see responses to one or more form questions.
View and/or download the results

1. The list will display your custom columns and applied filters. Click "Download CSV" to save a spreadsheet file of the results.
1. Click "Save" and give your report a name. This saved report will recall this set of filters and columns later.

2. Click "Saved Reports" to recall a report at any time.
Running an EEO Report

Administrators, Committee Managers and DSAs in Interfolio Faculty Search can generate a Forms Report that provides a visual representation of data collected from EEO/Self-ID questionnaires and custom application forms. The report data can be displayed onscreen or downloaded as a .csv file for use in spreadsheet programs.

Access to EEO form reports is restricted accordingly to those with partial or full access to EEO information at your institution. Any Committee Manager, Administrator, or EEO Officer can view a summary of data collected with EEO forms for the units or positions to which they have access, as long as there are six or more applicants. DSAs and School Administrators can view a report of detailed applicant responses to EEO forms. Committee Managers cannot view or pull a report on individual responses to EEO forms.

1. Select the Reports option from the navigation bar.

2. Select the “Form Report” tab.

3. Select a unit.
4. Select the position(s) to include in the report.

5. Select the form(s) on which you want a report. To review EEO/Self-ID data, select the “Request for Voluntary Self-Identification” form.
   a. Click “Select All” to view this information for all positions with the selected unit.
6. Click "View Report" to view the data online, or "Download (CSV)" to download the data in a spreadsheet file. If you select “Request for Voluntary Self-Identification” form, and you are a DSA, you can choose to view a "Response Summary" or "Detailed Applicant Responses" to the form (see additional information below). Note – This option will not appear for Committee Managers or Administrators who do not have access to EEO information.
a. The "Response Summary"

1. The "Response Summary" report is available to any Committee Manager, Administrator or EEO Officer with access to a position or the unit in which that position resides.
2. The "Response Summary" provides a summary, detailed category view, and overview of the applicant pool responding to the Request for Voluntary Self-Identification questions. Results can be displayed onscreen or downloaded via .csv file. Both will display your questions & responses, along with a breakdown of the number of responses and response percentage for each answer value.
b. "Detailed Applicant Responses"

1. The "Detailed Applicant Response" report is available only to DSAs. Committee Managers are not able to pull this type of report under any circumstance. Results can be displayed onscreen or downloaded via .csv file. Both will display the applicant's name and responses to each of the questions included in the Request for Voluntary Self-Identification.

7. When the report displays, click "Report Link" to open or bookmark a permanent link to the report, or you can copy and paste a link to share the report. **Note** – This links to the EEO report for this specific search only.
Resources Coming Soon

- DSAs – How to Engage in the Search Process in Interfolio Faculty Search
- Reviewing candidates
  - Comments – publicly available to anyone on the committee
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