

## Interfolio

**Login:** use the Interfolio Search Link in FSRP or via <https://account.interfolio.com/sso>

Interfolio is the source system for FSRP. It will take up to 1 hour for updates in Interfolio to be reflective in FSRP. Therefore, the following information must be completed prior to submitting for the approval process through FSRP.

- Manage the stages of a search using the position status, such as *Accepting Applications*, *Reviewing Applications*, *Longlist / Initial Interviews*, etc.
- Add **all** applicants to the applicant list and be sure all have the appropriate status and disposition codes for those that did not move forward to full campus interview.
- For the required documents, the proper document type: *C.V.* and when necessary, *Confidential letters of recommendation or evaluation* must be used so the files can be pulled into FSRP.
- Add all search committee members.
- The Applicant Status must be set to *Full / Campus Interview*, and no disposition codes, yet, on the applicants that have been selected by the committee for approval.
- The Position Status must be *Short List/Final Candidate(s)*. If you are ready to submit the FSRP record, be sure all updates have been made on the applicant statuses, then change the position status to *Short List/Final Candidate(s)*. This is the combination needed to submit for approval via FSRP for full interviews.

NOTE: if the chevron status in FSRP was already at short list stage, and updates were made on the applicants, in Interfolio, you will need to toggle back to a previous position status; wait through the 1hr update cycle (see the chevron move in FSRP, then select the *Short List/Final Candidate(s)* position status once again and wait for the 1 hour update cycle to process so the updates are pulled in FSRP and then proceed with the edits in FSRP as stated below.

This is the process to apply for those special cases where a search has been approved for more than one position and needs to be submitted again in FSRP for the other round of applicant(s).

Once approved in FSRP, continuing in Interfolio:

- Change the position status to, *Offer Stage*; this denotes that the search position has moved into the next stage.

If the offer is accepted and the new hire is in Workday or heading there, or if the offer has been declined:

- Update the applicant statuses and the disposition codes a must for all.
- Close the search in Interfolio with the proper position status and be sure **ALL** applicants have a status and disposition code.

*Reminder: All searches in Interfolio are subject to approval prior to posting an academic job search position.*

- Position description/qualifications
- Hiring plan is included if your school requires it.
- Required Documents selected with the proper type, labeled correctly and have instructional text if necessary.

## Faculty Search Reporting Process (FSRP)

**Login:** <https://yale-hr.lightning.force.com/>

Submit for approval in FSRP - please review, make edits to complete the following areas:

- Search Details section
  - Department Chair (enter your chair or chief)
  - Approval Process (select the one that fits best; contact your dean's office if you're uncertain.)

- Contact Person (enter your name)
- Additional Search Details section
  - Review and make edits in all the appropriate fields, that apply.
  - How many positions approved for search? (Enter a numerical value)
- Recruitment Efforts section \*\*\*\* **This is a must**\*\*\*\*
  - Recruitment Efforts Explanation
- Applicants section: – View All
  - Applicant Status should be set to, *Full / Campus Interview*, on the short-listed applicants that are to be reviewed and approved, no disposition codes yet.
  - All other applicants must have a status and a disposition code.
  - Files section – Each short-listed applicant should have:
    - CV
    - Confidential letters of recommendation or evaluation imported from Interfolio *per search requirement*.
- For each short-listed or *Full / Campus Interview* applicants:
  - Review their Applicant Details.
  - Edit the **Candidate Details** section.
    - Track, Appointment Rank, Tenured appointment or YSM Continuing
    - Proposed Appointment Start Date
    - YSM only, YSM RFP# searches,
    - All other fields are helpful, confirm with your dean’s office if necessary.
- Required Advertisement section.
  - Upload one job ad invoice and screenshot of the add. This is required; It is proof that an Ad was published for 30-days in a professional journal, etc.
- Committee Member section: View All
  - from the far right on the list, Edit and select the Committee Role – Chair or Member; Leave all others blank if not a member of the committee – no need to remove.
- Submit for Approval – upper right button.
  - Position status must be Shortlist/Final Candidates and all the above has been done,
  - Add a memo to the reviewer/ approver in the box when submitting.
  - Emails will automatically be sent to approvers.
  - Note: The Approval Process from Search Details section determines the approval workflow.