

A little part of Interfolio for October's Monthly Information Session

Office of Faculty Administrative Services

October 2019

Today's topics

- Review, Promotion & Tenure (RPT)
 - Templates update
 - Case Type
 - Search for candidate
 - Reminder
- Faculty Search (FS)
 - Current to future use - Approval steps
 - Review
 - Reminder

Template List update

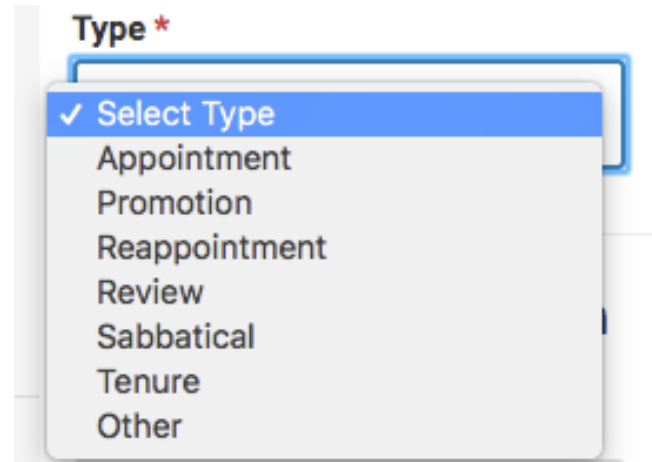
- What is getting updated? – renaming of template titles to:
 - reduce the number of templates
 - use the case types
 - reduce the use of wrong templates
- Who's making the updates?
 - FAS Dean's Office (has made)
 - Provost's office (is working with the professional schools)

Examples:

- *Was, Appointment to Tenure – Specify AOPT or Prof or Promotion to Associate with Tenure*
 - Now, Initial Appointment or Promotion to Tenure –AOPT
- *Was Promotion to full Professor or Appointment to full Professor*
 - Now is Professor

Template List update

- Why?: To take advantage of the Case Type list when you create the Case. You will need to know the type.



- When? Changes have been made in FAS and updates are on-going now with professional schools via Provost's office.

Create Cases, that is what you do Cases

The image shows a screenshot of the Yale University Case List interface. The main header is dark blue with the Yale logo and the text 'Yale University > Case List'. A sidebar on the left contains navigation links: Home, Faculty Search, Positions, Templates, Administration, Reports, Users & Groups, Review, Promotion and Tenure, Cases (highlighted with a red box), Templates, Administration, Reports, and Users & Groups. The main content area shows a search bar for 'Search cases', a dropdown for '25 of 127 cases', and a list of cases. The first case is 'New Candidate' for 'Near Eastern La' with a status of 'Case Created: Waitin'. The second case is 'New Candidate' for 'School of Archi' with a status of 'Case Created: Waitin'. An 'Add New Case' modal is open in the center, titled 'Add New Case' with a close button. It prompts the user to 'Please select an organizational unit for this case.' and provides a 'Browse By Unit' section with a search bar. The units listed are: Yale University, Academic Unit (Test) (with sub-items: Academic Unit, Divinity School), and Divinity School (with sub-items: Divinity School and Department of Religious Studies, Divinity School -use the top level unit, Divinity School/ Institute of Sacred Music). At the bottom of the modal are 'Confirm' and 'Cancel' buttons, with 'Confirm' highlighted by a red box. In the background, a 'Create Case' button is also highlighted with a red box.

Yale University > Case List

Search cases

25 of 127 cases

Name ▾

New Candidate
Near Eastern La
Case Created: Waitin

New Candidate
School of Archi
Case Created: Waitin

Add New Case

Please select an organizational unit for this case.

Browse By Unit

Search

Yale University

Academic Unit (Test)

Academic Unit

Divinity School

Divinity School and Department of Religious Studies

Divinity School -use the top level unit

Divinity School/ Institute of Sacred Music

Faculty of Arts and Sciences

Confirm Cancel

Create Case

Template list when you create a Case

Theme From Mahogany (Do You Know Where Going To)

Diana Ross

Do You Know
Where you're going to?
Do you like the things?
That life is showing you
Where are you going to?
Do you know?

Do you get?
What you're hoping for?
When you look behind you
There's no open doors
What are you hoping for?
Do you know?

Once we were standing still, in time
Chasing the fantasies and feeling all nice
You knew how I loved you, but my-spirit was free
Laughing at the questions
That you once asked of me

Now looking back at all we've had
We let...

Yale University > Cases >

New Case

~~Blank Case~~

~~A Blank case that can be customized to match your requirements~~



Appointment to Professor Adjunct

Preview

Use this template to create a case for appointment to Professor Adjunct



Promotion to Associate Professor Adjunct

Preview

Use this template to create a case for promotion to Associate Professor Adjunct



Promotion to Associate Professor on Term (History)

Preview

Use for creating promotion to assoc. prof. on term w/o tenure (AOPN) cases to be reviewed by the Dept. as well as the Tenure Appointments Committee.



Initial Appointment or Promotion to Tenure - AOPT (History)

Preview

Use this to build an initial appt or promotion to tenure (AOPT) case to be reviewed by the Dept. as well as the Tenure Appointments Committee



Initial Appointment or Promotion to Tenure - Professor (History)

Preview

Use this to build an initial appt or promotion to tenure (Professor) case to be reviewed by the Dept. as well as the Tenure Appointments Committee



Promotion to Professor, AOPT to PROF (History)

Preview

Use to create promotions from Assoc. Prof. w/tenure to Professor cases to be reviewed by the Dept. as well as the Tenure Appointments Committee



Reappointment to Assistant Professor (FASTAP '16) (History)

Preview

For reappointment to assist. prof. (FASTAP '16) cases, reviewed by the Dept. as well as the Tenure Appointments Committee



Promotion to Professor in the Practice

Preview

This template will be used for the review of Promotion to Professor in the Practice.



Appointment to Joint Assistant Professor

Preview

Use this template to create cases when a current Assistant Professor is seeking a joint appointment in this department for proper review and voting.



FAS Dept Review - Reappointment - Assistant Professor (FASTAP '07)

Preview

All FAS depts: 3rd year review for Assistant Professor reappointment FASTAP 07. Reviewed by Dept, Dept Faculty Vote submitted to

After Confirming your unit, the New Case template list is shown

- Ask (and answer yourself) what rank is this faculty member going to be (already here at Yale) or coming in at (new to Yale)?
- If you don't have answer, then contact us.
- To select a template, click on the words of the title
- But wait, there's more....

Yale University > Cases >
New Case

~~Blank Case~~
A blank case that can be customized to match your requirements

Appointment to Professor Adjunct Preview
Use this template to create a case for appointment to Professor Adjunct
Promotion to Associate Professor Adjunct Preview
Use this template to create a case for promotion to Associate Professor Adjunct
Promotion to Associate Professor on Term (History) Preview
Use for creating promotion to assoc. prof. on term w/o tenure (AOPN) cases to be reviewed by the Dept. as well as the Tenure Appointments Committee.
Initial Appointment or Promotion to Tenure - AOPT (History) Preview
Use this to build an initial appt or promotion to tenure (AOPT) case to be reviewed by the Dept. as well as the Tenure Appointments Committee
Initial Appointment or Promotion to Tenure - Professor (History) Preview
Use this to build an initial appt or promotion to tenure (Professor) case to be reviewed by the Dept. as well as the Tenure Appointments Committee
Promotion to Professor, AOPT to PROF (History) Preview
Use to create promotions from Assoc. Prof. w/tenure to Professor cases to be reviewed by the Dept. as well as the Tenure Appointments Committee
Reappointment to Assistant Professor (FASTAP '16) (History) Preview
For reappointment to assist. prof. (FASTAP '16) cases, reviewed by the Dept. as well as the Tenure Appointments Committee
Promotion to Professor in the Practice Preview
This template will be used for the review of Promotion to Professor in the Practice.
Appointment to Joint Assistant Professor Preview
Use this template to create cases when a current Assistant Professor is seeking a joint appointment in this department for proper review and voting.
FAS Dept Review - Reappointment - Assistant Professor (FASTAP '07) Preview
All FAS depts: 3rd year review for Assistant Professor reappointment FASTAP 07. Reviewed by Dept, Dept Faculty Vote submitted to

Case Information: Type, is part of the answer to the question

Yale University > Cases > New Candidate >

Case Information

Type *

Select Type

Type *

- ✓ Select Type
- Appointment
- Promotion
- Reappointment
- Review
- Sabbatical
- Tenure
- Other

Candidate Information

Search for a Candidate

Search for Candidate

Candidate's First Name *

Candidate's Last Name *

Candidate's Email *

Will the candidate be involved in this evaluation?

Yes No

Choose "Yes" if the candidate will submit their own materials and you would like to communicate with them during the evaluation period. Note: This setting cannot be changed after this step.

Case Data Forms

Case data forms can be used to include additional information about candidates at your institution and will not be visible to the candidate. Case Data forms can be created on the [Administration](#) page.

[Add Case Data Form](#)

[Save & Continue](#) [Return to Case Summary](#)

Creating a Case

- 1 Case Information
- 2 Candidate Requirements
- 3 Internal Case Sections
- 4 Case Review Steps
- 5 Case Summary

New to Yale = Appointment

Here at Yale = Promotion

Case Information: Search for a Candidate – what is this?

Yale University > Cases > New Candidate >

Case Information

Type *

Select Type ▼

Candidate Information

Search for a Candidate

Search for Candidate ▼

Candidate's First Name * Candidate's Last Name * Candidate's Email *

First Name Last Name Ex.: jane.doe@university.com

Will the candidate be involved in this evaluation?

Yes No

Choose "Yes" if the candidate will submit their own materials and you would like to communicate with them during the evaluation period. Note: This setting cannot be changed after this step.

Case Data Forms

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Allows you to add files from past cases

The screenshot displays a web interface for managing case documents. It is divided into two main sections: 'Internal Sections' and 'Candidate Packet'.

Internal Sections: This section contains three expandable categories:

- Committee Documents:** Includes an 'Edit' button and an 'Add File' button.
- External Evaluations:** Includes a 'Request Evaluation' button and an 'Add File' button.
- Course Evaluations:** Includes an 'Edit' button and an 'Add File' button.

Candidate Packet: This section includes a 'Candidate Documents' area, which is currently 'Locked'. It features an 'Unlock' button and an 'Add File' button. Below this, it indicates 'Current CV 1 required' and has a table with columns for 'Title', 'Details', and 'Actions'.

Add File Dialog (Inset): This dialog is titled 'Add File' and has two tabs: 'Add New File' and 'Previous Reviews'. The 'Previous Reviews' tab is selected. Below the tabs is a 'Select Case *' dropdown menu with the text 'Select review'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

A red arrow points from the 'Add File' button in the 'Committee Documents' section to the 'Previous Reviews' tab in the 'Add File' dialog. A red box highlights the 'Add File' buttons in the 'Committee Documents', 'External Evaluations', 'Course Evaluations', and 'Candidate Documents' sections.

Note: If you add a file to the Candidate Document area, the faculty member will be notified and will be able to edit, remove, or accept that document.

Reminder: Best to have candidate involved with the review and remember to add the letter

Yale University > Cases > New Candidate >

Case Information

Type *

Select Type

Candidate Information

Search for a Candidate

Search for Candidate

Candidate's First Name *

First Name

Candidate's Last Name *

Last Name

Will the candidate be involved in this evaluation?

Yes No

Choose "Yes" if the candidate will submit their own materials and you would like to receive them during the evaluation period. Note: This setting cannot be changed after this step.

Case Data Forms

Case data forms can be used to include additional information about candidate visible to the candidate. Case Data forms can be created on the [Administration](#)

[Add Case Data Form](#)

[Save & Continue](#) [Return to Case Summary](#)

Yale University > Cases > New Candidate >

Candidate Requirements

Candidate's Packet Due

Mmm d, yyyy

Instructions To Candidate

Customize instructions to the candidate about assembling their packet and any other procedures, policies, or deadlines at your institution. You can also include links to required forms and online resources such as instructions or handbooks outlining your policies.

PASTE letter (this is the condensed version of the letter) soliciting materials from internal candidate for initial promotion to tenure (Prof) in the Social Sciences. BE SURE TO REMOVE THESE LINES, ADD the appropriate Dates, Names and make the correct Selection within these instructions.

Packet Requirements

[Add Section](#)

Create packet sections for materials you would like to receive from a candidate. Each section can contain a due date, a description, and requirements for particular materials (e.g., CV, teaching statement, syllabi).

Candidate Documents [Add Requirement](#)

Documents

Current CV 1 required

Provide a copy of your most current and comprehensive CV. Please reference the letter from your chair for details. Name this

Creating a Case

- 1 Case Information
- 2 Candidate Requirements**
- 3 Internal Case Sections
- 4 Case Review Steps
- 5 Case Summary

The letter is the instructions to the candidate.

The image shows two screenshots from a university application portal. The left screenshot, titled 'Packet Requirements' for Rita A. Bookman, features a 'View Packet Instructions' button highlighted with a red arrow. Below it is a 'Candidate Documents' section with a progress indicator for 'INCOMPLETE' and a list of documents including CV, Cover Letter, Publications, Letter of Recommendation, Tenure Application Form Part II, and Table of Courses Taught. A 'Review & Submit' button is at the bottom. The right screenshot, titled '3 year review' for The University of Interfolio, shows a 'Candidate Instructions' section with a 'View Instructions' button highlighted by a red arrow. Below this is a 'Candidate Documents' section with a 'Not Yet Submitted' status and a table of requirements.

Type	# Required	# Added
Video	1 required	0
Additional Documents	0 required	0

Today's topics

- Review, Promotion & Tenure (RPT)
 - Templates update
 - Case Type
 - Search for candidate
 - Reminders: Add/paste the letter to candidate especially if candidate will be involved with this case
- **Faculty Search (FS)**
 - Reminders – approval steps
 - Updates/ fixes
 - Review - Optional required documents for Open Rank positions

Currently: New positions (for some schools) are submitted for approval- 1 step

Demo University > Positions > Assistant Professor of American Literature >

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](#)

Position Title
Assistant Professor of American Literature

Demo University > Assistant Professor of American Literature >

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. You will receive an email once the position has been approved by all approvers.

Position
Assistant Professor of American Literature

Send To
Step 1 of 3: Budget Office

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

From Name **Reply to email address**
Bill Burger xxd@demo.com

Subject *

Message *

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FAS is looking to move to a 4-Step approval process for next year's searches and other schools maybe adding the approval process



Review:

Options are available for open rank positions

Open rank is when the job posting is searching for someone in a broad manner – individual can range from an assistant professor level up to a full professor.

Typically the requirements vary for these ranks, for example, Confidential Letter of Recommendations or Evaluations

The screenshot displays a user interface for managing job requirements. On the left, a list titled "5 Documents Required" shows three items: "Cover Letter" (with a sub-note "Please address letter to Janet Price..."), "CV.", and "Confidential Letter of Recommendation or Evaluation". Each item has edit and delete icons. A red square highlights the edit icon for the "Confidential Letter of Recommendation or Evaluation" item. A modal window titled "Add Document Requirement" is open on the right, featuring a close button (X) in the top right corner. The modal contains three fields: "Document Type" (a dropdown menu currently set to "Cover Letter"), "Number Required" (a dropdown menu currently set to "0"), and "Requirement Note" (a text area containing the text: "Add your note here. For example: Non-tenured applicant please provide three letters. Tenured applicant may skip this requirement."). At the bottom of the modal are "Save" and "Cancel" buttons. A small tooltip on the right side of the main interface reads "REQUIRE Customi using our you need".

Reminder:

Academic Jobs Listings - Office of the Provost website

All faculty and academic positions that are open and active in Interfolio are posted automatically on

<https://academicpositions.yale.edu/>

Linked from Office of the Provost, <https://provost.yale.edu/> under Faculty Resources > Faculty Positions

or

Your.Yale.edu under Careers > Search Jobs > Faculty and Academic Positions

Academic Job Listings

Office of the Provost

Yale University is committed to recruiting diverse, excellent, and dedicated faculty, post-docs, and other scholars. We invite you to apply to the following openings.

If you have questions regarding a particular posting, please contact the department or school. If the contact information is not included in the posting, [visit the online directory](#).

For curatorial, librarian, athletics, and other staff positions, [please visit Careers at Yale](#).



Search open academic positions

[ADVANCED SEARCH >](#) [CLEAR SEARCH >](#)

SEARCH

Viewing 257 open positions

TITLE	ACADEMIC UNIT	LOCATION	OPEN DATE

Thank you and Have a Nice Day!

Questions:



Introduction and review

Faculty Search (FS)

- Collects all application materials for those that are applying to a faculty job posting.
- Provides a means for all search committee members (Yale faculty) to review and make comments and/or ratings on each applicant to determine who will make the cut to come in for an Interview, to be a Final Candidate(s)/Shortlist and then be Hired.
- Offers a secure way to reference writers to upload their confidential letters
- Also helps to keep Yale in compliance since every applicant that applies is provided with an EEO form.

Review, Promotion and Tenure (RPT)

- Collects materials, but for one individual, the candidate's packet or Case.
- Organizes candidate's packet – Yale faculty that are up for review for reappointments, promotions (internal candidates) and appointments to tenure (external candidates coming from outside of Yale)
- Has workflow that allow this packet of materials, to be presented to multiple committees at different stages of the review process
- Each case is presented to their departments for a faculty vote
- But only tenured cases both for internal and external candidates need to be presented to a Tenure Appointment Committee (TAC) or a Standing Advisory and Appointments Committee (SAAC).