

Interfolio: Faculty Search updates

Office of Faculty Administrative Service, September 2023

- Why the changes?
- What are the updates in Faculty Search (FS)?
- Position Statuses
- Applicant Statuses
- Disposition Codes
- How and When to apply the statuses and codes?
- Required Documents
- Display view of the applicant list
- Introduction to Faculty Search Reporting Process (FSRP)



Why the changes in Interfolio?

Yale

- To keep Yale in compliance
 - Audits from the Department of Labor (DOL); Office of Federal Contractor Compliance Programs (OFCCP) will be looking for disposition codes
- To align with the new FSRP system (the FSQ replacement)
 - Updates on some of the Position and Application Statuses to help and better align with the new Deposition Codes as well as with FSRP
 - Interfolio is the system of record for Faculty Search Reporting Process (FSRP)
- To avoid the 11th hour rush
 - Candidate approvals are done at the shot-list stage and no longer at the final candidate stage

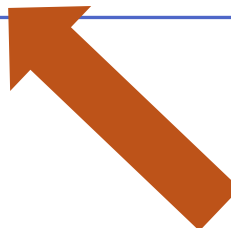
FSRP – earlier approval of the short list

The FSQ timeline (the 11th hour rush to make the offer)

Reviewing Applications	Longlist selected	Interviewing Finalist	Pending Approval - Final Candidate	Position Closed
		Preliminary approval to start arranging interviews	Final approval needed here before making an offer. The Short list /Final Candidate already interviewed Committee is ready to make an offer. One (or two) selected and marked with an asterisk, *, noting that's the one to whom offer is to be made. BUT approval needed first	

The new FSRP timeline (aligns better with the process and has better timing for making an offer)

Reviewing Applications	Longlist / Initial Interviews	Short List / Final Candidate(s)	Offer Stage	Search Closed with Hire
		The approval now happens at this stage Full / Campus Interview Search Committee has time to meet and decided	Committee has time to work on an offer letter with all proper parties and Deans, Chairs and Provost's office The committee can move when a candidate is identified as the one.	



Position Statuses

(The Search stage)

- Accepting Applications
- Reviewing Applications
- **Longlist / Initial Interviews**
- **Short List / Final Candidate(s)**
- **Offer Stage**
- **Search Closed with Hire**
- **Search Closed without Hire**

The screenshot shows the Yale University Positions page for an 'Assistant Professor' position. The page includes a 'Start Tour' button and a 'Position Actions' dropdown menu. The 'Status' is currently 'Accepting Applications' with a 'change' link. The 'Opens' date is 'Sep 8, 2022' and the 'Closes' date is 'Jan 31, 2023'. The 'Applicants' section shows a search bar and a list of 25 of 265 applicants. A modal is open for changing the position status to 'Accepting Applications'. The modal lists several status options: 'Longlist / Initial Interviews', 'Short List / Final Candidate(s)', 'Offer Stage', 'Search Closed with Hire', and 'Search Closed without Hire'. Below these options are two checkboxes: 'Applicants can update their application materials while this status is active' and 'Evaluators can review applications while this status is active'. The modal also has 'SAVE' and 'CANCEL' buttons. An orange arrow points to the 'change' link in the 'Status' field.

Yale University > Positions >

Assistant Professor,

Unit: School of Ma

Status: Accepting Applications [change](#)

Opens: Sep 8, 2022

Closes: Jan 31, 2023

Applicants

Search by name, education, or status

25 of 265 Applicants Shown.

Applicant Name

POSITION STATUS:

Accepting Applications

- Longlist / Initial Interviews
- Short List / Final Candidate(s)
- Offer Stage
- Search Closed with Hire
- Search Closed without Hire

☒ Applicants can update their application materials while this status is active

☒ Evaluators can review applications while this status is active.

[SAVE](#) [CANCEL](#)

Filter

Saved Views

COLUMNS

My Overall Rating

Application Statuses

- **Not Selected**
- Longlist
- **Initial Interview**
(phone/video/conference)
- **Full / Campus Interview**
- Offer Extended
- Hired
- Offer Declined
- Withdrew before offer

Yale University > Positions >

Assistant/Associate/Full Professor, Microelectronics

Start Tour Position Actions

Unit	Status	Opens	Closes
Electrical Engineering	Short List / Final Candidate(s) change	Oct 11, 2021	Sep 28, 2022

Applicants

Search by name, education, or status

4 of 4 Applicants Shown.

READ EMAIL STATUS TAG + DISPOSITION CODE DOWNLOAD ARCHIVE

Applicant Name	Date of Initial Submission	Status	Tags	Disposition Codes	My Overall Rating
<input checked="" type="checkbox"/> E... .. Ph.D. - Doctor of Philosophy, University of California Santa Barbara Complete	11/27/21 09:02 PM EST	Not Selected	Invite		☆☆☆☆
<input checked="" type="checkbox"/> F... .. Ph.D. - Doctor of Philosophy, University of California, Santa Barbara Complete	10/28/21 02:54 PM EDT	Not Selected	Invite		☆☆☆☆
<input checked="" type="checkbox"/> L... .. Ph.D. - Doctor of Philosophy, UCLA Complete	02/28/22 03:26 PM EST	Full / Campus Interview	Invite		☆☆☆☆

New Disposition Codes

These codes have been vetted by the Office of the Provost as well as the Office of General Counsel.

Select the Applicants via the checkbox and click on the code and click Apply.

Yale University > Positions >

Testing approval steps

Unit: Academic Unit (Test) | Status: Reviewing Applications [change](#) | Opens: Aug 31, 2023

Applicants

Search by name, education, or status

1 of 1 Applicants Shown.

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status
<input checked="" type="checkbox"/>	Audrey B Incomplete	01/19/23 01:54 PM EST	

25

Top navigation: READ EMAIL STATUS TAG + DISPOSITION CODE DOWNLOAD ARCHIVE

Modal: Apply Disposition Code

- ☐ Not selected: incomplete application
- ☐ Not selected: does not meet minimum criteria for position
- ☐ Not selected: less relevant qualifications and/or experience
- ☐ Not selected: not best match for job criteria relative to other candidate(s)
- ☐ Candidate withdrew from search
- ☐ Offer extended
- ☐ Offer accepted
- ☐ Offer declined
- ☐ Search canceled
- ☐ Search postponed

Buttons: APPLY REMOVE DISPOSITION CODE

- Not selected: incomplete application
- Not selected: does not meet minimum criteria for position
- Not selected: less relevant qualifications and/or experience
- Not selected: not best match for job criteria relative to other candidate(s)
- Candidate withdrew from search
- Offer extended
- Offer accepted
- Offer declined
- Search canceled
- Search postponed

- Disposition Codes give the reason why applicants/candidates did not proceed in the next step of the search process
- Reason why the applicant did not make the cut to the next round of reviews
- Reasons why the applicant was removed from consideration to move on to the next stage of the search

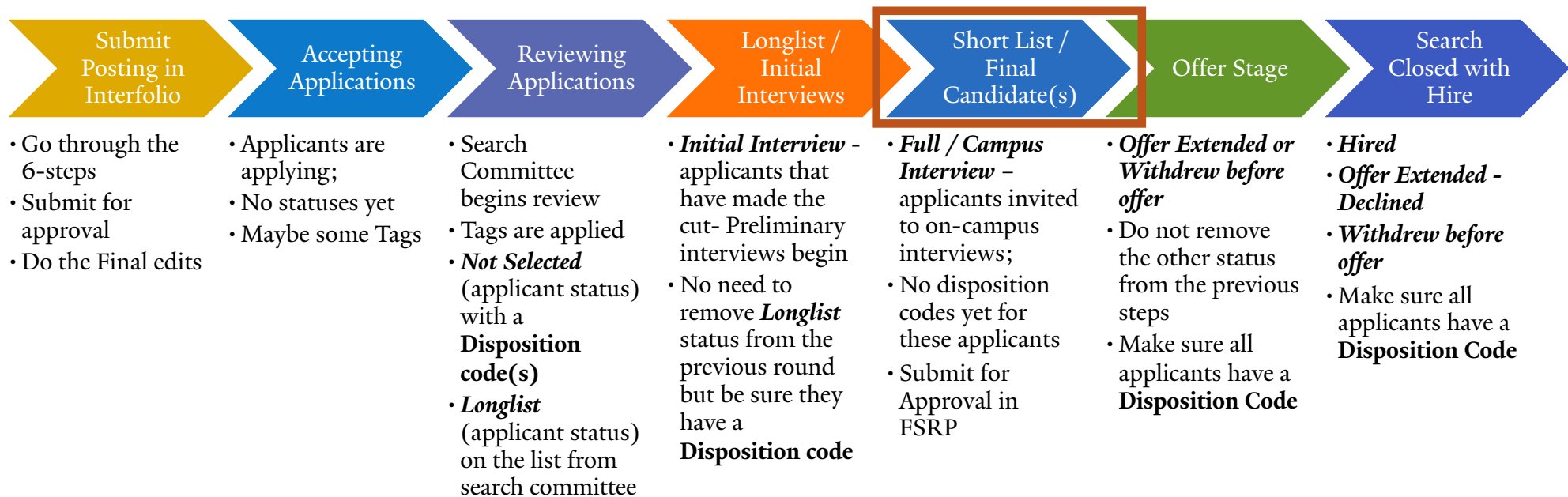
Bottom Line: per Department of Labor, OFCCP-

All applicants must have an Applicant Status and a Disposition Code especially if they did not move forward to the next step in the review process (search stage)

Position Status	Applicant Status	Disposition Code
Accepting Applications	None yet	None yet
Reviewing Applications	<ul style="list-style-type: none"> - Not Selected - Longlist 	<ul style="list-style-type: none"> - Not selected: incomplete application (1) - Not selected: does not meet minimum criteria for position (2) - Not selected: less relevant qualifications and/or experience (3) - Not selected: not best match for job criteria relative to other candidate(s) (4)
Longlist / Initial Interviews	<ul style="list-style-type: none"> - Initial Interview (phone/video/conferences) 	<ul style="list-style-type: none"> - Not selected: less relevant qualifications and/or experience - Not selected: not best match for job criteria relative to other candidate(s) - Candidate withdrew from search (5)
Short List /Final Candidate(s)	<ul style="list-style-type: none"> - Full / Campus Interview 	<ul style="list-style-type: none"> - Not selected: less relevant qualifications and/or experience - Not selected: not best match for job criteria relative to other candidate(s) - Candidate withdrew from search
Offer Stage	<ul style="list-style-type: none"> - Offer extended 	<ul style="list-style-type: none"> - Offer extended (6) - Not selected: less relevant qualifications and/or experience - Not selected: not best match for job criteria relative to other candidate(s) - Candidate withdrew from search
Search Closed with Hire	<ul style="list-style-type: none"> - Hired - Offer Declined 	<ul style="list-style-type: none"> - Offer accepted (7) - Offer declined (8) - Candidate withdrew from search
Search Closed without Hire	<ul style="list-style-type: none"> - Offer Declined - Withdrew before offer - Not Selected 	<ul style="list-style-type: none"> - Offer declined - Candidate withdrew from search - Search canceled (9) - Search postponed (10)

Interfolio Faculty Search process; the stages of a search

Yale



To Submit for Approval, the position status must set to Short List / Final Candidate(s) and each applicant must have the status Full / Campus Interview

The most important status combination

- Position status is, **Short List / Final Candidate(s)** and Applicant status set to, **Full / Campus Interview** and no disposition codes on these applicants, yet
- All other applicants need to have a status and a disposition code

Yale University > Positions >

Assistant/Associate/Full Professor, Microelectronics

Unit: Electrical Engineering

Status: Short List / Final Candidate(s) [change](#)

Opens: Oct 11, 2021

Closes: Sep 28, 2022

Applicants

Search by name, education, or status

Filter | Saved Views | COLUMNS

4 of 4 Applicants Shown.

<input type="checkbox"/> Applicant Name ^	Date of Initial Submission	Date Updated	Applicant Status	Tags	Disposition Codes	My Overall Rating
<input type="checkbox"/> E Ph.D. - Doctor of Philosophy, University of California Santa Barbara Complete	11/27/21 09:02 PM EST	01/04/22 02:27 AM EST	Full / Campus Interview	Invite +		☆☆☆☆☆
<input type="checkbox"/> R Ph.D. - Doctor of Philosophy, University of California, Santa Barbara Complete	10/28/21 02:54 PM EDT	10/28/21 02:54 PM EDT	Full / Campus Interview	Invite +		☆☆☆☆☆
<input type="checkbox"/> L Ph.D. - Doctor of Philosophy, UCLA Complete	02/28/22 03:26 PM EST	02/28/22 03:26 PM EST	Full / Campus Interview	+		☆☆☆☆☆
<input type="checkbox"/> S Ph.D. - Doctor of Philosophy, Georgia Institute of Technology Complete	12/02/21 06:58 PM EST	12/02/21 06:58 PM EST	Full / Campus Interview	Invite +		☆☆☆☆☆

110

Why?

The approvers are looking for this combination when you submit for approval in FSRP.

Interfolio is the source system for Faculty Search Reporting Process (FSRP).

Basic scenario combinations:

Position Status	Application Status	Disposition Codes	Why this combination
Reviewing Applications	- Longlist (mark these first with a tag or status; typically, during this stage, the committee has gone through the list and knows who they want to look at in more depth.)	<ul style="list-style-type: none">- No codes on these yet- These applicants have the potential to move on to the next step in the search process.	<p>Best to start applying applicant statuses sooner than later as the search moves through its phases.</p> <p>Communicate with the search chair, to provide you with their longlist choices or have the committee apply tags.</p>
	- Not Selected	<ul style="list-style-type: none">- Not selected: incomplete application (1)- Not selected: does not meet minimum criteria for position (2)- Not selected: less relevant qualifications and/or experience (3)- Not selected: not best match for job criteria relative to other candidate(s) (4) <p>Choose one that best fits for most.</p>	<p>All those identified as Not Selected can be Archived.</p> <p>This will make managing the list of applicants easier for you as well as the committee.</p>
Longlist / Initial Interviews	- Initial Interview	<ul style="list-style-type: none">- Not yet on these applicant.- BUT ALL OTHER applicants will have either Not Selected or Longlist status and will NEED to have a disposition code because they did not make it to this stage of the search .	<p>This shows the approvers the beginning steps the committee has taken to reach the end goal of hiring someone. It tells the story.</p>

The key combinations in Interfolio

Position Status	Application Status	Disposition Codes	Why this combination
Short List / Final Candidate(s)	- Full /Campus Interview (on those who have made it to this stage of the search)	- Not yet on theses applicant. - BUT ALL OTHERS NEED to have an applicant status and a disposition code –if not, the reviewer may send it back.	-For when you Submit for Approval in FSRP -Informs the approvers, the Short List is ready and identifies the Full/ Campus Interview applicants to be reviewed and approved.
Offer Stage	- Full /Campus Interview - Offer extended	- Not yet on all applicants.	-Informs everyone, this search has been approved and is now in the offer stage of the process.
Search Closed with Hire	- Hired - Offer Declined - Withdrew before Offer	- Offer accepted - Offer declined - Candidate withdrew from search ALL OTHERS NEED to have an applicant status and a disposition code.	If there were a roll-down, then the person that declined Yale's offer would have the status and code, Offer Declined, else one person with Hired and Offer accepted.
Search Closed without Hire	- Offer Declined - Withdrew before Offer	- Offer declined - Candidate withdrew from search ALL OTHERS NEED to have an applicant status and a disposition code.	

The combination of the statuses and codes work together to manage the search and its applicants.

Statuses and codes, when best to apply:

The combination of the statuses and codes work together to manage the search and its applicants.

- When the search is in the **Reviewing Application** stage
 - Begin applying applicant statuses (use tags to help)
 - Work with the search committee to obtain the lists of those that are contenders
- When a list has been identified who is moving to the next round
 - Use tags and / or applicant statuses to mark the applicants with a Longlist or Initial Interview status
 - Give the Not Selected applicant status to those that did not make the cut (Tip: view all applicants, select all, then de-select those with a Longlist status, mark all others with Not Selected)
- When the Not Selected status has been applied
 - Give the Disposition Code(s) to those applicants with the Not Selected status (Tip: use filter, select all, and apply a disposition code)

NOTE: All updates are done in Interfolio. It's the source system for FSRP.

Applicant Status	Files of the two document types from Interfolio pulled into FSRP
<ul style="list-style-type: none">- None yet- Not Selected	No files are pulled into FSRP if no applicant status has been applied or if the applicant status is set to “Not Selected”
<ul style="list-style-type: none">- Longlist- Initial Interview (phone/video/conferences)- Full / Campus Interview- Offer extended- Hired- Offer Declined- Withdrew before offer	<p>Files of the following types will be pulled into FSRP, if the applicant status is set to any of statuses to the left, i.e. "Longlist":</p> <ol style="list-style-type: none">1) CV2) Confidential Letters of Recommendation or Evaluations

Interfolio is the source system – feeds FSRP.

FSRP system pulls these two document types.

- C.V.
- Confidential Letters of Recommendation or Evaluations









Yale University > Positions > Assistant Professor >

Required Documents

Assistant Professor

6 Documents Required

Drag and drop the documents in the list below to change the order they will appear in the application requirements.

1	C.V.		
1	Cover Letter		
1	Research Statement A two-page summary of current and proposed research.		
3	Confidential Letter of Recommendation or Evaluation		

+ Add Requirement

Uncategorized files will not be brought into FSRP

Application			Complete	+ Add File	Read
Documents					
Title ^	Date #	Actions			
acscentsci.1c00829 Uncategorized	Sep 18, 2022	Download			
Advanced Energy Materials Panchromatic Co-Sensitizer Uncategorized	Sep 18, 2022	Download			
.CV__Sep_2022 Uncategorized	Sep 18, 2022	Download			
Cover Letter Yale Uncategorized	Sep 18, 2022	Download			
jacs.0c07651 Uncategorized	Sep 18, 2022	Download			
J Uncategorized	Sep 18, 2022	Download			
Michael Uncategorized	Sep 18, 2022	Download			
Research Statement Yale Uncategorized	Sep 18, 2022	Download			
Teaching Statement Yale Uncategorized	Sep 18, 2022	Download			

Example of an applicant that did not categorize their file types (all Uncategorized)

Enter a requirement note to help reduce uncategorized document types.

“Please categorize your documents to match the type, i.e. C.V. or Please categorize your documents to match the type, i.e. Confidential Letter of Recommendation or Evaluation.”

Yale University > Positions > Assistant Professor >

Required Documents

Assistant Professor

6 Documents Required

Drag and drop the documents in the list below to change the order they will appear in the application requirements.

1	C.V.
1	Cover Letter
1	Research Statement A two-page summary of current and proposed research.
3	Confidential Letter of Recommendation or Evaluation

+ Add Requirement

Add Document Requirement

Document Type

Confidential Letter of Recommendation or Evaluation

Number Required

3

Requirement Note

Save

Cancel

A remedy – Download and Add File

For those times when the document did not get uploaded correctly or the applicant sent them directly to you. Only need to correct for the C.V. and Confidential Letter of Recommendation or Evaluation types.

1. Download File

Remember where you saved it

Yale University > Positions > Assistant Professor - PCCSM >

Actions ▾

Education Information
M.D., Bangladesh Medical College

Status
n/a [Change](#)

Disposition Code + [Add](#)

Tags
+ [Add](#)

Application [Complete](#) [+ Add File](#) [Read](#)

Documents

Title ^	Date ↕	Actions
cover letter. jmc Cover letter	Jul 24, 2020	Download
jmc resume (1) Resume	Jul 24, 2020	Download

2. Click Add File

Add Document ✕

Upload Video Webpage

Drag & Drop your files anywhere or

[Browse To Upload](#)

+ [Add](#) [Cancel](#)

3. Browse or Drag & Drop the file

- Open searches, for this topic, is when the search position is open and searching for any rank, an Assistant, Associate Professor or Professor
- Confidential Letters of Recommendation
 - Commonly required for the assistant level applicants and these must be attached to their application in Interfolio.
- External Evaluations
 - Are for the tenured applicants and if/when they go up for review via a TAC /SAAC is when the referee letters are uploaded to the RPT Case in Interfolio.



- In Interfolio, Step 5 of 6; the two types, are member or manager.
- Your name (as the person who created the search will be listed as a manager, just the way it works.)
- The search committee will be added as members for the most part.
- For some searches, you may have been asked to add more faculty, non-search committee members, to the list so they too can view applications; that's fine
- No need to remove yourself or the other faculty from the list.



Once approved in FSRP, an email notification will be sent to you (as well as the person selected as the Dept. Chair) of the approval.

At this time, move the Interfolio position status to **Offer stage**.

This indicates that the search has been approved and is moving forward to the next phase of the search process.

Status	Opens	Closes
Offer Stage change	Oct 11, 2021	Sep 28, 2022

status

Q

Filter

Saved Views

Applicants page - view Disposition Codes

Unit

Psychiatry

Status

Accepting Applications [change](#)

Opens

Jun 6, 2019

Closes

No date set

Applicants

Search by name, education, or status

Not Selected

Save

Clear Filters

HIGHEST DEGREE EARNED:

APPLICATION STATUS:

TAGS:

PROGRESS:

RATINGS:

ARCHIVED:

2 of 2 Applicants Shown.

Applicant Name

Date Updated

Applicant Status

Disposition Codes

My Overall Rating

Santia Berberena

06/12/19 06:49 PM EDT

Not Selected

Not selected: less relevant qualifications and/or experience

☆☆☆☆

Psy.D., William James College

Filter

Saved Views

COLUMNS

Save View

Name

view with Disposition Codes

SAVE CANCEL

Select Columns to Display

Selected

☒ Date Updated

☒ Applicant Status

☒ Tags

☒ My Overall Rating

Available

☐ Complete

☐ Date of Initial Submission

☐ Highest Degree Date

☐ Disposition Codes

☐ Overall Rating

Forms

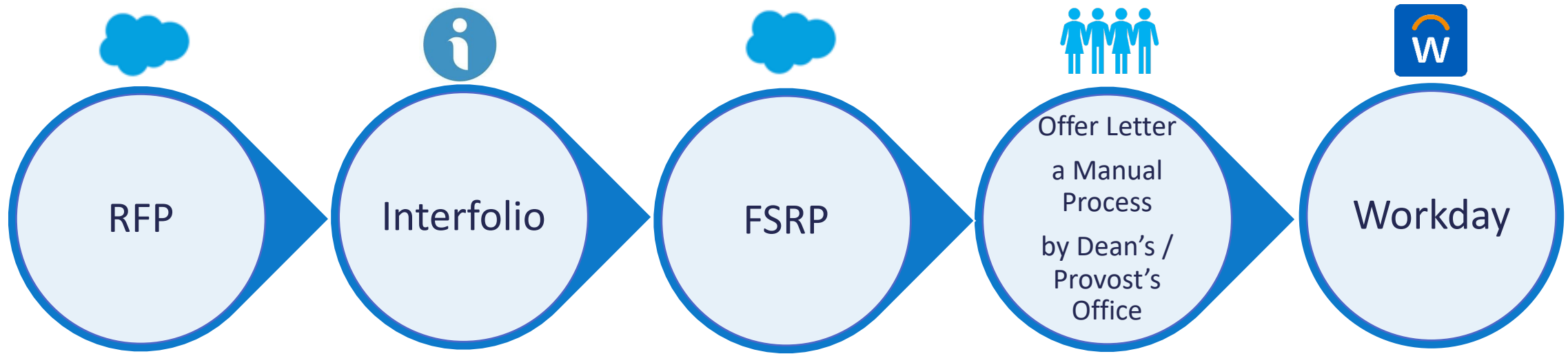
APPLY

CANCEL

RESET DEFAULTS

- ALL Applicants need to be listed in the applicant list page –
 - especially if someone was called, or interviewed at a conference, etc.
- Update Statuses:
 - on the stages of the search – Position Status
 - on applicants that have made it to the next round – Applicant Status
 - Allow the applicant status on the others to remain to show the progress of the search.
- Apply the Disposition Codes
- The most important Combo – Short List / Final Candidate(s) with Full / Campus Interview
- Identify and enter the Applicant Status: Hired or Declined Offer or if no one was selected, no changes to status.
- ALL APPLICANTS must have a status and a disposition code
- Close Position (very bottom of the list) to Archive.
- Do Not reopen old searches





Changes and benefits:

- The FSQ paper form is being replaced by a new on-line system, Faculty Search Reporting Process, FSRP.
- FSRP has been configured to automatically pull-in the required information from Interfolio.
- Keep Yale in compliance with Department of Labor, Office of Federal Contract Compliance Programs
- Offer stage is less hectic and smoother.

Anticipated Benefits:



Reporting/Compliance

Improves data quality. Ensures compliance with DOL via Interfolio's statutes and codes.



Transparency

Greater confidence in the process; all stages are known.



Productivity

Eliminates duplicate efforts.

FAS Dean's Office - **Email:** fas.dean@yale.edu; Neyza Rodriguez., Taylor Mascari, or Sarah Logan.

YSM, OAPD, Faculty Affairs Office, Email: faculty.affairs@yale.edu, Julie Buchanan, Kim Thomas, Chris Hinkley, Ingrid Tuckler-Eaton or Karen Besciglia

Office of the Provost, for the professional schools; Tracy Edwards

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