Office of Faculty Administrative Services

Monthly Information Session

February 2019
Agenda

Reminders and Updates

Workday Academic Reporting

Interfolio
- Overview of latest updates
- Application statuses, roles, and access
- Completing applications
Reminder and Update

**Academic Leaves**

- Approvals are being sent
- Enter approved leaves in Workday
  - Use the leave type approved in the memo
  - Reminder: All academic leaves *must begin on either July 1 or January 1* and *must end on either June 30 or December 31.*
- Direct any questions to faculty.admin@yale.edu
- Late requests are still being accepted
Reminder and Update

Verify that all leaves are entered

- Run Workday report, Academic - Ladder Faculty Review – Yale
## Workday Academic Reporting

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Report Name</th>
<th>Who should run</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly</td>
<td>Academic - Compensation Details – Yale</td>
<td>Business Partner</td>
</tr>
<tr>
<td>Monthly</td>
<td>Payroll Results Comparison – Yale</td>
<td>Business Partner</td>
</tr>
<tr>
<td>Monthly</td>
<td>Academic - Expiring Current Appointments – Yale</td>
<td>Appointments and Promotions Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Academic QA - Expired Current Appointments – Yale</td>
<td>Appointments and Promotions Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Academic - Degrees – Yale</td>
<td>Appointments and Promotions Specialist</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic - Ladder Faculty Review – Yale</td>
<td>Appointments and Promotions Specialist</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic - Non-Ladder Faculty Review – Yale</td>
<td>Appointments and Promotions Specialist</td>
</tr>
</tbody>
</table>
Workday Academic Reporting

Report: Academic - Compensation Details – Yale
Frequency: Monthly
Run by: Business Partner

- Good report for checking that individuals will be paid correctly.
- Can be used to check Disbursement Plan Periods (DPP) and end dates on the various plans.

Note: OFAS will be adding end dates to all faculty whose DPP’s are less than 12 months.
Workday Academic Reporting

Report: Payroll Results Comparison – Yale
Frequency: Monthly
Run by: Business Partner

❖ Good report for checking previous month against current month
❖ All unexpected changes should be investigated.
E.g.
❖ Faculty who drop off the list
❖ Significant changes in regular salary payment
Workday Academic Reporting

Report: Payroll Results Comparison – Yale
Interfolio
Introduction

Interfolio - the tool that simplifies the collection and organization of the documents specific for the faculty search as well as the review, promotion and tenure processes, and it provides secure and easy access to faculty reviewers.

• Faculty Search- this module
  • Collects all application materials for a faculty job posting.
  • Provides a means for all search committee members 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) – this module

- Organizes candidates – these are Yale faculty members that are at the stage in their careers (clocks) up for review for reappointments, promotions (internal candidates) and appointments to tenure (external candidates coming from outside of Yale)
- Collects materials, but for one individual, the candidate
- Has a workflow that allow this packet of materials, known as a case, 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).
Interfolio: today’s topics on Searches and RPT

• Applicant Status - Final Candidate(s)/Shortlist
• Roles – both Faculty Search and Review, Promotion and Tenure (RPT) modules
• SSO - Single Sign On and Partner Institution
• Applicants and their applications
• Recent Updates – RPT
• Up-coming training and implementing an approval step prior to posting positions (FAS)
Final Candidate(s)/Shortlist - Applicant Status

• Start applying this status to those individuals that are on the Faculty Search Questionnaire (FSQ)

• Using this status will help keep you in alignment with January’s memos from FAS Dean’s and the Provost’s office regarding the (FSQ); the asks not to fill in the demographic data for Short List and Proposed Selected Candidate section

<table>
<thead>
<tr>
<th>Name(s)</th>
<th>Race/Ethnicity</th>
<th>Gender</th>
<th>Country of Citizenship</th>
<th>Country of Permanent Residence</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
<td></td>
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<td></td>
</tr>
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</table>

The demographics (Race/Ethnicity, Gender, Country of Citizenship and Country of Permanent Residence) will be entered by the Provost's Office.
Quick Review - How to apply statuses

1. Click on the title of the Position – to open the search to the Applicants page
2. Click the box(es) to the left of the name(s) identified as those who are on the FSQ
3. Click the Status tab on the blue bar and select, Final Candidate(s)/Shortlist
Final candidate(s)/Shortlist status apply then send FSQ

```
<table>
<thead>
<tr>
<th>Applicant Name</th>
<th>Date Updated</th>
<th>Applicant Status</th>
<th>Tags</th>
<th>My Overall Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ph.D. - Doctor of Philosophy, University of Chicago</td>
<td>Dec 10, 2018</td>
<td>Final Candidate(s)/Shortlist</td>
<td>on of the top candidates</td>
<td>★★★★★</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Complete</td>
<td>Short List</td>
<td></td>
</tr>
<tr>
<td>Ph.D. - Doctor of Philosophy, Duke University</td>
<td>Dec 18, 2018</td>
<td>Final Candidate(s)/Shortlist</td>
<td>Short List</td>
<td>★★★★★</td>
</tr>
<tr>
<td>Ph.D. - Doctor of Philosophy, University of Pennsylvania</td>
<td>Dec 3, 2018</td>
<td>Final Candidate(s)/Shortlist</td>
<td>on of the top candidates</td>
<td>★★★★★</td>
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<td></td>
<td></td>
<td>Incomplete</td>
<td>Short List</td>
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</tr>
<tr>
<td>Ph.D. - Doctor of Philosophy, University of Notre Dame</td>
<td>Dec 3, 2018</td>
<td>Final Candidate(s)/Shortlist</td>
<td>a top junior candidate</td>
<td>★★★★★</td>
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Applicant Status list

- Status tab, on the blue bar
- Be sure to use
  - Interview
  - Final Candidate(s)/Shortlist
  - Hired
  - Offer Declined
  - Withdrew before offer
- No need to delete as the search progresses; just keep on updating
Applicant Statuses

• Start applying the Final Candidate(s)/Shortlist status

• Continue using the statuses: Hired, Withdrew before offer, Declined Offer when closing a position to archive

• Expanding the use of statuses helps with greater functionality of the system and working towards getting away from filling out forms
Questions:
Roles...
sorry not
Roles: Search and RPT

- Faculty Search
  - Administrator
  - Committee Manager
  - Evaluator(s) = Search Committee Member(s)
  - Applicant
  - Letter Writer

- Reappointment, Promotion & Tenure (RPT)
  - Administrator
  - Committee Manager
  - Committee Member
  - Candidate
  - External Evaluators
Administrator: that role is for you
Committee Manager – that’s the role for Faculty, if needed

Search side –
Give the role committee manager via User & Groups and then Add Manager at the Search Committee step when editing the position.

RPT Side –
Case Details tab, Edit committee and check the manager box on the person; do this per each review step.
Questions:
The SSO in the login URL: apply.Interfolio.com/sso

- SSO = Single Sign On

- SSO allows Yale employees to use their NetID and password to log into the system via Yale CAS
  - No need for us to create an account with Interfolio
  - Always use the Partner Institution login and this will open the Yale CAS window

- Only Yale staff and active Faculty can be granted access to the system
The SSO function

• By the end of this month, the SSO function will be enforced.
• Therefore, when adding an active faculty member to a committee be sure she/he has a Yale email address.
• If not or if the name does not appear in the list, contact, faculty.admin@yale.edu to have the individual added properly to the system.
A Yale faculty member may have two accounts with Interfolio - how can this be?

A faculty member may have ended up with multiple Interfolio accounts in a variety of ways,

• As a graduate student
• While working at another institution(s),
• Applying to various positions
• Being a letter writer
Options for faculty members with two accounts

• Option 1: They can keep the two accounts but will need remember to always log in via the Partner Institution for Yale related searches or cases prompting them to use CAS to log in.

• Option 2: These individuals can go, if they like, to the self-help pages or contact Interfolio for assistance for merging their account.
  - Contact us at help@interfolio.com or Call (877) 997-8807 9–6 Eastern Time M–F
When will you see non-Yale email addresses?

- When creating an application on behalf of an Applicant
- When creating a case for an outside Candidate – An Appointment to case.
- If this outside candidate passes the TAC, accepts offer, and is Hired, you will need to contact us via faculty.admin@yale.edu to add their Yale account to Interfolio.
Questions:
Applicants

• Must complete all three sections and submit their application; if not, their name will not be seen on the Applicant list page.

• Section are:
  • Document Requirements
  • Education Information
  • Form – EEO form

• Will receive an email notice if you create an application on their behalf.
Applicants will receive a standard email after being added

NOTE, the Sign In button.

Applicants should submit to complete their application.

This is why it’s best to give individuals the link to apply.

Administrators and Committee Managers CANNOT fill out forms (EEO or Custom) on behalf of applicants.
# Incomplete Applications – common issues

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<tr>
<td>Ph.D. - Doctor of Philosophy, University of Nebraska</td>
<td></td>
<td>Complete</td>
</tr>
<tr>
<td>Ph.D. - Doctor of Philosophy, University of Cape Town</td>
<td></td>
<td>Complete</td>
</tr>
<tr>
<td>Ph.D. - Doctor of Philosophy, Central Drug Research Institute</td>
<td></td>
<td>Complete: Pending Letters</td>
</tr>
<tr>
<td>Ph.D. - Doctor of Philosophy, University of Miami</td>
<td></td>
<td>Complete</td>
</tr>
<tr>
<td>Ph.D. - Doctor of Philosophy, Jawaharlal Nehru University, New Delhi, India</td>
<td></td>
<td>Complete</td>
</tr>
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</table>
Incomplete Applications – common issues

Longlist selected; new requirements added – docs uploaded on their behalf => mark as complete

Applicant submitted all; but waiting for reference writer’s letter; can be emailed and uploaded => will be counted in the EEO report

Added to list on their behalf; applicant never went in to complete and submit their application (missing education information under their name) => will not be counted in the EEO report unless the applicant submits
Questions:
Interfolio’s Recent Update in RPT

- More packet transparency - Changes to the visual layout of the candidate packet, so that the administrator view and the candidate view resemble each other much more closely.
  - Reminder - Any documents uploaded in the Candidate section can be seen by the candidate.
  - Do not upload committee documents in the candidate section
  - Migration Materials
• Release on January 23, 2019 in RPT
  • Reuse past case materials - introduced the ability for an Administrator or Committee Manager to pre-populate a candidate's case with suggested materials pulled from that candidate's past cases—which the candidate can accept, edit, or remove.
    • Although this new functionality is available, we are still researching to see if this is something we will be using.
Help is available:

Office of Faculty Administrative Services website.

- [https://facultyadmin.yale.edu/](https://facultyadmin.yale.edu/)

Providing assistance to applicants

- If you can easily provide help to an applicant, that’s a good thing. However, it is best to direct applicants to Interfolio for support: [http://product-help.interfolio.com/m/39937/I/606208-job-applicant-s-guide-to-interfolio-faculty-search](http://product-help.interfolio.com/m/39937/I/606208-job-applicant-s-guide-to-interfolio-faculty-search)
- Or, if they prefer, contacting Interfolio support at: help@interfolio.com; (877) 997-8807.

[Requesting the EEO report](#)
Upcoming Training

- FAS Dean’s Office - Pam Bosward and Sara O’Bryan will be scheduling training in the near future
- Provost’s Office - Tracy Edward
- FAS will be implementing the approval process step prior to posting a position opening- March/ April timeframe
Thank you and Have a Nice Day!