

FACULTY SEARCH TRAINING GUIDE FOR EVALUATOR

School of Medicine & Dentistry

Welcome to UR Faculty, our new comprehensive Faculty Information System! This training guide covers the Faculty Search module of UR Faculty, focusing on the role of an Evaluator.

Note: You must be included the FIS Faculty Search database in order to access Faculty Search. If you are an evaluator on a search committee and do not have access, please send an email to URFacultyHelp@rochester.edu and include:

- Full name
- Email address
- URID, if possible
- School/department
- Role (Administrator/Committee Manager/Evaluator)

For information on role definitions and permission levels, see Interfolio's help site: https://product-help.interfolio.com/en_US/managing-users/user-roles-in-interfolio-faculty-search

SIGN IN

- **Access Interfolio at:** https://iam-api.interfolio.com/users/sso_redirect?tenant_id=16224
- **Fill out your username and password (SSO login credentials for University of Rochester) and select the appropriate domain**
- **Click on "Sign in"**

Sign in with your username and password

Username

Password

Domain
UR Active Directory

Sign in

[Need help?](#)

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EVALUATE APPLICATIONS

VIEW LIST OF APPLICANTS

- This is your FIS home screen. On the left side menu under Faculty Search, click on “Positions”
- Click on the desired position from the list of positions displayed

The screenshot shows the FIS home screen. On the left is a navigation menu with 'Positions' highlighted and a green arrow pointing to it. The main content area features a helpdesk notice: 'Interfolio Scholar Service Helpdesk Unavailable'. Below the notice are two task counts: '0 Unread Tasks' and '0 Read Tasks'. A large empty box contains a message: 'Looks like you're all caught up. Nice.' with a laptop icon.

- The position page shows the list of applicants who have applied for the position

Assistant Professor

Position Actions ▾

Unit	Status	Opens	Closes
University of Rochester FS/LM Test Site	Reviewing Applications change	Apr 26, 2023	No date set

Applicants

Search by name, education, or status



Filter ▾

Saved Views ▾

COLUMNS

1 of 1 Applicants Shown.

<input type="checkbox"/>	Applicant Name ▾	Date Updated ▾	Applicant Status	Tags	My Overall Rating ▾
<input type="checkbox"/>	Jane Doe M.A. - Master of Arts, University of Rochester	05/01/23 01:16 PM EDT			☆☆☆☆

Complete

FILTER APPLICANT POOL

- The list of applications can be filtered by data points including highest degree earned, application status, tags, completion status, ratings, or form responses
- Click “Filter” and apply desired filters
- The filtered view can be saved by clicking “Save” or cleared by clicking “Clear Filters”

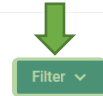
Assistant Professor

Position Actions ▾

Unit: University of Rochester FS/LM Test Site | Status: Reviewing Applications [change](#) | Opens: Apr 26, 2023 | Closes: No date set

Applicants

Search by name, education, or status



Saved Views ▾

COLUMNS

M.A. - Master of Arts Save Clear Filters



HIGHEST DEGREE EARNED: M.A. - Master of Arts

APPLICATION STATUS: No choices available.

TAGS: No choices available.

PROGRESS: Complete

RATINGS: My Rating

☆☆☆☆ No Rating

ARCHIVED: Yes No

[Filter by Form Responses](#)

READ APPLICATIONS USING THE DOCUMENT READER

- Select the checkbox next to the desired applicant(s) name.
- A red horizontal menu bar will appear. Click on “Read”. This will open the document reader.

Assistant Professor

Position Actions ▾

Unit: University of Rochester FS/LM Test Site | Status: Reviewing Applications [change](#) | Opens: Apr 26, 2023 | Closes: No date set

Applicants

Search by name, education, or status



Filter ▾

Saved Views ▾

COLUMNS

1 of 1 Applicants Shown.

[READ](#) [EMAIL](#) [STATUS](#) ▾ [TAG](#) ▾ [+ DISPOSITION CODE](#) [↓ DOWNLOAD](#) [ARCHIVE](#)

Applicant Name ▾	Date Updated ▾	Applicant Status	Tags	My Overall Rating ▾
<input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester	05/01/23 01:16 PM EDT		+	☆☆☆☆

ADD ANNOTATIONS

- Notes can be left on materials by an evaluator visible to only that evaluator.
- On the lower right corner of the document reader:
 - Click the pencil with square icon to add annotations
 - “Point” adds a note with an arrow pointing to a specific point in the document
 - “Area” adds a note to a selected area
 - “Text” adds a note to highlighted text
 - Click into a note and click the trash can icon to delete that note
 - Click the eye icon to toggle the annotations on or off

The screenshot displays a document reader interface with a document page on the left and a control panel on the right. The document page contains several paragraphs of placeholder text. A red dashed box highlights a paragraph, and a red arrow points from a note box to a specific point in the text. The control panel at the bottom right includes a green arrow pointing down, a toolbar with icons for Point, Area, and Text, and a status bar with icons for adding, deleting, and toggling annotations. The top of the interface features navigation links for Comments, Tags, Ratings, and Download, along with a search bar.

Comments Tags Ratings Download Search PDF Search

More information needed

Good research experience

Point Area Text

Previous Material < 1 / 1 > Next Material

EXPORT ANNOTATIONS

- Select the “Annotations” tab on the left side of the document reader
- Click on the arrow with square icon to export annotations

Jane Doe

Applicant Profile

Comments Tags Ratings Download Search PDF Search

Application Annotations

Search

Cover Letter	May 9, 2023 at 4:24 PM
More information needed	
Cover Letter	May 9, 2023 at 4:25 PM
Good research experience	

More information needed

Good research experience

Point Area Text

Previous Material < 1 / 1 > Next Material

USE TAGS TO MARK & SORT APPLICATIONS

- Tags are used to help sort, categorize, and quickly identify applications. Tags are visible to other committee members.
- On the applicant's profile under "Tags" click "+ Add" to add a tag.
- Alternatively, tags can also be added in bulk from the position page.

Jane Doe

Actions 

Education Information

M.A., University of Rochester

Status

n/a [Change](#)

Disposition Code [+ Add](#)

Tags

strong publications 

[+ Add](#)



Application

[Complete](#)

[+ Add File](#)

[Read](#)

Documents

Title ^	Date ↕	Actions
C.V. C.V.	May 1, 2023	Download
Cover Letter Uncategorized	May 9, 2023	Download
Creative Work Creative Work	May 1, 2023	Download

Forms

Title ^
University Base Application Form 20 Questions

RATE APPLICANTS

- Evaluators can rate applicants on a 5-star scale. Note: if blind review is enabled by the administrator, evaluators can only see their own rating. However, they will still be able to see the committee summary rating.
- On the applicant's profile, scroll down to "Ratings" and rate applicants on a 5-star scale.

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Internal Documents + Add File

Materials

Title	Date	Actions
No internal documents have been added.		

Ratings

My Ratings Committee Summary

Average	★★★★☆	★★★★☆
Research	★★★★☆	★★★★☆

Comments + Add Comment

No Comments have been added to this application.

Notes Add Note

You can leave notes here providing details about this application to committee members. These can include hiring notes, application notes, or offer notes.



COMMENT ON APPLICATION


- Evaluators can leave comments on applications. Note that if blind review is enabled by the administrator, evaluators can only see their own comment.
- On the applicant's profile, scroll down to "Comments" and enter a comment.


Internal Documents [Add File](#)

Materials

Title ^	Date	Actions
No internal documents have been added.		

Ratings

	My Ratings	Committee Summary
Average	★★★★☆	★★★★☆
Research	★★★★☆ 	★★★★☆

Comments  [Add Comment](#)

No Comments have been added to this application.

Notes [Add Note](#)

You can leave notes here providing details about this application to committee members. These can include hiring notes, application notes, or offer notes.

DOWNLOAD OR SHARE APPLICATIONS

- Evaluators can download or share applications with other colleagues
- From the applicant profile page, click on “Actions” on the top right corner and select either “Share Application” or “Download Application” (can be downloaded as a PDF or ZIP)

Jane Doe

Education Information

M.A., University of Rochester

Status

n/a [Change](#)

Disposition Code [+](#) [Add](#)

Tags

[strong publications](#) [+](#) [Add](#)

[v](#) Application

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

Actions [v](#)

- Share application
- Email applicant
- Download Application PDF
- Download Application ZIP
- Mark application incomplete
- Request recommendation
- Send to Appointment Management (a...

Documents

Title ^	Date v	Actions
C.V. C.V.	May 1, 2023	Download
Cover Letter Uncategorized	May 9, 2023	Download
Creative Work Creative Work	May 1, 2023	Download

Forms

Title ^
University Base Application Form 20 Questions

For more information, see the Evaluator’s Guide to Faculty Search on Interfolio’s help site: https://product-help.interfolio.com/en_US/evaluating-applications/evaluators-guide-to-faculty-search

Click here for an in-depth training course on Faculty Search for Evaluators:

<https://rise.articulate.com/share/Qzgz1OtdKYJIOC9S-wghHTWVmzPS8yGZ#/>