

## **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](mailto: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](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](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 UR Faculty home screen. On the left side menu under Faculty Search, click on “Positions”
- Click on the desired position from the list of positions displayed

Home

Faculty Search

Positions

Templates

Administration

Reports

Users & Groups

Interfolio Scholar Service Helpdesk Unavailable

Interfolio Scholar Services Helpdesk will be unavailable today, Tuesday, April 25th, from 3:30pm - 4:30pm ET. Please send us an email at [help@interfolio.com](mailto:help@interfolio.com) or leave us a voicemail at (877) 997-8807 during this time, and we will get back to you as soon as possible.

My Tasks

Unread Tasks: 0

Read Tasks: 0

Looks like you're all caught up. Nice.

- 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 <a href="#">change</a>	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"/>	<b>Jane Doe</b> 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



M.A. - Master of Arts | [Save](#) [Clear Filters](#)

[Filter ▾](#) [Saved Views ▾](#) [COLUMNS](#)

**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		<a href="#">+</a>	☆☆☆☆

## 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. At the top, there are navigation options: "Comments", "Tags", "Ratings", "Download", and a search bar labeled "Search PDF". The main content area shows a document with several paragraphs of placeholder text. A red dashed box highlights a paragraph, and a note titled "Good research experience" is attached to it. Another note titled "More information needed" is attached to a specific point in the document. A green arrow points down to a toolbar at the bottom right, which contains icons for "Point", "Area", and "Text" annotations, along with a pencil icon, a trash can icon, and an eye icon. The bottom of the interface shows navigation controls: "Previous Material", "1 / 1", and "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

The screenshot displays a document reader interface for a user named Jane Doe. On the left side, there is a navigation menu with two tabs: "Application" and "Annotations". The "Annotations" tab is currently selected, and a green arrow points to it. Below the tabs, there is a search bar and a green square icon with a white arrow pointing outwards, which is used for exporting annotations. The main area of the interface shows a document with several paragraphs of placeholder text. A red dashed box highlights a specific line of text in the third paragraph: "deserunt mollit anim id est laborum". A callout box labeled "Good research experience" is positioned to the right of this highlighted text. Another callout box labeled "More information needed" is positioned above the second paragraph. At the top right of the interface, there is a search bar and a "Search PDF" button. At the bottom of the interface, there is a navigation bar with "Previous Material" and "Next Material" buttons, and a "Point Area Text" toolbar.

## 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	<a href="#">Download</a>
Cover Letter Uncategorized	May 9, 2023	<a href="#">Download</a>
Creative Work Creative Work	May 1, 2023	<a href="#">Download</a>

#### 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.
- 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](#)


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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](#)

#### Documents

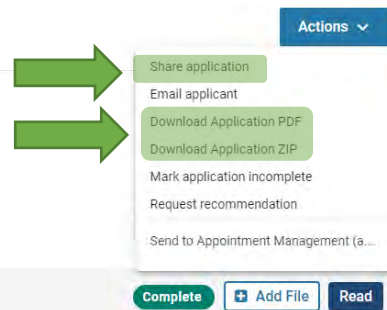
Title ^	Date ↕	Actions
C.V. C.V.	May 1, 2023	<a href="#">Download</a>
<a href="#">Cover Letter</a> Uncategorized	May 9, 2023	<a href="#">Download</a>
<a href="#">Creative Work</a> Creative Work	May 1, 2023	<a href="#">Download</a>

#### 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](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#/>