



THE UNIVERSITY OF
CHICAGO

**Academic Recruitment
and Careers System**

Academic Recruitment Search Administrator's Guide

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Introduction

Welcome to the University of Chicago's online academic search module, Academic Recruitment (AR). The Provost's Office has implemented this system to ensure consistency and compliance in the searching and screening process for all faculty and other academic appointees (OAA). This module is Software as a Service (SaaS) provided by Interfolio, which means it does not require a software download. Interfolio maintains and updates the system.

You will use the system to:

- Create and submit job postings for approval and publication online
- View and manage applicant pools for your postings

AR is not used for recruiting staff or student workers—if you are looking to post a non-academic job, please contact Human Resources or go to [Workday](#).

The policies governing the academic searching and screening process can be found at the [Office of the Provost website](#). Questions about the University's policies should be directed to Assistant Provost Phil Venticinque, pventicinque@uchicago.edu. Questions about the University's obligations as an Affirmative Action/EEO employer should be directed to the Executive Director, Office for Equal Opportunity & Access, Scott Velasquez, svelasquez@uchicago.edu.

Please note: the AR module will occasionally allow you to perform actions that are against University policy, due to its nature as SaaS with limited configuration capabilities. Those actions are noted in this guide when relevant. Users who are unsure whether a certain action is appropriate or who may have inadvertently taken an action in the module that is against policy should reach out to Phil and Scott.

Access to and use of the information housed in AR is covered by the University's [Treatment of Confidential Information policy](#) (U601), and all employees are expected to handle it in accordance with that policy.

Your Web Browser

The AR module does not require any downloads to run, and is operated through a web browser. In general, the latest versions of Google Chrome, Mozilla Firefox, Safari, and Microsoft Edge are supported, as well as versions 10 and later for Internet Explorer.

Support

Interfolio's Scholar Services support line is available Monday through Friday, 9:00am-6:00pm Eastern at (877) 997-8807 or via email at help@interfolio.com.

You can also access a full set of user help guides provided by Interfolio at [Help for Interfolio Faculty Search](#) or by clicking your name in the top right corner of the AR module and selecting "Product Help." Be aware, however, that Interfolio's guides will not have UChicago-specific recruitment information and will not reflect our institutional settings or policies.

The Provost's Office has also provided Academic Recruitment [FAQs](#) for some of the most common issues. If you do not find the answer you need through Interfolio or the FAQs, please contact your unit's academic affairs leadership.

Accessing the System

To go directly to the guide for creating a new posting, skip to page 12.

Logging In

To log in, click this link and use your CNet ID and password on the [Shibboleth login page](#).

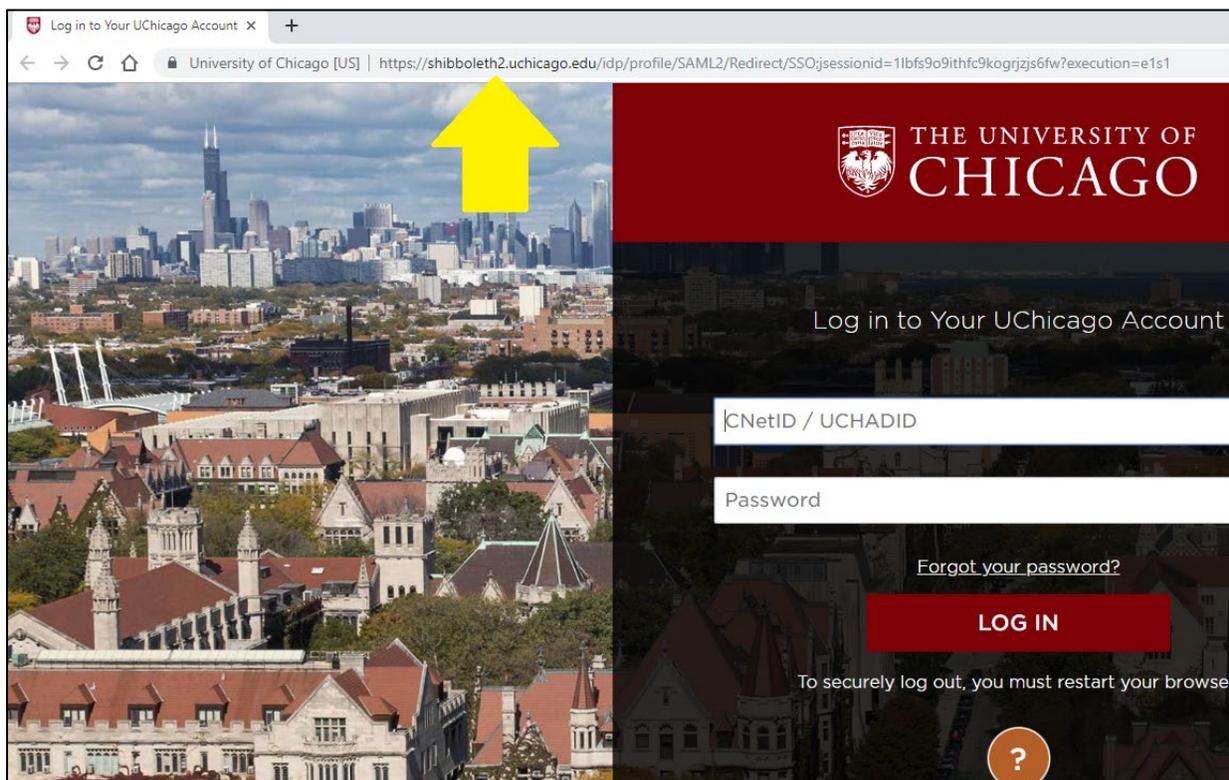
For the most part, administrative staff in the academic units and all faculty/OAAs will already be in the system. If you are unable to log in, please contact your divisional/school/institute academic affairs personnel and ask them to verify you have been added. Your CNet-associated email address must be the one on your AR user account, as you will log in through the normal Shibboleth process. If you are logged out of the system due to inactivity, you must use the institution sign-in link provided to return to your administrative dashboard.

Bookmarking the Login Page

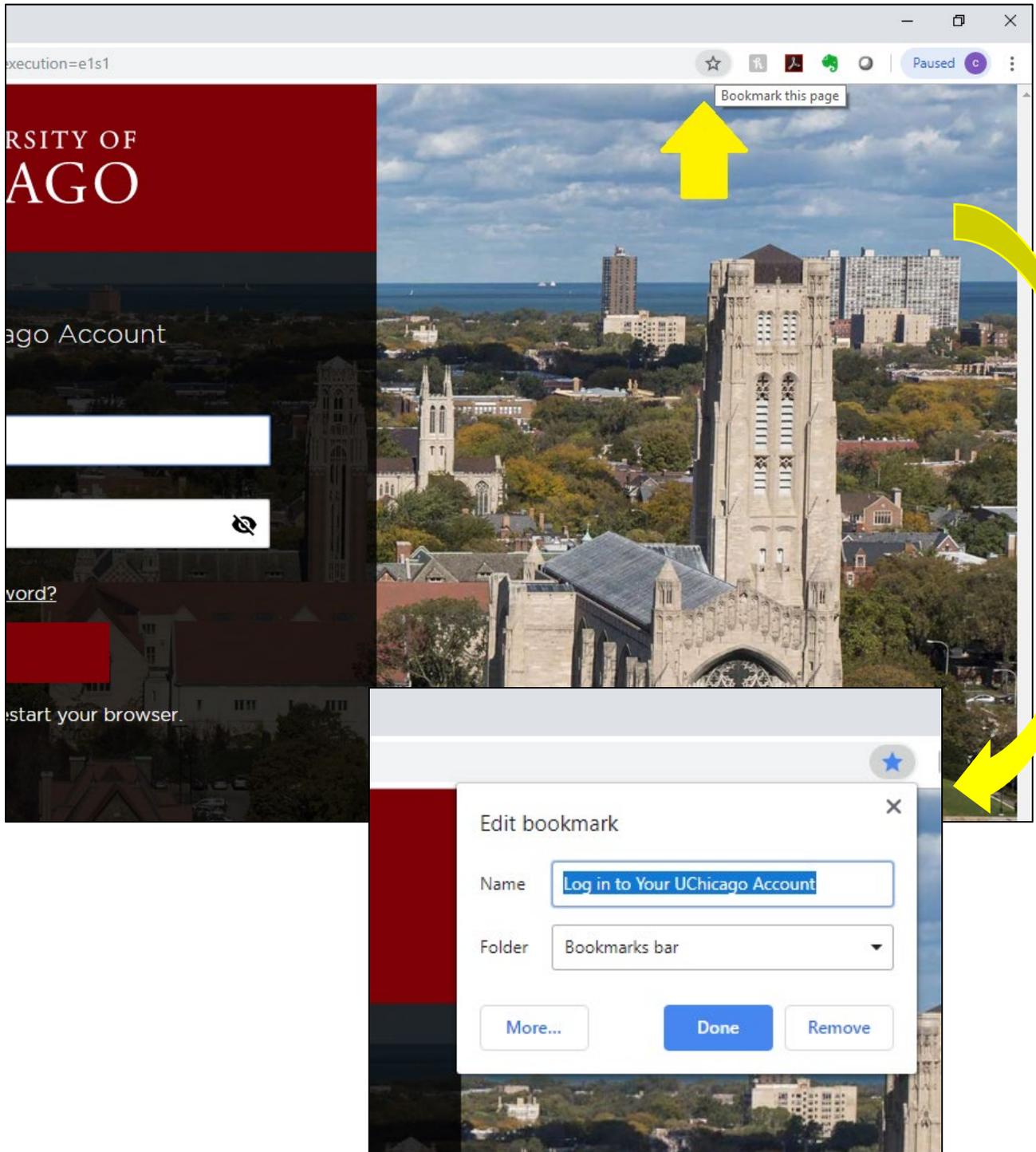
The direct link to the administrative dashboard cannot be bookmarked for repeat use due to the Shibboleth authentication feature. Follow the steps below to create a permanent bookmark. Note that the administrative dashboard is the same link and login process for each type of user (Administrator, Committee Manager, Evaluator). What will differ is the content you see when you log in.

TIP: This process is for Google Chrome. The location or naming of certain features may vary in other browsers.

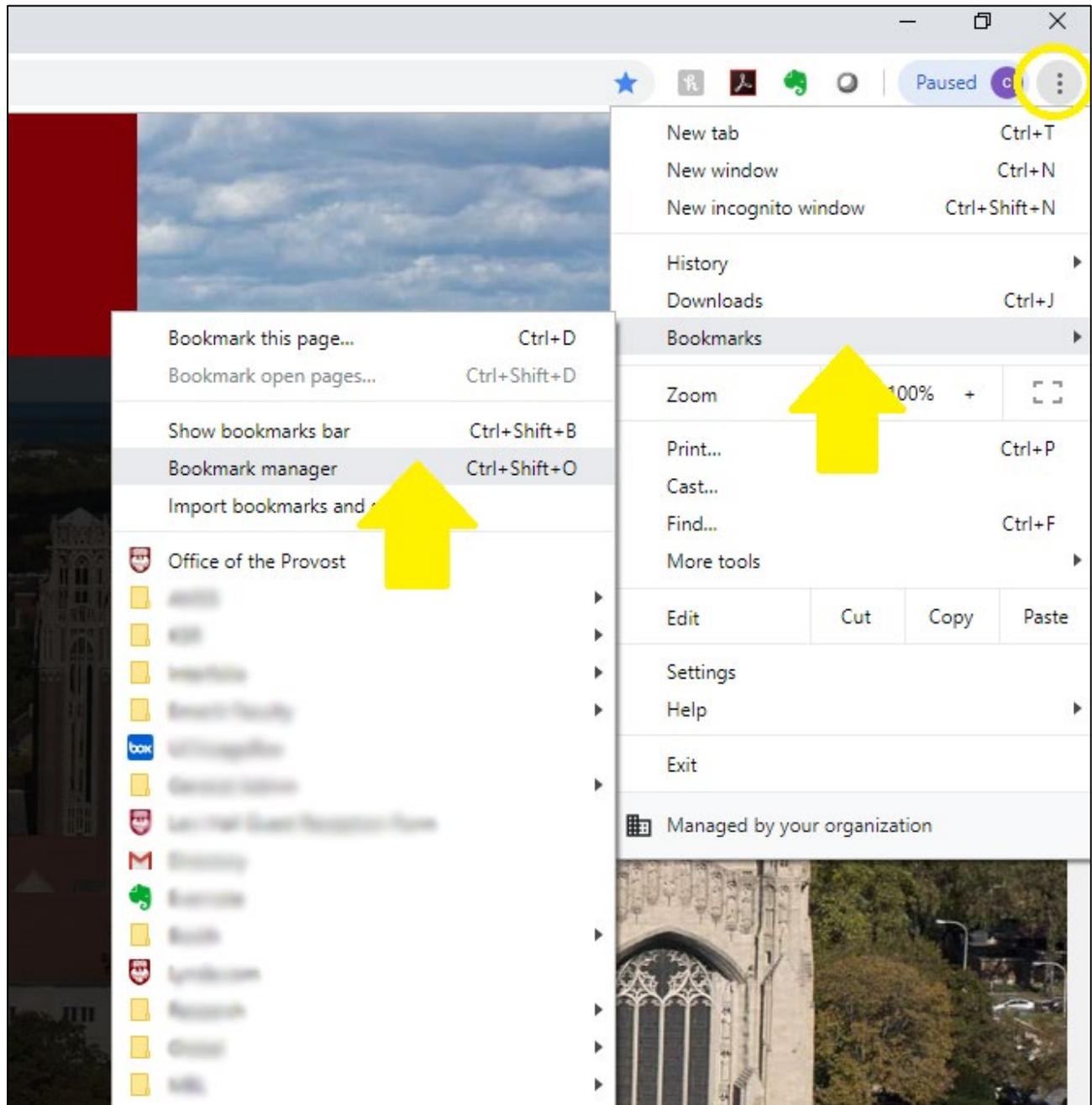
Click the link to the dashboard to open it in your default browser. The URL will automatically redirect to a different address that reflects the Shibboleth login process.



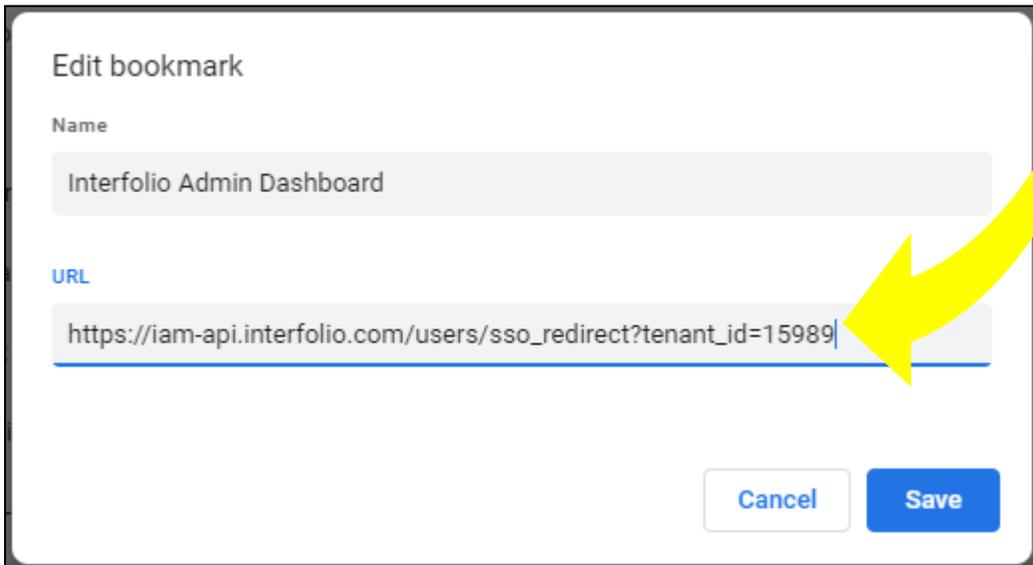
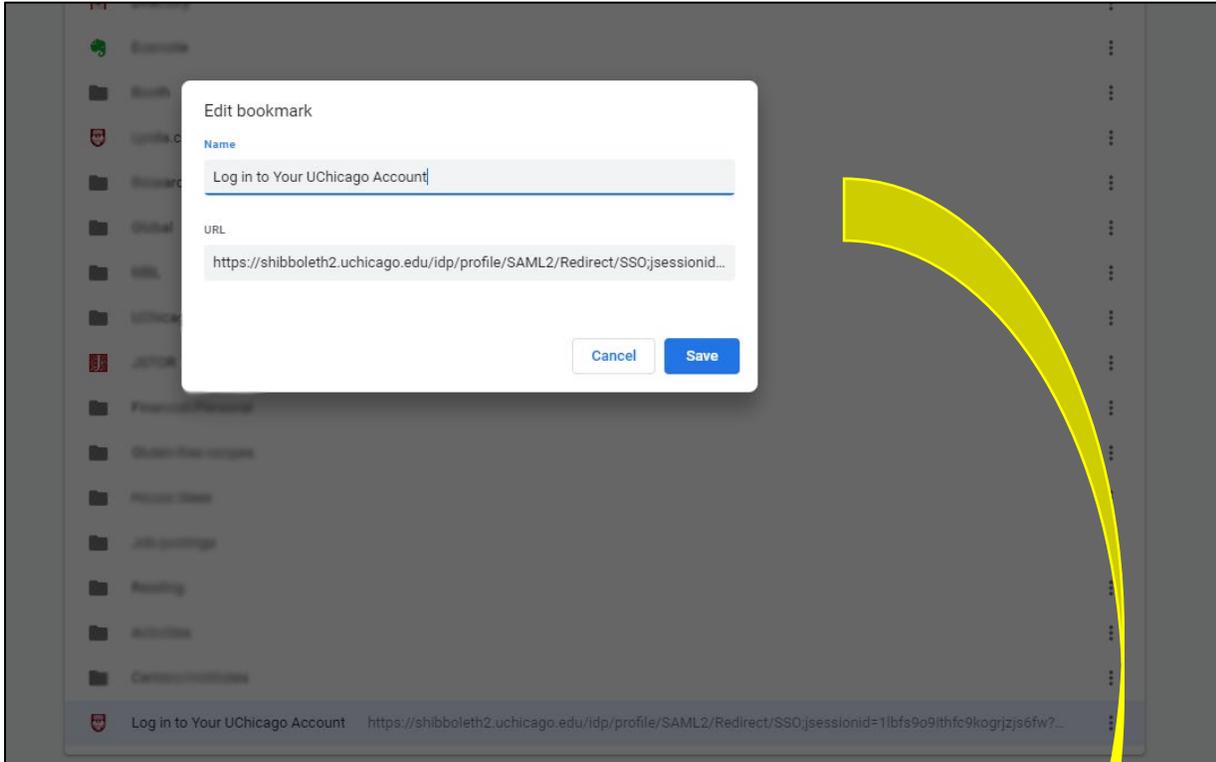
Bookmark that page using your preferred method (e.g. clicking the star icon at the right edge of the search bar). Be sure to add it in an easily-located place within your bookmarks! It will bookmark as “Login to Your UChicago Account” if you do not rename it while creating the bookmark.



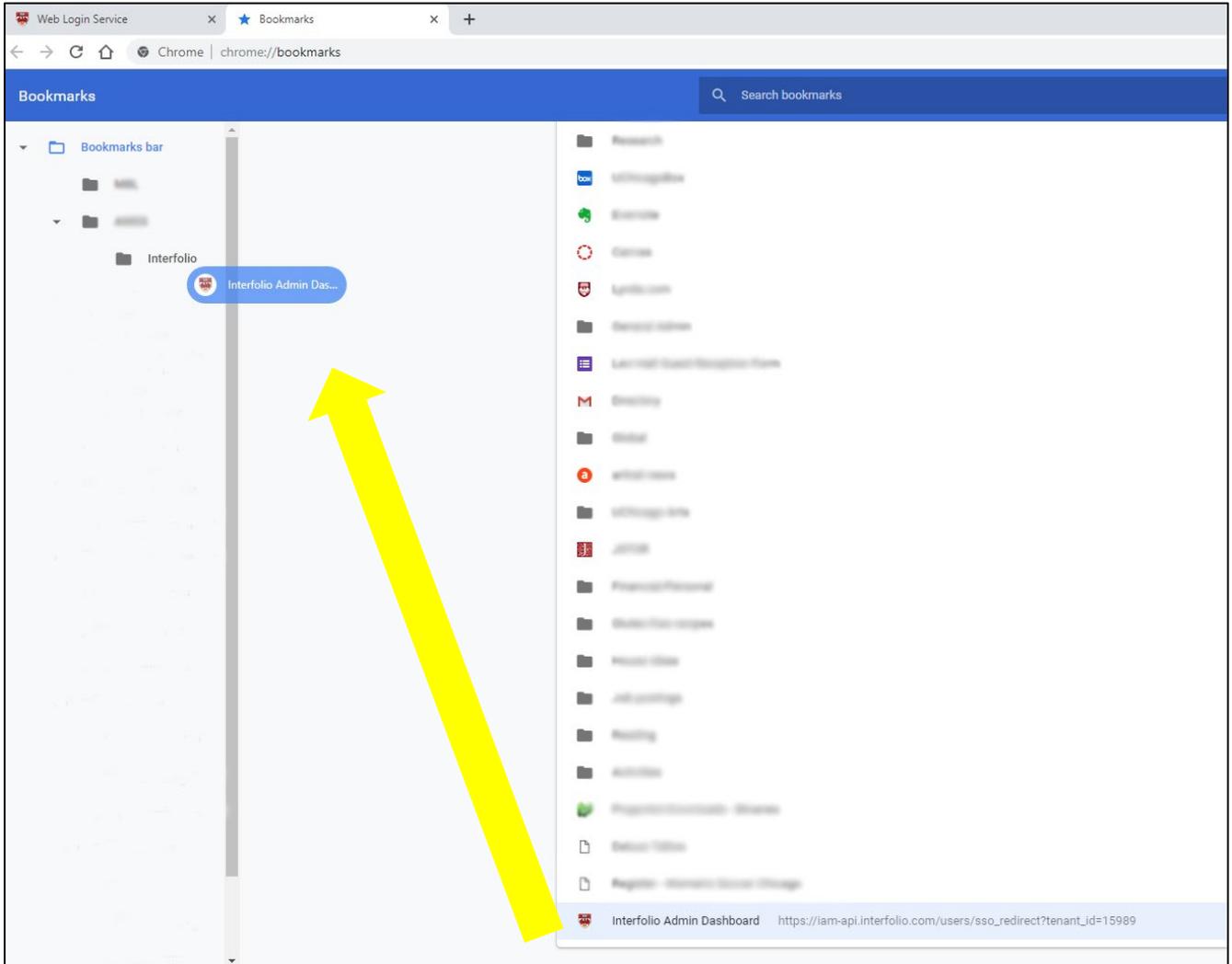
Access your Bookmark Manager in your browser. This is typically under a button for more options at the top right.



Locate the bookmark you have created and right click or select the settings for that bookmark to edit it. Replace the URL shown on the bookmark by copying and pasting the link included at the top of these instructions (and in the lower image on this page). If you have not renamed it yet, do so now and save the edited bookmark.



If you did not already organize the bookmark, drag and drop it somewhere in your toolbar or bookmarks list that will help you find it again quickly. If you have followed the steps above, it should now work permanently as a direct link to the login page, *if you use that bookmark to access the login page each time.*



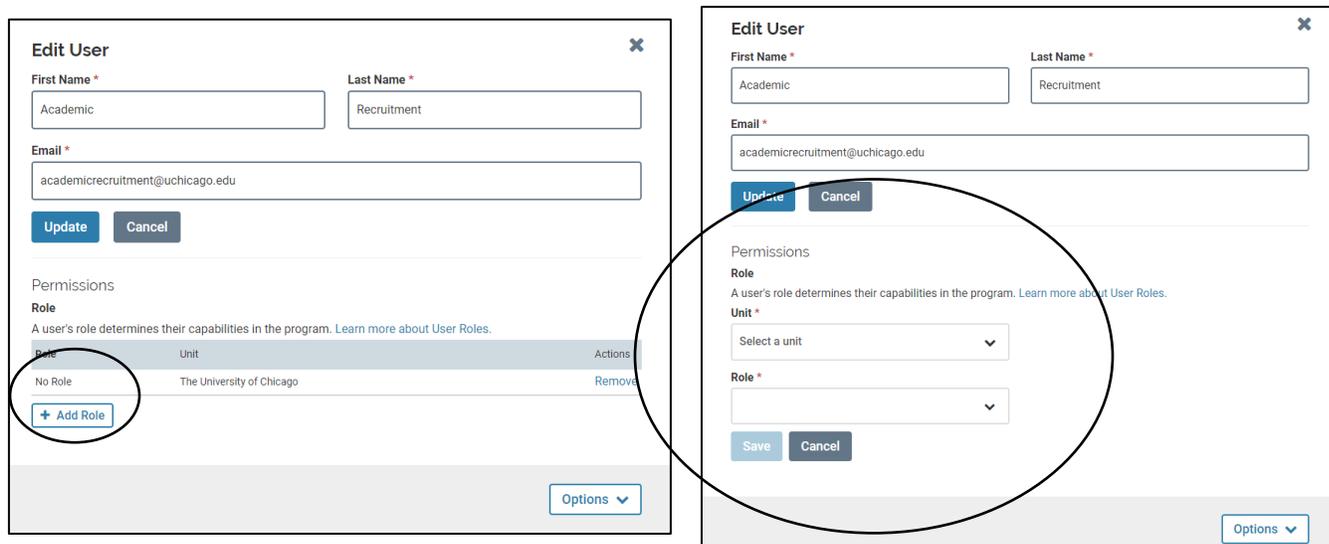
Adding New Users

To add a new user as an Administrator, log in to the AR module and select **Users & Groups** from the menu on the left side of the screen. When the screen labeled **Users, Units & Titles** appears, select the “+ Add User” button in the top right. The following popup will appear:

Type in the first name, last name, and **CNet-associated email address** for the new user. *Alternate emails will not work.* You can choose to have the system send the user a welcome message, and can add text to personalize it. Select “Preview” to see the message, which will look similar to the one below:

After a new user is added, they must be given a user role (see below) and assigned to a specific unit. Without these choices, they will be added as an Evaluator with no unit assignment by default.

To assign a role and unit, select “+Add Role” after adding the user. Options for “Unit” and “Role” will appear. The units available to you in the dropdown menu will be based on your own role in the unit hierarchy (e.g. if you are a divisional administrator, you can assign people to your division or the departments/programs within your division). The roles available are also governed by your own role – you will be able to assign users to roles that are equal to or lower than your own level of access.



More information on the user roles is below and at the Interfolio [User Roles in Interfolio's Faculty Search](#) page.

Administrator – create, manage, and monitor searches at their assigned institutional level, or at units in the hierarchy below the unit they administer. They can also control settings and permissions for the units they administer, within the bounds of University policy. Administrators are typically UChicago staff who are responsible for the academic searching and screening process.

Committee Manager – supervise specific searches. Committee Managers can edit settings and statuses (if permissions allow), view reports, communicate with applicants, and evaluate applications. This is an optional role, and some divisions may dictate how it is used for their departments or other units.

Evaluators – are assigned to one or more search committees. Evaluators can view applications, and add labels, ratings, and comments on applications. By default, all faculty and OAs are added to the system with this role.

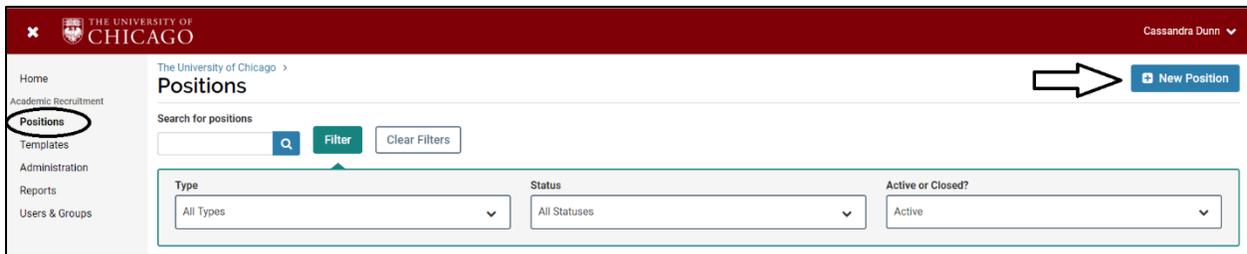
EEO Officer – This role is reserved for the Director of the Office for Affirmative Action at UChicago, as well as a strict list of additional EEO Officers they approve. Other units may not assign this role to anyone without express approval from the Director.

Depending on your access level, you may come across a fifth role called **Administrator (EEO Access)**. Do not give this role to anyone without express approval from the Director of the Office for Affirmative Action.

UChicago also has a small number of institutional administrators who can make large-scale changes to the system and provide a point of contact for feature requests. Please reach out to Phil Venticinque, Assistant Provost, pventicinque@uchicago.edu with questions like these.

Creating a New Posting

Once you log in, select the **Positions** tab from the left menu. If you have Administrator or Committee Manager access, you should see any positions to which you have access displayed in a table. To create a new position, click the “+ New Position” button in the top right corner of the window.



Setting a Position Type and Unit

A **Create Position** window will open and you will need to choose the most appropriate kind of position from the **Type** dropdown menu. If your division, school, or other unit has an approval workflow set up, choosing the Position Type will cause that workflow to trigger when you submit the position. Position Types are not public-facing, but the job board will pull in the first part of the type (e.g. “Faculty” or “OAA”) to categorize it in the filtering options.

A screenshot of the 'Create Position' form in the University of Chicago HR system. The breadcrumb trail at the top reads 'The University of Chicago > Positions >'. The title 'Create Position' is prominently displayed. Below the title, a message states: 'Please select information about the position you want to create. You cannot make changes to these fields once the position is created.' The form contains several fields: a 'Type *' dropdown menu with the placeholder text 'Select position type', a 'Search For or Select Unit' dropdown menu with the selected value 'Department of Germanic Studies', and a section titled 'What kind of position would you like to create?' with two radio button options: 'A new position' (which is selected) and 'Clone from an existing position'. At the bottom of the form are two buttons: 'Create' and 'Cancel'. A large black arrow points to the 'Type *' dropdown menu.

UChicago’s dropdown menu will show 15 Position Type categories. Because this list is institution-wide, the categories are designed to be high-level groupings rather than exact matches with all possible position types at the University. To determine the best choice for your position, consult the chart on the next page and then select the appropriate Position Type from the dropdown menu.

Please pay close attention to the Position Types chart to ensure you are using the correct one.

If Searching for:	Use this Position Type in AR:
<i>This position type is a default part of the system, but the Provost's Office expects units to select one of the other position types that is more specific. Do not use the "Faculty" position type without explicit permission from the Provost's Office.</i>	Faculty
Collegiate Assistant Professor Any type of limited-term Instructor (e.g., Postdoctoral ____ at the Rank of Instructor)	Faculty – Instructor/Collegiate Assistant Prof.
Open Rank (Faculty-SOM) Professor (Faculty-SOM) Associate Professor (Faculty-SOM) Assistant Professor (Faculty-SOM)	Faculty – School of Medicine Track
Open Rank Professor Associate Professor Assistant Professor Instructor (tenure-track)	Faculty – Tenure Track/Tenured
Clinical Associate	OAA – Clinical Associate
Clinical Instructor	OAA – Clinical Instructor
Open Rank (Clinical) Clinical Professor Clinical Associate Professor Clinical Assistant Professor Associate Clinical Professor Assistant Clinical Professor	OAA – Clinical Track Professor
Senior Lecturer Lecturer Senior Instructional Professor Senior Associate Instructional Professor Senior Assistant Instructional Professor Instructional Professor Associate Instructional Professor Assistant Instructional Professor Adjunct	OAA – Lecturer/Senior Lecturer
Professor from Practice Professor of Practice in the Arts Associate Professor of Practice in the Arts Assistant Professor of Practice in the Arts	OAA - Professor of(from) Practice

Senior Research Associate Research Associate	OAA – Research Associate
Research Professor Research Associate Professor Research Assistant Professor	OAA – Research Track Professor
Teaching Fellow	OAA - Teaching Fellow
University Librarian	OAA - University Librarian
<i>If your unit routinely searches for position types that are not on this list, email academicrecruitment@uchicago.edu. Do not use the “Other” position type.</i>	<i>Other</i>
<i>Staff are not hired through AR. Do not use the “Staff” position type.</i>	<i>Staff</i>

If you are a department-level or institute administrator and have been correctly assigned to your unit, the **Search For or Select Unit** dropdown menu will already show your unit. If you are assigned to a division or higher-level unit in the module, select the appropriate sub-unit from the menu.

Finally, you can choose to either create the new position from scratch or clone (use settings from) an existing position with the same Position Type. If you clone a position, you will have the opportunity to edit aspects of the position you wish to change from the original.

The University of Chicago > Positions >
Create Position

Please select information about the position you want to create. You cannot make changes to these fields once the position is created.

Type *

Select position type

Search For or Select Unit

Department of Germanic Studies

What kind of position would you like to create?

A new position

Clone from an existing position

Create Cancel

To move to the next step, click Create.

TIP: Once you set the Position Type and Unit and click “Create,” you will **not** be able to edit these fields. If the Position Type or Unit is incorrect, you will have to delete the position and start over.

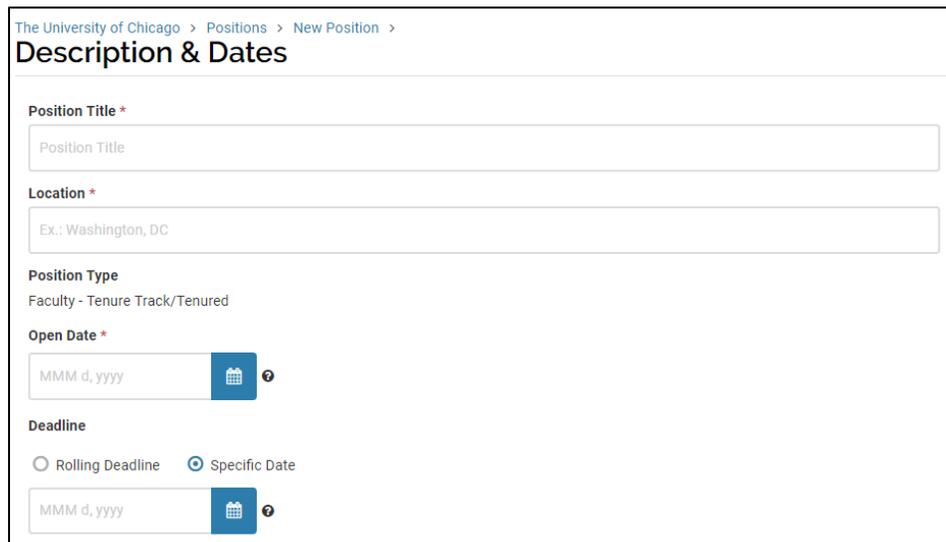
As you move through this process, AR will generate a unique URL for your job posting that applicants will use to apply. Examples of these can be seen on the job board. Note that because we have a [UChicago-specific job board](#) in addition to [Interfolio's out-of-the-box job board](#) provided to all of their clients, you may come across two URLs for your posting. Both can be used to access and apply for your position, but the one provided by Interfolio is more easily accessible to you while you are creating the posting (see page 16 for details). This URL will look like <http://apply.interfolio.com/XXXXX> and will append a random string of 5 numbers to the end. **Note that these numbers are NOT the same as the Position ID and cannot be used to search for a posting within the system.**

Adding Posting Details

After you create the posting, the AR module will lead you through a series of pages that will ask for additional details on the position and the search more generally.

Description & Dates

On this page you will provide the core information for the posting.



The screenshot shows a web form titled "Description & Dates" for "The University of Chicago > Positions > New Position". The form includes the following fields and options:

- Position Title ***: A text input field with the placeholder "Position Title".
- Location ***: A text input field with the placeholder "Ex.: Washington, DC".
- Position Type**: A dropdown menu currently showing "Faculty - Tenure Track/Tenured".
- Open Date ***: A date picker field showing "MMM d, yyyy" with a calendar icon and a help icon.
- Deadline**: Two radio button options: "Rolling Deadline" (unselected) and "Specific Date" (selected).
- Below the "Specific Date" option is another date picker field showing "MMM d, yyyy" with a calendar icon and a help icon.

Position Title – this will be the only position title applicants will see when searching/applying for postings. It is a best practice to make this as clear as possible, and to indicate if it is open rank or an annual call (e.g. Adjunct Faculty, 2019-2020). A common format for Position Titles is “title case” (e.g. Associate Professor in the Department of X).

Location – Enter the city and state where the position’s primary work will take place. Unless the role is at one of the University’s locations outside of Hyde Park, this will be “Chicago, IL.”

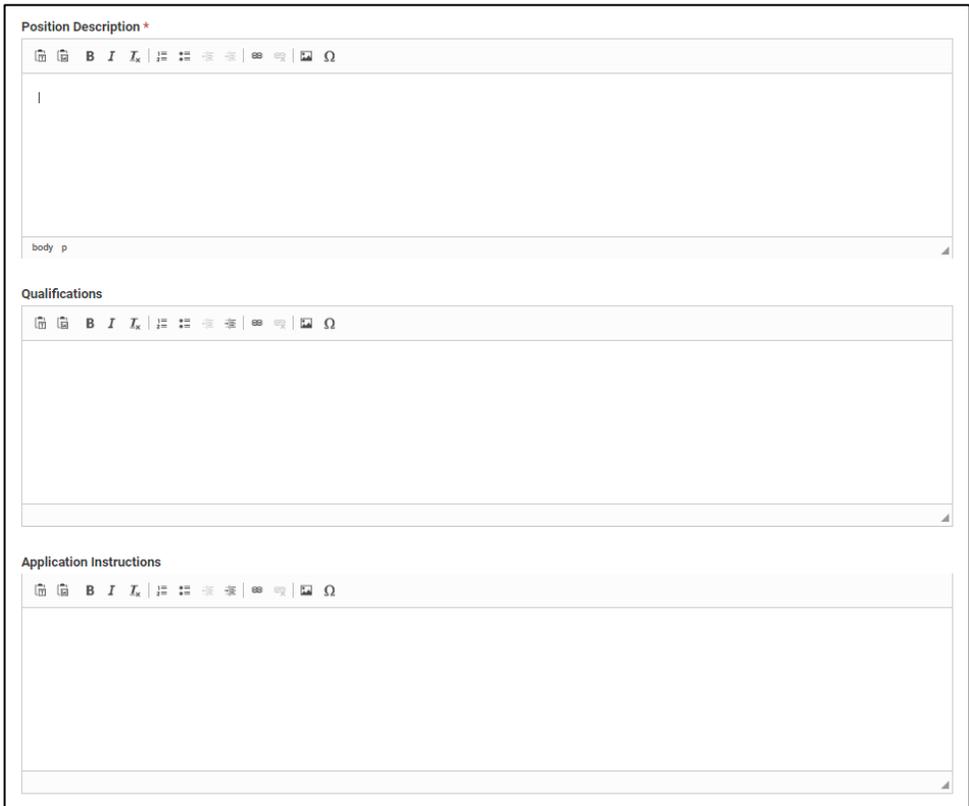
Position Type – This field is auto-populated from the selection you made on the previous screen.

Position Opens – This is the date when the position goes ‘live’ and starts accepting applications. If your unit has an approval workflow set up, the position won’t go live until it has been reviewed and approved regardless of the date provided here.

TIP: The system will automatically publish any new, approved searches at 6:30am EST daily. If a position has been created and set to open on the same day, you will need to manually publish the landing page (unless it is created/approved before 6:30am EST). Similarly, if a position is created but hasn't been approved by the date the position was set to open, it will not be automatically published.

Deadline – This is the date that you want to stop receiving applications. The system will not close your search when you reach this date, but it will remove it from the job board and new jobseekers will not be able to apply. It will also be used to remind applicants with incomplete applications 7 days and 24 hours before the deadline. If you wish to continue receiving applications until a position is filled, you can select Rolling Deadline and add a date to the Position Description in the next section that indicates when application review will begin (which must be at least 30 days from the date of posting).

In addition to the details outlined above, the public-facing posting visible to applicants is comprised of four text sections: **Position Description**, **Qualifications**, **Application Instructions**, and the **Equal Employment Opportunity Statement**.



The image shows a screenshot of a web form with three text input fields. Each field has a rich text editor toolbar above it. The first field is titled "Position Description *" and contains a single character "I". The second field is titled "Qualifications" and is empty. The third field is titled "Application Instructions" and is empty. The form is enclosed in a black border.

The **Position Description**, **Qualifications**, and **Application Instructions** fields will hold up to 6000 characters each, and can accommodate rich text formatting and text copied/pasted from Microsoft Word. At minimum, units must use the Position Description section to add the posting content (note the * indicating a required section). Using the Qualifications and Application Instructions sections will visually aid applicants in finding this information, but, if preferred, this content can all be added to the Position Description section instead.

In addition to a description of the position, your posting should include required qualifications for the position (and preferred qualifications, if any), a list of application materials required and optional,

submission deadline(s) if applicable, instructions on how to apply to the position, and who to contact within your unit if the jobseeker has questions. The position description and all ads must include a reference to the posting via the unique **Position URL**. Instructions for finding the Position URL are at the end of this section.

Regardless of which sections are used, ALL content entered on this page in the Position Description, Qualifications, and/or Application Instructions boxes must be identical to what appears in external advertisements. Units seeking an exception to this should contact Scott Velasquez, svelazquez@uchicago.edu.

TIP: The system will automatically include the related headers “Description,” “Qualifications,” and “Application Instructions” in your postings for the boxes you use. You must copy and paste all of the posting and EEO statement as shown on the job board to create external advertisements, so if character limits or per-character costs are an issue, you may want to consider putting all of your text into the Position Description field.

Equal Employment Opportunity Statement - The University of Chicago has configured AR to automatically populate this field with a current and compliant EEO Statement. This statement and heading will be appended to all job postings in AR and must be copied and inserted as-is to all external advertisements. Click “Save & Continue” to move forward.

Advertising Setting

Interfolio has made a new feature available in the module: private search postings. When creating a new job description and posting, you will now see an “Advertising Setting” section on this page that must be completed by selecting either ‘Public’ or ‘Private.’ **You should only select ‘Public’ when creating a posting.**

Advertising Setting

What is the advertising setting for this position? *

[Learn more about the advertising setting.](#)

Public, the position will available for applicants to find and apply online.

Private, the position will not be discoverable in any public position feeds managed by Interfolio.

Reason for Private Search *

Select a reason ▼

Explain the reason for waiving the mandatory search process:

Setting a position as private means it will not be publicly available on our academic job board and any that draw from our board (like HERC), nor will it appear when someone searches the interfolio database. In doing so, configuring a search as private may impact our compliance obligations.

TIP: The Posting URL can be accessed immediately after the Description & Dates page is complete and saved. To find it and insert it into your description:

- Select the blue link with the name of your position at the top of the page to quickly navigate back to the main position page:
[The University of Chicago](#) > [Positions](#) > [User Guide Example Position](#) >
- Once there, click the “Position Actions” dropdown menu in the top right and click “View position details.”
- A popup will open that will show the “Position URL.” It should now be populated with the unique numbers associated with that posting.
Position URL
apply.interfolio.com/67367
- Copy that link and close the popup.
- Click “Edit Position.”
- Click “Edit” next to the “Description & Dates” heading, and you can paste that URL into the position description and click “Save & Continue” at the bottom to resume posting creation.

Required Documents

Documents required for each position should be added to this section to ensure that applicants must upload them before submitting.

Details about required documentation can be found on the Office of the Provost website for both [University Faculty](#) searches and [Instructional Professors and Track A Lecturers](#) searches.

Per [University policy](#), “job seekers should not be asked to submit a diversity statement; where applicable, a candidate’s experience in teaching diverse students can be addressed in their teaching statement, and job postings may give guidance on doing so and should include a link to the University’s Diversity Statement ([Diversity Statement](#)) if so.”

To add a requirement, click “+Add Requirement” and select the **Document Type** from the dropdown menu. Set the **Number Required** according to what you specified in the position description, add an explanatory **Requirement Note** for applicants, if necessary, and click Save. All applicants must be required to provide their CV.

The screenshot shows a section titled "4 Documents Required" with the instruction "Drag and drop the documents in the list below to change the order they will appear in the application requirements." Below this is a list of requirements. The first is "Confidential Letter of Recommendation or Evaluation" with a count of "3". The second is "Writing Sample" with a count of "0" and a pencil icon. An arrow points from the "0" to a text input field containing "Recommended but not required". To the right of the input field are "Save" and "Cancel" buttons. A downward arrow icon is also visible in the top right of the list area.

To add a recommended document that is an “optional requirement,” first add it as above. When you click Save and return to the Required Documents page, click the pencil icon next to your requirement, edit the number to 0, and click Save. This will create a discrete place for applicants to upload a recommended or optional document you specified in the position description, but will not prevent them from submitting their application if they choose not to. It is also recommended that you add explicit instructions in the Requirement Note box, which the applicant will see when they log in to the application.

The screenshot shows a modal form titled "Add Document Requirement" with a close button (X) in the top right. It contains three main sections: "Document Type" with a dropdown menu showing "Confidential Letter of Recommendation or Evaluation"; "Number Required" with a dropdown menu showing "3"; and "Requirement Note" with a large text input area. At the bottom of the form are "Save" and "Cancel" buttons.

Collecting Confidential Letters of Recommendation or Reference Contact Information

Confidential letters of recommendation and reference contact information are two unique document requirements that can be accomplished in one of several ways outlined below. Regardless of the way you choose for your position, two key conditions must be observed:

- 1) The requirements listed in your position description must match the requirements set up in the module.

2) if you have indicated that something is a requirement for your position, applicants must meet that requirement in order to progress to the next stage of the search.

If you are looking to set up a search with letter/contact information requirements that differ from what is listed here, please contact the Provost's Office first. Some workarounds are not considered appropriate for searches and may lead to issues with applicants, search committees, or appointment approval.

Option 1: Collect confidential letters from all applicants upfront

Though it is not a best practice to request confidential letters of recommendation from all applicants upfront, it is sometimes necessary to do so depending on the rank of your search or other factors.

Position description

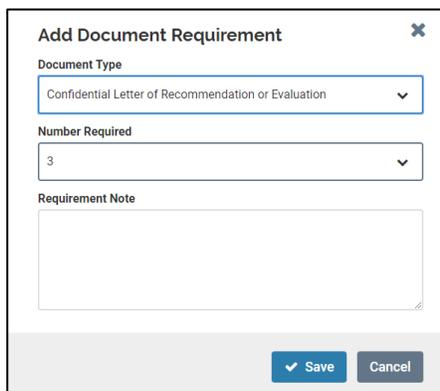
There are two ways to approach the position description if you want to ask for letters upfront.

1) If you want to receive all letters before applications can be reviewed, the description should say something to the effect of "Applicants must submit X, Y, Z, and three confidential letters of recommendation." This means that you cannot consider people true applicants if they did *not* receive three letters. If you want letters to have a hard deadline, that should also be indicated here (e.g. "Letters must be received by XXXX").

2) If you want applicants to request letters, but you want to start reviewing applications after the 30-day waiting period whether or not all of their letters have arrived, the description should instead say something like "Applicants must submit X, Y, Z, and must request three confidential letters through Interfolio." This means that the act of requesting the letters will fulfill the minimum requirement.

Module setup

In either case outlined above, the document requirement in the system is the same. When you are adding document requirements in the module, add "Confidential Letter of Recommendation or Evaluation" as a requirement and set the number required.



The screenshot shows a modal window titled "Add Document Requirement" with a close button in the top right corner. The window contains the following elements:

- Document Type:** A dropdown menu with the selected option "Confidential Letter of Recommendation or Evaluation".
- Number Required:** A dropdown menu with the selected value "3".
- Requirement Note:** A large, empty text area for additional information.
- Buttons:** "Save" (with a checkmark icon) and "Cancel" buttons at the bottom.

This will force applicants to add names and emails for the designated number of recommenders and submit requests before they can complete their application. Letters are uploaded directly to the AR module, and submitted applications that are waiting on letters will say “Complete: pending letters.”

Note that it may be difficult for recommenders to fulfill these requests if you do not indicate any deadline or guidance that applicants can share when they send the request. This can be placed in the Requirement Note box, which can accommodate up to 300 characters.

Option 2: Collect contact information and manually request letters at a later stage

If you are doing a senior search, or if your committee has elected not to request letters from all applicants upfront, you may want to collect reference contact information from each applicant and request the letters on their behalf later (e.g. once you reach a shortlist). **Note that if your unit or search requires soliciting letters with specific instructions to the recommender, you will need to use Option 2 to request on the applicant’s behalf.**

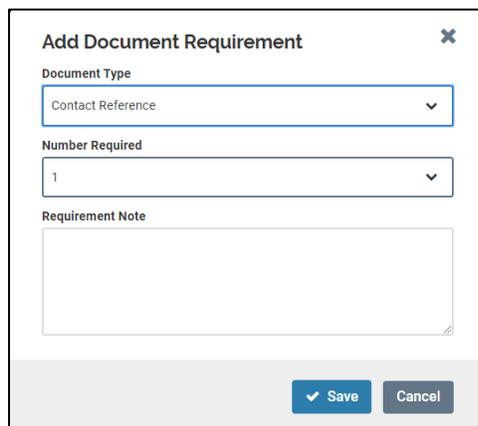
Position description

To ask for contact information, your position’s description should say something like “Applicants must submit X, Y, Z, and contact information for three references.” This means that you **ONLY** want the names and emails of their recommenders, and do not want actual recommendation letters.

Module setup

There are two ways to use the module to collect contact information for each applicant’s references. See the section on **Requesting Letters of Recommendation During Evaluation** for more information on how to use the names and emails you have collected.

1) Via the Required Documents page: Add “Contact Reference” as a document requirement and set the number required to 1. If you need contact information for multiple recommenders, indicate that in the requirement notes. To request letters at a later stage from a subset of the applicant pool, you must then manually request letters on behalf of each applicant using the contact information provided.



2) Via the Application Forms page: prior to creating a posting, an Administrator can create a custom application form to collect recommender contact information. Letters will still need to be requested manually on behalf of each applicant after downloading the form responses.

If you have the appropriate permission levels, go to your **Administration** tab on the left side of the screen and select **Application Forms** from the list that appears. Click “+Add” on the right side and give your form a title (e.g. “Reference Contact Information”). The form creator will open and you can proceed with adding questions and help text.

The screenshot shows the 'Edit Form' interface for a form titled 'Reference Contact Information'. The breadcrumb trail at the top reads 'The University of Chicago > Admin > Edit Form'. The form title is entered in a text box. Below it is a rich text editor for the 'Form Description' with the text: 'Please use this form to add the names and emails of three references who may be contacted at a later stage of the search.' A blue bar with the text 'Drag and drop questions or answers to reorder them.' is positioned below the description. There are two input fields: 'Reference #1 - Name *' and 'Reference #1 - Email *', each with a close button (x) on the right. At the bottom left, there is a checkbox labeled 'This form is required by all new positions.' and three buttons: 'Add Question' with a dropdown arrow, 'Done', and 'Show Applicant Preview'.

When you have completed and saved your form, it will be available to add to your posting on the Application Forms page. While on that page, click “+Add Form,” select the desired form from the dropdown menu, and click “Save.”

The screenshot shows a modal dialog box titled 'Add Application Form' with a close button (x) in the top right corner. Inside the dialog, there is a section labeled 'Select Form' with a dropdown menu that currently displays '— Select Form —' and a downward arrow. At the bottom of the dialog, there are two buttons: a blue 'Save' button with a checkmark icon and a dark grey 'Cancel' button.

Once you have added a form, you can click the blue “Preview” link next to it to see how the form will appear to applicants.

Please note: if your position description indicates applicants should provide *contact information for references*, it is NOT correct to use the “Confidential Letter of Recommendation or Evaluation” document requirement in the module. This is a fundamentally different requirement and will create a discrepancy between the position as described in your ads and the position as set up in the module.

Option 3: Collect confidential letters from a shortlist by doing a multi-stage search

The AR module contains functionality to support automatic letter requests at a later stage in a search without requesting information upfront or requesting letters manually on behalf of applicants.

Position description

If you intend to do a multi-stage search without requesting letters or contact information from applicants upfront, the position description does not need to indicate a related requirement.

Module setup

Do not add any document requirements related to recommendation letters or contact information when creating the initial posting. When the search committee is ready to request letters from a subset of the applicant pool, follow the process outlined in the section on **Requesting Letters of Recommendation During Evaluation**.

When you have finished adding document requirements, review the **Additional Applicant Options**. In general, it is not recommended to allow applicants to upload additional documents using that checkbox because you will be unable to indicate specific recommended documents. For that you should use the optional requirement method outlined previously. You can also choose to send a custom message to applicants on submission – if you do, it will replace the system confirmation that is automatically generated. Click “Save & Continue” to move forward.

TIP: The system can accept uploaded documents in the following formats: DOC/DOCX, XLS/XLSX, PPT/PPTX, DOT, ODT, WPD, RTF, TXT, HTML, PDF, PNG, JPEG, JPG. Files can be up to 100MB. Applicants who need to submit multimedia files can add [links to webpages and YouTube and Vimeo videos](#).

Special Case: Setting Up an Open Rank Search with Separate, Rank-Based Requirements

The AR module’s document requirements are set up to make all applicants add a file or send a request default before they are able to submit. To do an open rank search that has different requirements for applicants based on the rank to which they are applying, the **Required Documents** page must be set up in a specific way.

The following shows an example of an open rank search that requires confidential letters of recommendation upfront from applicants seeking an Assistant Professor position, and requires only reference contact information from applicants seeking an Associate or Full Professor position.

To set up an open rank search with these rank-based requirements, you must first clearly specify the different requirements in the Position Description (see the “Description & Dates” section on page 14). For example, your Application Instructions would say “All applicants must upload a CV, cover letter, and teaching statement. Applicants seeking an assistant professorship must also request 3 confidential letters of recommendation through the system, due by XXXX. Applicants seeking an associate or full

professorship must upload contact information for 3 references who may be contacted later in the search process.”

Once you have described the requirements, you will need to go to the Required Documents page and use the “optional requirement” method outlined previously. First, use the “+Add Requirement” button to add the required documents that must be submitted by all applicants.

3 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	Teaching Statement		

Add the two additional requirements for the two types of applicants.

7 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	Teaching Statement		
3	Confidential Letter of Recommendation or Evaluation		
1	Contact Reference		

Using the pencil icon at the right, edit the number required for each of the two rank-based requirements to show “0” and type clear instructions in the notes box (up to 300 characters) that match the instructions you placed in the position description. Click “Save” to add the optional requirements to your position.

3 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	Teaching Statement		
0	Confidential Letter of Recommendation or Evaluation <small>Applicants seeking an Assistant Professorship MUST submit 3 confidential letters to be considered complete. Requests must be sent through Interfolio.</small>		
0	Contact Reference <div style="border: 1px solid gray; padding: 2px; margin-top: 5px;"> <div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid gray; padding: 2px; width: 20px; text-align: center; margin-right: 5px;">0</div> <div style="flex-grow: 1;"> <p>Applicants seeking an Associate or Full Professorship MUST submit contact information for 3 references. Please upload one document with all of the information. References may be contacted at a later stage of the search.</p> </div> </div> </div>		

Save
Cancel

Setting up the requirements in this way will allow applicants to choose which rank they are seeking and fulfill the related requirements, without being forced to fulfill requirements for the other ranks. Note that the applicants who request letters will show up as “Complete pending letters” until they are received, and the applicants who do not request letters will show as “Complete” because the letters and the contact information are both optional requirements. Administrators will need to review applications that show as “Complete” to verify that the appropriate documents have been added. *It is recommended*

that you add an **Application Form** (see page 24) to your open rank searches to ask applicants which rank they are seeking – this will allow you to easily filter applicants and check their documentation.

Evaluation Settings

For all UChicago searches, units are required to define criteria by which they will evaluate applicants. It is recommended that these criteria be entered into AR to better track evaluations as they are made, but use of this feature in the module is not required by University policy (however, it may be required by your unit). For more information, refer to “Establish clear screening criteria” in the [Academic Searching and Screening Policy document](#).

You may skip this step if your search committee has not yet established its criteria, but criteria must be established either within or outside of the AR module before the search committee begins reviewing applications.

To enter evaluation criteria, click the “+Add Criterion” button. You will be prompted to enter the title of the criterion and save it. Criteria can be removed and replaced at a future point if editing is needed before review begins. Once a criterion has been given a rating by an evaluator, the criterion cannot be removed from the search and only new ones can be added.



The screenshot shows a modal dialog box titled "Add Evaluation Criterion". It features a close button (X) in the top right corner. Below the title is a label "Criterion Name" followed by a text input field containing the text "Fluency in XXX techniques used in the field". At the bottom of the dialog, there are two buttons: "Save" (with a checkmark icon) and "Cancel".

The text field allows for several dozen characters, so you can be detailed. Evaluators will be prompted to assign a rating of one to five stars for each criteria. Note that the system does not specify whether 1 or 5 is “high,” so the rule should be clearly established with the committee in advance of reviews.

By default, the box is checked to establish **Blind Review**, which means an evaluator will only be able to see ratings and comments they add to the system, and will not see what has been added by other evaluators. This helps prevent inadvertent biases from emerging in initial review. This box can be unchecked by an administrator later in the search to allow comments and ratings to be shared among a committee for discussion. Click “Save & Continue” to move forward.

Application Forms

AR allows units to create custom forms to gather additional information from applicants. Additional forms can be specific to the search, department, or division. To select from a list of forms your unit already has available, click “+Add Form,” select the desired form from the dropdown menu, and click “Save.”

Once you have added a form, you can click the blue “Preview” link next to it to see how the form will appear to applicants. UChicago has two required forms: the Application Agreement and the AA_EO Form. Both are automatically appended to your position and included in the application process for every applicant. There is no action required from the unit and these forms cannot be changed or deleted. When you are finished adding forms to your search, click “Save & Continue” to move forward.

Creating a New Form

If the form you want doesn’t already exist, you will need to create one outside of the posting creation process. To do this, select the **Administration** tab on the left side of the screen. Select **Application Forms** from the list that comes up, and then select “+ Add” on the right. You must type in a **Form Title** to begin a new form, then use the “+ Add Question” button and related dropdown menu at the bottom to build your form questions. The functionality and options are similar to Google Forms. Note that if you add text to the **Form Description** box, you must use the “Save” button that appears to retain that information. Selecting “Done” at the bottom of the form will only save the questions you have added.

To return to the position creation process after creating and saving a new form, click the **Positions** tab on the left. Locate your in-progress position and click on the blue linked Position Title. Click the “Edit Position” button and scroll down until you see the “Application Forms” header. Click the blue “Edit” link next to it and you will reenter the position creation process at the forms page and can add your new form as outlined above.

Search Committee

All faculty and OAAs have been pre-added to the AR module as users with the default Evaluator role (the lowest level of access). To add Evaluators to your search committee, click “+Add Member.” A popup box will open with a list of UChicago users and you can search by name, unit, or email to locate a specific user. Once you locate the person you are looking for, click “+Add.” Repeat this process until you have added all search committee members and click “Close.” *Note that the system does not currently recognize searches for a full first and last name, so it is recommended you search by whichever term is most unique to find your user quickly.* This step can also be skipped if the committee is not known yet.

First Name	Last Name	Email	
Valerie	Abadie	vabadie@uchicago.edu	+ Add
Dorian	Abbot	abbot@uchicago.edu	+ Add
Andrew	Abbott	aabbott@uchicago.edu	+ Add
Hiroyuki	Abe	habe@uchicago.edu	+ Add
Mark	Abe	mabe@uchicago.edu	+ Add
Daniel	Abebe	dabebe@uchicago.edu	+ Add
Herbert T.	Abelson	habelson@uchicago.edu	+ Add
Mark A.	Abney	abney@uchicago.edu	+ Add
Nabil	Abou Baker	naboubaker@uchicago.edu	+ Add
Cyril	Abrahams	cabraham@uchicago.edu	+ Add

The AR system will list you as the Committee Manager by default if you are the Administrator for that unit and you are creating the position. If you need to add a different Committee Manager to the search, click “+Add Manager.” A popup box will open and any users in your unit who have been given the Committee Manager role will appear in a list. Locate the person and click “+Add” and “Close” to return to the committee screen. **The [University’s policy](#) of a 30-day moratorium on Evaluators accessing applications means that academic users who are involved in search should NOT be given the Committee Manager role. The Provost’s Office will not be able to verify that the moratorium has been observed, and your case may be negatively impacted.**

TIP: If the Committee Manager list shows no available users, you will first need to assign the Committee Manager role to someone. See the **Adding New Users** section (page 10) in this document for information on how to do that. If the person you want to assign already has an Administrator role, you will NOT be able to assign them the CM role in addition. Committee Manager access is redundant if you already have Administrator access, so a user can only have one or the other.

Once you have added members and a manager, you will see the complete list on the committee screen.

3 Committee Members		
Cassandra Dunn	Committee Manager	X
Melina E Hale	Evaluator	X
Michael D. Hopkins	Evaluator	X

To remove a search committee member, simply click the **X** next to their record. Otherwise, click “Save & Continue” to move forward.

Internal Notes

The **Internal Notes** section is an optional AR feature that is used in different ways by different institutions. It is not specific to UChicago hiring, and may include fields that do not hold meaning for your search. This section will never be seen by applicants, but is visible to anyone with access to the search, including Administrators, Committee Managers, and the Evaluators on the search committee. *Information placed in this section (as well as in other sections during the position creation process) is discoverable, and must be in full compliance with University policies. For example, it should not include language that in any way indicates a preference for a specific person or for protected characteristics.*

The University of Chicago > Positions > TEST Assistant Professor of User Guides >

Internal Notes

Position ID or Requisition Number

Rank
e.g., Associate Professor, Lecturer

Title
e.g., Visiting Clinical Research

Discipline

Position Term Length: -- Select Term --
Anticipated Start Date: MM/DD/YYYY

Salary Range or Pay Grade
e.g., \$50,000 - \$100,000.00-0

Funding Source
e.g., Vice President's Office, Grant Foundation

Hiring Plan

General Notes

File Attachments
+ Add File

The Provost’s Office does not currently require content for this section, but may in the future if policies change. If you do not wish to enter any data on this page, click “Skip Step” to move forward.

Position ID or Requisition Number – if your unit has an internal numbering system for your searches, you can enter that here. The AR module will automatically assign a Position ID to your posting that can

be viewed from within the positions list, but it is an internal ID for use in your appointment case. It should NOT be used as a reference point for applicants in your advertisements.

Rank – rank is often included in the position title, but can be outlined more specifically here if they differ. This is also an opportunity to indicate the specific union rank if it is a union position.

Title – this title should either match what was added to the public description, or can be added after a search is concluded if the position was open rank.

Discipline – If the search is related to a specific discipline, that can be added here.

Position Term Length – a dropdown menu that shows up to 12 months; note that appointments for more than one year are not affected by this field and it should simply not be used in those cases.

Anticipated Start Date – if known, this field can be used to provide this information to the search committee.

Salary Range or Pay Grade – not typically used unless necessary for internal recordkeeping; keep in mind that any information in this section is visible to all of the search committee and others with administrative access to this search.

Funding Source – not typically used unless the position is funded by a specific grant or other alternative source.

Hiring Plan – this section can be used to list the outlets where the external advertisements will be posted.

General Notes – this section can be used for any notes related to the search that are not already covered by the sections above.

File Attachments – many units have begun using the attachment capability to retain records of advertisements that have been posted in external locations.

If you have entered information on this page, click “Save & Continue” to move forward. This page is the final step of the position creation process prior to submitting for approval.

Review Position

Once you have completed the process outlined above, one of two things will happen. If your unit has an approval workflow set up in the system, you will see the **Review Position** page and a notification that the position will need to be approved before it can open. Before clicking the “Submit for Approval” button, double-check that all of the information you have added to the position is correct, or select the appropriate “Edit” link to make changes to a specific section.

The University of Chicago > Positions > TEST position >

Review Position

 This position is in the process of being created and will need to be approved before it is open to receive applications.

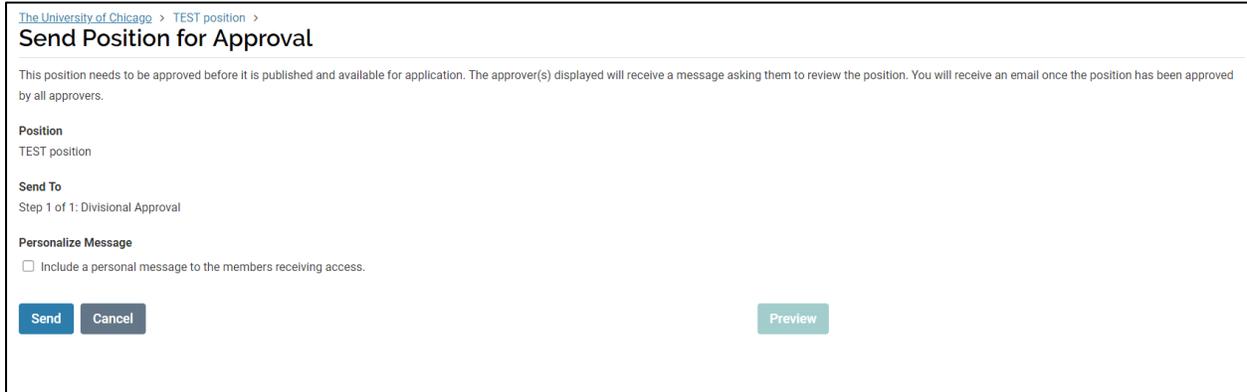
[Submit for Approval](#)

Position Information

Description & Dates [Edit](#)

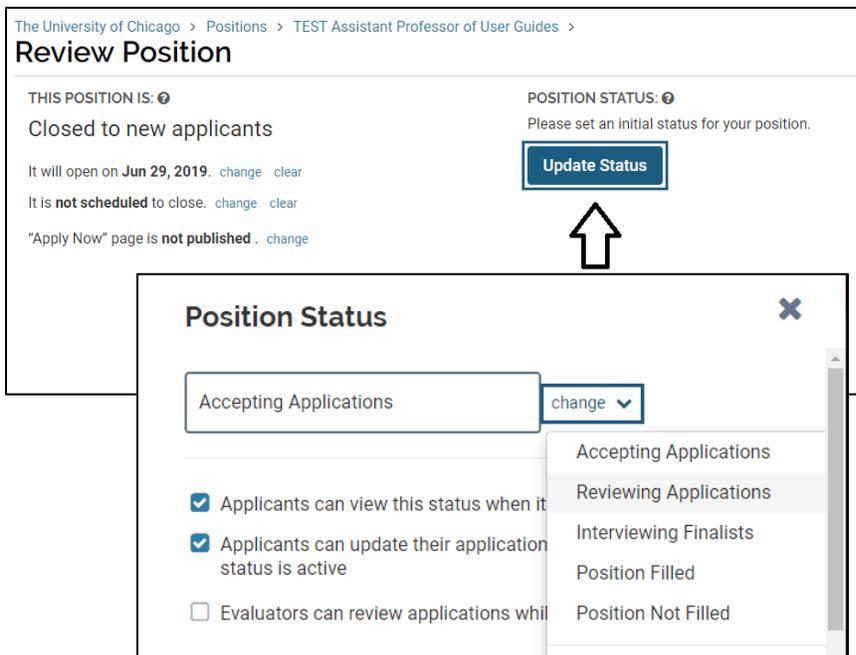
Position Title
TEST position

If your division, school, or other unit has established an approval workflow, clicking “Submit for Approval” will open an intervening page that will tell you how many steps there are in the approval workflow and where the position will be sent first. You can check the “Personalize Message” box to customize an email to the approver, or uncheck the box to send the system’s default request for approval. Click “Send” when you are finished. The system will notify you when the approvers have signed off on the position.

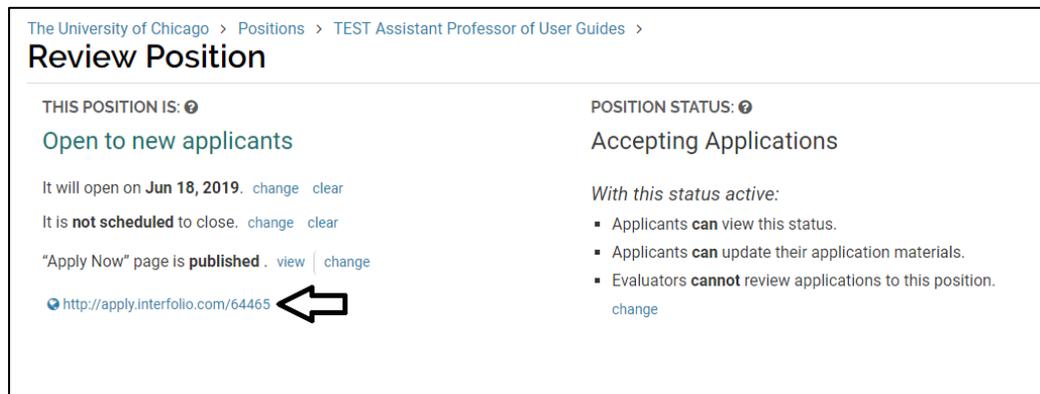


If your unit does NOT have an approval workflow set up in the system, your **Review Position** page will show the position details and a snapshot of the status. If everything looks correct, you are ready to complete the final steps to open your position. In order to begin the search, the position must be *published* to the UChicago job board and the status set to accept applications.

Click the “Update Status” button and select “Accepting Applications” from the drop down menu, then click “Save.” **The three default permissions related to this status – and other statuses used later in the search – have been set by UChicago, and must NOT be changed. Changes to these permission settings may invalidate your search because the Provost’s Office will be unable to verify that you have observed the 30-day moratorium on evaluating applications.**



The approved position will be automatically published and 'live' when you reach the position's open date entered earlier in the position creation process. If your position gets approved well in advance of the open date, you can manually publish it by selecting the "change" link next to "'Apply Now' page is not published."



The University of Chicago > Positions > TEST Assistant Professor of User Guides >
Review Position

THIS POSITION IS:  **Open to new applicants**

POSITION STATUS:  **Accepting Applications**

It will open on **Jun 18, 2019**. [change](#) [clear](#)

It is **not scheduled** to close. [change](#) [clear](#)

"Apply Now" page is **published**. [view](#) [change](#)

<http://apply.interfolio.com/64465> 

With this status active:

- Applicants **can** view this status.
- Applicants **can** update their application materials.
- Evaluators **cannot** review applications to this position.

[change](#)

When a position is published, a unique URL will appear in the bottom left corner of the window as indicated above. This will match the Position URL you likely retrieved earlier in the process.

TIP: the system will automatically publish any new, approved searches at 6:30am EST daily. If a position has been created and set to open on the same day, you will most likely need to manually publish the landing page (unless it is created/approved before 6:30am EST). Similarly, if a position is created but hasn't been approved by the date the position was set to open, it will not be automatically published and you must manually publish it as outlined above.

After you create a position and the position has passed its open date, or you have manually published it, AR generates a landing page announcing the position. The URL directs applicants to this landing page where they will start the application submission process.

Creating External Advertisements

After you have published your position using the AR module, use the Position URL to locate the posting on the job board. Copy all text on the posting, including the title, Position Description, Qualifications, Application Instructions, and the EEO Statement, and paste it into a Word document. You may need to delete extraneous images that are copied, such as a UChicago or Interfolio logo, and reformat the text to fit cleanly in the document. Unless you have received permission from the Office for Affirmative Action to create advertisements that differ from your published posting in the AR module, you must include all of the unaltered posting text in your external advertisements. Please be sure that your advertisers include the EEO Statement when they publish your ad.

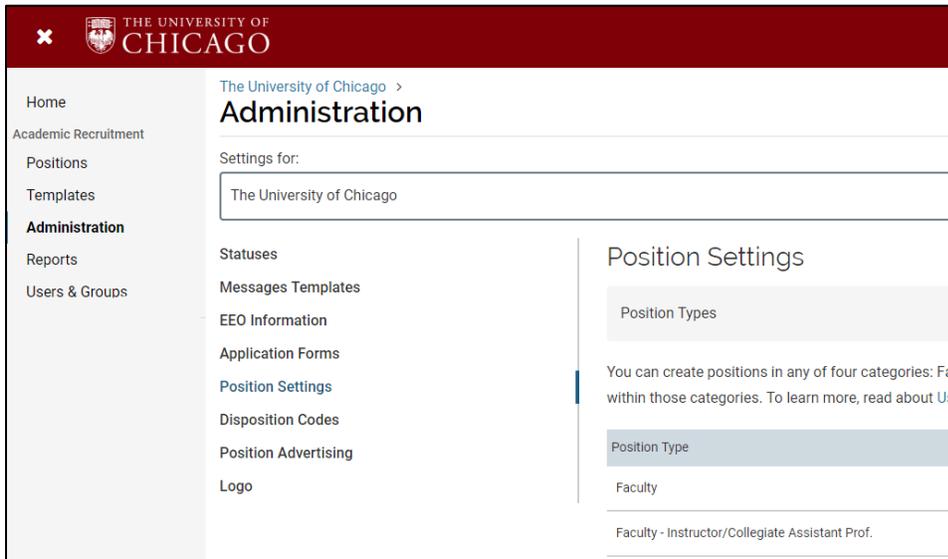
When you are ready to begin reviewing applications, proceed to the section on Managing a Search.

Special Note: Editing Positions After Approval & Setting Up Position Change Emails

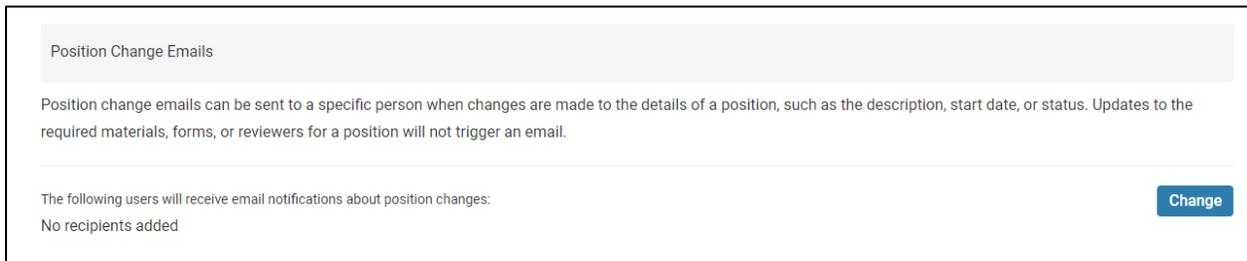
The AR module functionally allows Administrators to make edits to a position after it has been through the approval workflow in the system without requiring re-approval. Use of this feature without the designated approver's explicit approval of a change is against University policy.

All changes to position details are logged by the system, but Administrators with reporting units who wish to be proactively notified when the details of a position have been edited are able to set up **Position Change Emails** through the following method. *Note that these instructions show the perspective of an institutional administrator, so your view may be slightly different. Regardless, if you have an Administrator role you should be able to access the Position Change Email settings for your unit.*

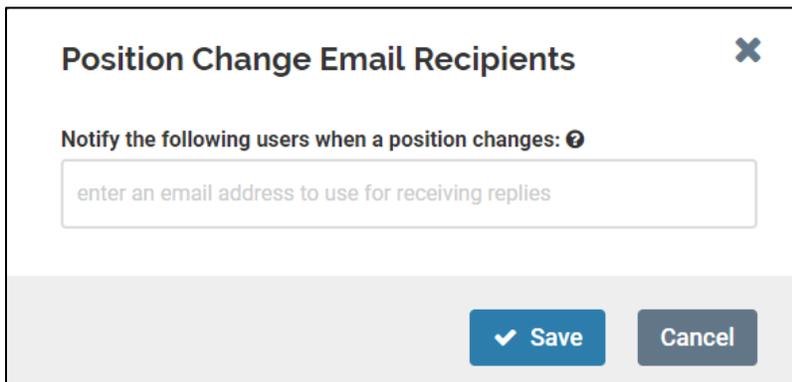
To set up **Position Change Emails**, log in to the administrative dashboard and select the **Administration** tab at the left. Choose **Position Settings** from the list that appears.



Scroll down until you see the **Position Change Emails** section.



Click "Change" and a popup box with a text field will appear.



Add the email or emails of the people who should be notified of a change and click “Save”. Separate multiple emails with commas. The popup box will close and you should now see the emails you added in the Position Change Emails section. It may take a moment to save.

Position Change Emails

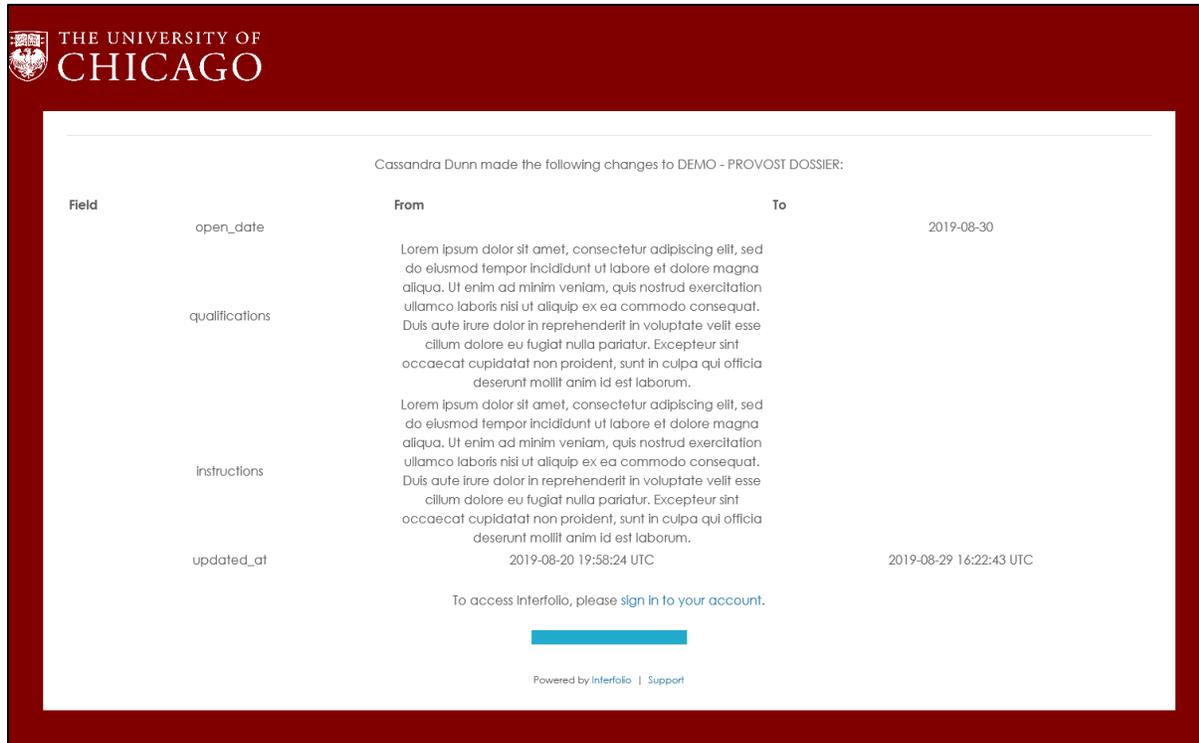
Position change emails can be sent to a specific person when changes are made to the details of a position, such as the description, start date, or status. Updates to the required materials, forms, or reviewers for a position will not trigger an email.

The following users will receive email notifications about position changes:

cdunn@uchicago.edu, academicrecruitment@uchicago.edu

The next time a change is made to the details of a position—including description, start date, or status—in your unit and the units nested within yours in the unit hierarchy (e.g. your departments if you are a division), the people you identified will receive an email. The exception is that if a person on this list is the one making a change, they will not be notified separately.

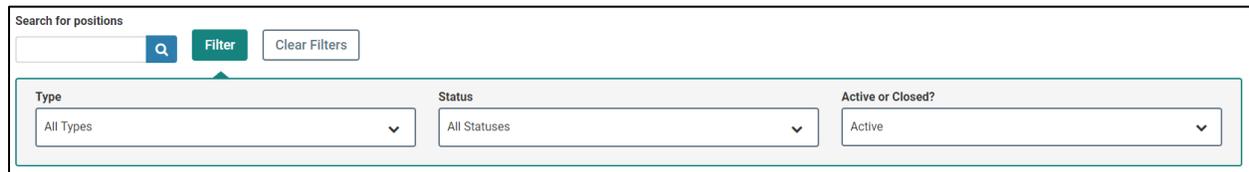
A sample notification email is shown below. *Note that the email screenshot was taken from within a browser window rather than in Outlook for clarity.*



Managing a Search

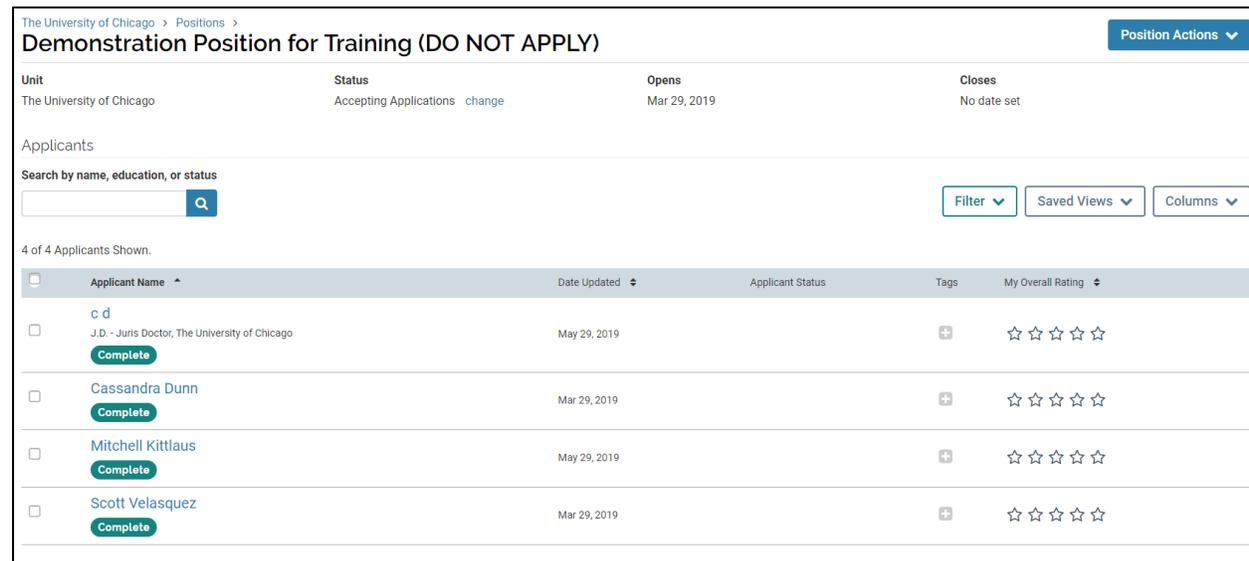
Viewing Applicants to Your Positions

To monitor the progress of a position that is accepting applications, log in to the administrative dashboard and select the **Positions** tab on the left. If you have a large list of positions, use the search bar and filter options to narrow the list by **Type**, **Status**, and whether the position is **Active or Closed**. The latter will default to “Active.” Click the blue linked title for the position you want to view.



The screenshot shows a search interface for positions. At the top, there is a search bar with a magnifying glass icon, a 'Filter' button, and a 'Clear Filters' button. Below the search bar, there are three dropdown menus: 'Type' (set to 'All Types'), 'Status' (set to 'All Statuses'), and 'Active or Closed?' (set to 'Active').

The position will open to the main position page showing the applicant list and a few details about the position, like the open and close date. The applicant list defaults to showing 25 records per page.

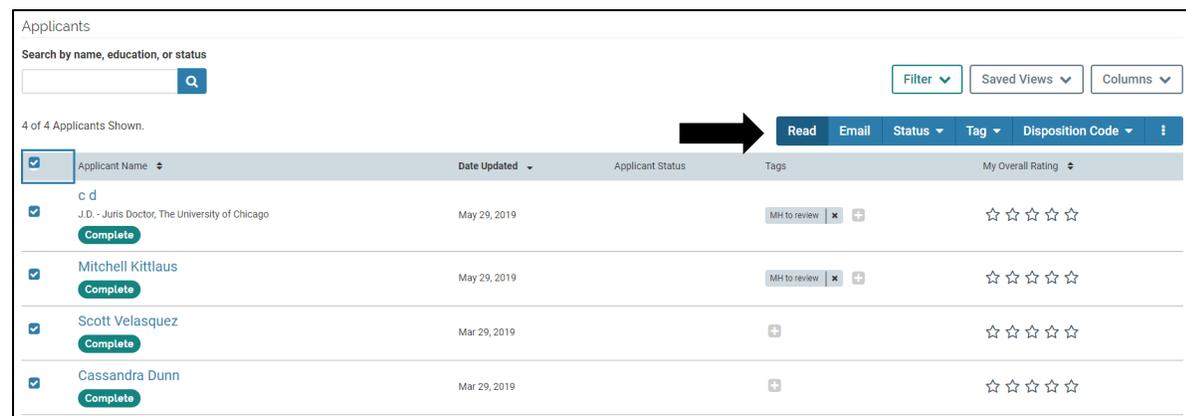


The screenshot shows the main position page for 'Demonstration Position for Training (DO NOT APPLY)'. The page includes a breadcrumb trail 'The University of Chicago > Positions >', a 'Position Actions' dropdown menu, and a 'Unit' section with details: 'The University of Chicago', 'Status: Accepting Applications change', 'Opens: Mar 29, 2019', and 'Closes: No date set'. Below this is an 'Applicants' section with a search bar and filters. A table shows 4 of 4 applicants:

<input type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/>	c d J.D. - Juris Doctor, The University of Chicago Complete	May 29, 2019		+ ☆☆☆☆☆	☆☆☆☆☆
<input type="checkbox"/>	Cassandra Dunn Complete	Mar 29, 2019		+ ☆☆☆☆☆	☆☆☆☆☆
<input type="checkbox"/>	Mitchell Kittlaus Complete	May 29, 2019		+ ☆☆☆☆☆	☆☆☆☆☆
<input type="checkbox"/>	Scott Velasquez Complete	Mar 29, 2019		+ ☆☆☆☆☆	☆☆☆☆☆

Viewing and Downloading Application Materials

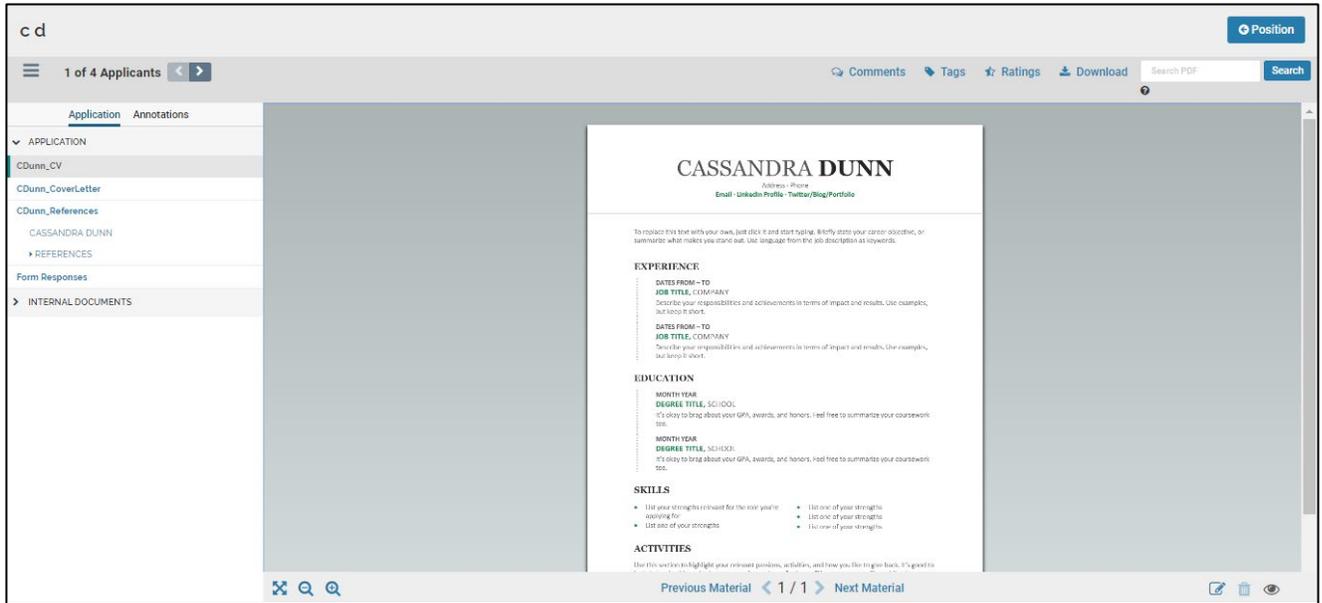
To quickly view the materials for all or a group of applicants, use the checkboxes on the left side of the applicant records to select a batch. The blue toolbar will appear when a selection is made – click “Read.”



The screenshot shows the applicant list with a selection made. A blue toolbar has appeared above the table, containing buttons for 'Read', 'Email', 'Status', 'Tag', 'Disposition Code', and a menu icon. A black arrow points to the 'Read' button. The table shows 4 of 4 applicants, with the first three selected:

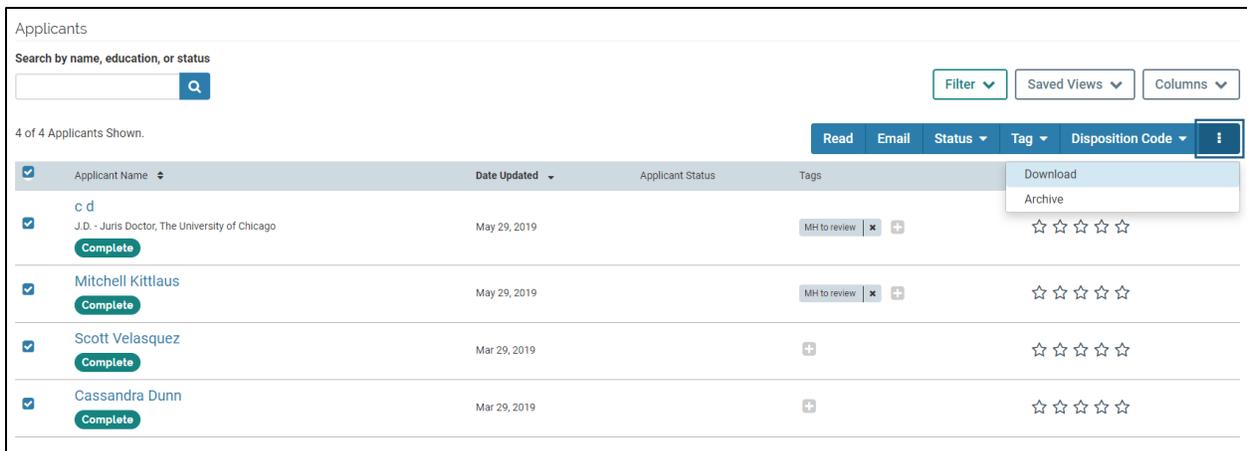
<input checked="" type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/>	c d J.D. - Juris Doctor, The University of Chicago Complete	May 29, 2019		MH to review x +	☆☆☆☆☆
<input checked="" type="checkbox"/>	Mitchell Kittlaus Complete	May 29, 2019		MH to review x +	☆☆☆☆☆
<input checked="" type="checkbox"/>	Scott Velasquez Complete	Mar 29, 2019		+ ☆☆☆☆☆	☆☆☆☆☆
<input type="checkbox"/>	Cassandra Dunn Complete	Mar 29, 2019		+ ☆☆☆☆☆	☆☆☆☆☆

This will open all of the applications you selected in the Document Viewer window. Within the Viewer, you can quickly cycle through the materials of an individual application using the controls at the bottom or the bookmarks on the left. You can also cycle through each applicant using the controls at the top left.

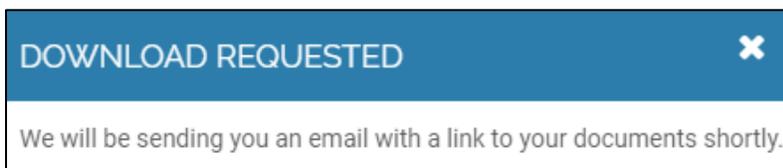


You can also use the “Download” link at the top right to download the current applicant’s materials, and use the “Position” button in the top right corner to return to the full applicant list.

To quickly download the materials for all or a group of applicants from the main position page (the one with the applicant list), use the checkboxes on the left side of the applicant records to select a batch. The blue toolbar will appear when a selection is made – click the three dots and choose “Download.”



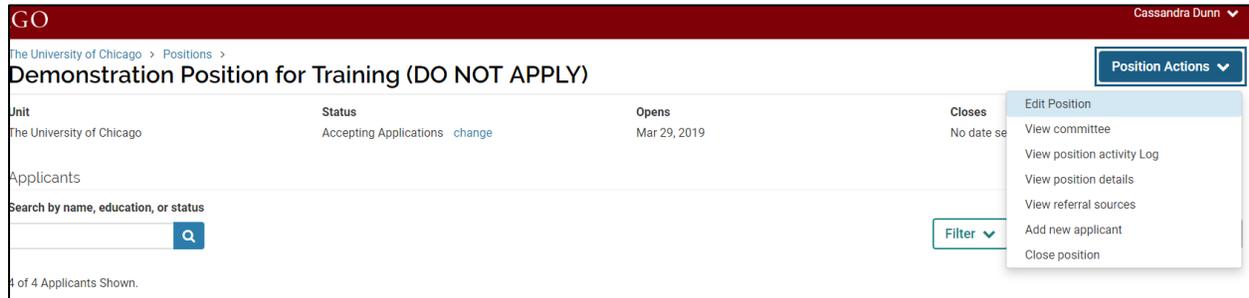
A notification that your download has been requested will appear in the bottom left of the screen.



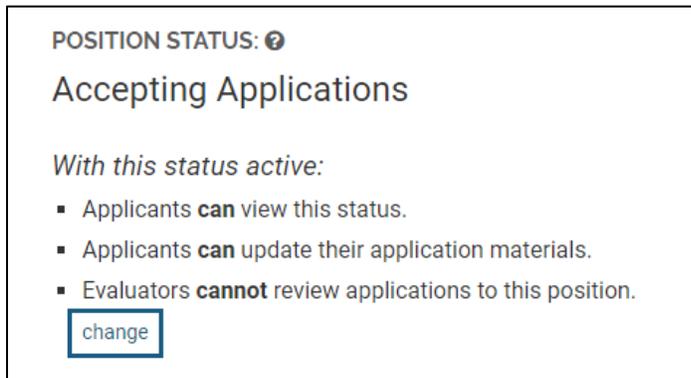
In addition to receiving an email, your document download will be available in your **Action Items** through the **Home** tab in your dashboard. It may take a minute to appear there. Applications download in a .zip file with each application collected into its own PDF.

Changing the Position Status to Give Evaluators Access

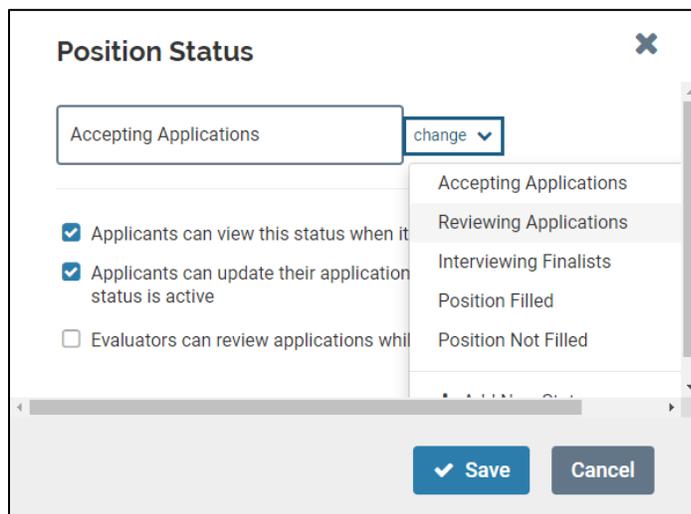
When the mandatory waiting period for your position has passed (in most cases, 30 days after it is posted), or when the waiting period has passed AND you have reached your review or close date you listed in your position, return to the position details by selecting a position from your list, clicking the “Position Actions” button in the top right, and choosing “Edit Position.”



Once on the **Review Position** screen, click the “change” link under the **Position Status** section.



A popup box will appear. Click the “change” menu, choose “Reviewing Applications,” and click Save.



The three default permissions related to this status – and other statuses used elsewhere in the search – have been set by UChicago, and should NOT be changed. Changing the status to “Reviewing Applications” will be logged in the system, and will indicate to the Provost’s Office that you have passed the mandatory waiting period and are opening the applications to the search committee.

Position Status ✕

Reviewing Applications change ▾

- Applicants can view this status when it is active.
- Applicants can update their application materials while this status is active
- Evaluators can review applications while this status is active.

✔ Save
Cancel

Sorting & Filtering Applicants

If you have a large applicant pool or are doing an open rank/open track search, you may find it helpful to filter the pool based on certain criteria established during the position creation process. To begin adding filters, select the **Filter** menu at the top of the applications list. A grey section will open and show a variety of ways the pool can be sorted: **Highest Degree Earned, Application Status, Tags, Progress, Ratings,** and whether the applicant has been **Archived**. If you added Application Forms to your search, you can also **Filter by Form Responses**. The number of filters available in these sections will be dictated by the variation in the pool and by the progress of the evaluation period for the search.

The University of Chicago > Positions > **Demonstration Position for Training (DO NOT APPLY)** Position Actions ▾

Unit The University of Chicago	Status Accepting Applications change	Opens Mar 29, 2019	Closes No date set
--	---	------------------------------	------------------------------

Applicants

Search by name, education, or status

Filter ▾
Saved Views ▾
Columns ▾

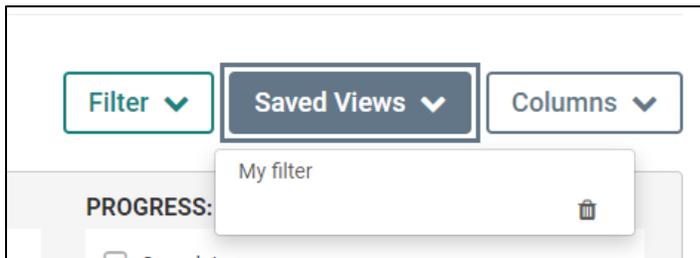
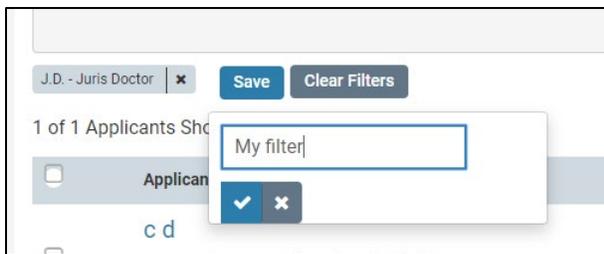
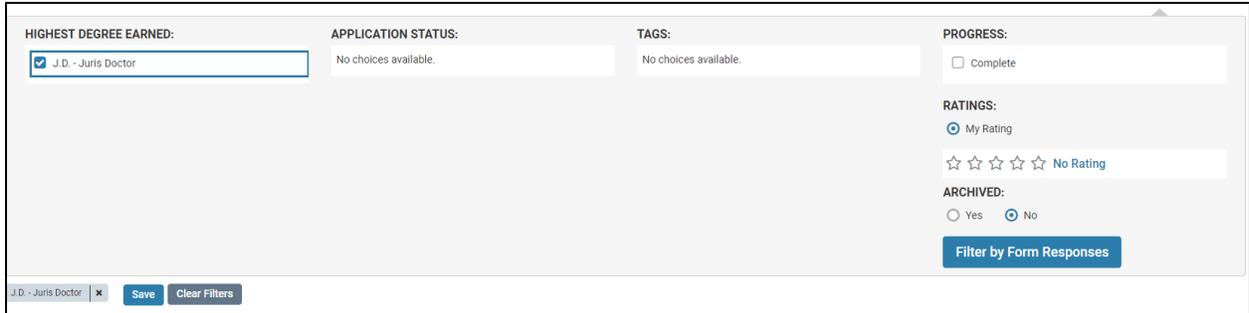
HIGHEST DEGREE EARNED: <input type="checkbox"/> J.D. - Juris Doctor	APPLICATION STATUS: No choices available.	TAGS: No choices available.	PROGRESS: <input type="checkbox"/> Complete
			RATINGS: <input checked="" type="radio"/> My Rating ☆☆☆☆☆ No Rating
			ARCHIVED: <input type="radio"/> Yes <input checked="" type="radio"/> No

Filter by Form Responses

4 of 4 Applicants Shown.

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/> c d <input type="checkbox"/> J.D. - Juris Doctor, The University of Chicago	May 29, 2019	Complete	+	☆☆☆☆☆

Once you have selected some criteria, it will appear below the grey section and show a “Save” button. By clicking “Save,” typing a label for your filter, and clicking the check mark, you can retain those selections for quick access through the **Saved Views** menu in the future. Click the **Filter** button again to close the grey section.



To sort the applicant pool according to **Applicant Name**, **Date Updated**, or other columns, simply click the arrows next to the column label.



Creating Custom Tags for Filtering

To add additional filtering options, custom **Tags** can be created for each search. Tags can be used in a number of ways according to unit needs—for example, if search committee members are responsible for reviewing only a portion of a large pool, Tags with members’ initials can be created to “assign” certain applications. Tags can also be used to identify particular characteristics of an applicant or applicants (e.g., research focus) which can then help Administrators or Evaluators sort and/or assign them more easily. Both Administrators and Evaluators can assign tags.

TIP: Any data added to the module is discoverable, including tags. Tags should not be used to identify applicant characteristics that relate to a protected class or are otherwise irrelevant to working at the University. Units that experience issues with appropriate use of tags should contact equalopportunity@uchicago.edu to request guidance and possibly training on compliant searches.

To add a new tag, check the box next to one or more applicants and click the blue “Tag” button in the toolbar. Select “Add new tag” to create a new one.

4 of 4 Applicants Shown.

Read	Email	Status	Tag	Disposition Code
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applicant Name	Date Updated	Applicant Status	Add new tag	ting
<input checked="" type="checkbox"/> c d J.D. - Juris Doctor, The University of Chicago Complete	May 29, 2019		<input type="checkbox"/>	☆☆☆☆☆
<input checked="" type="checkbox"/> Mitchell Kittlaus Complete	May 29, 2019		<input type="checkbox"/>	☆☆☆☆☆
<input type="checkbox"/> Scott Velasquez Complete	Mar 29, 2019		<input type="checkbox"/>	☆☆☆☆☆
<input type="checkbox"/> Cassandra Dunn			<input type="checkbox"/>	☆☆☆☆☆

A popup box will open. Type in the tag you want to add and click “Save”.

Add Tag ✕

MH to review

+ Add
Cancel

The tag will appear on the same row as the applicant’s name (you may need to refresh the page for it to appear). Once a new tag is added, it can be applied to any applicant using the blue Tag button in the toolbar. It will also show up in the filtering options and can be used by both Administrators and Evaluators to filter out untagged applications.

HIGHEST DEGREE EARNED:	APPLICATION STATUS:	TAGS:	PROGRESS:
<input type="checkbox"/> J.D. - Juris Doctor	No choices available.	<input checked="" type="checkbox"/> MH to review	<input type="checkbox"/> Complete
<p>RATINGS:</p> <input checked="" type="radio"/> My Rating ☆☆☆☆☆ No Rating			
<p>ARCHIVED:</p> <input type="radio"/> Yes <input checked="" type="radio"/> No			
Filter by Form Responses			

4 of 4 Applicants Shown.

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/> c d J.D. - Juris Doctor, The University of Chicago Complete	May 29, 2019		MH to review ✕ <input type="checkbox"/>	☆☆☆☆☆
<input type="checkbox"/> Mitchell Kittlaus Complete	May 29, 2019		MH to review ✕ <input type="checkbox"/>	☆☆☆☆☆
<input type="checkbox"/> Scott Velasquez Complete	Mar 29, 2019		<input type="checkbox"/>	☆☆☆☆☆
<input type="checkbox"/> Cassandra Dunn Complete	Mar 29, 2019		<input type="checkbox"/>	☆☆☆☆☆

25 ▾

Assigning Application Statuses

Only Administrators and Committee Managers can assign statuses. The Provost’s Office expects that the search Administrator or Committee Manager will update an applicant’s **Application Status** to reflect the decisions made throughout the evaluation process by the search committee. Individuals who proceed through **Does Not Meet Qualifications, Shortlist, Campus Interview/Offsite In-Person Interview/Remote Interview, Selected, and Not Selected** should have their applicant statuses updated during the review process to reflect their progression during the search. Other statuses may be used as appropriate; the full list available in the system is below. **Note that unless you have explicit permission from the Provost’s Office to make conditional offers, “Offer Made,” “Offer Accepted,” and “Offer Declined” are strictly reserved for use AFTER your appointment case has been reviewed.** Cases should not be sent to the Provost’s Office that indicate “Offer Made” before the case has been approved.

- Incomplete Application
- Does Not Meet Qualifications
- Qualified Applicant
- Ask for Letters
- Longlist
- Shortlist
- Waitlist
- Campus Interview
- Offsite In-Person Interview
- Remote Interview
- Selected
- Not Selected
- Withdraw
- Offer Made
- Offer Accepted
- Offer Declined

To change the Application Status for one or more applicants, select the checkboxes at the left side of the applicant(s) record(s) and click the “Status” menu from the blue toolbar that appears. Select the option from the dropdown menu that best represents the phase of review the applicants are moving into.

Applicant Name	Date Updated	Applicant Status	My Overall Rating
c d	May 29, 2019	Complete	☆☆☆☆
Mitchell Kittlaus	May 29, 2019	Complete	☆☆☆☆
Scott Velasquez	Mar 29, 2019	Complete	☆☆☆☆
Cassandra Dunn	Mar 29, 2019	Complete	☆☆☆☆

A popup box will open and ask you confirm the status change. By default, applicants cannot view new statuses or update their materials when a new status is applied. The one exception to this is **Ask for Letters**, which is optional and used solely to enable the requesting of recommendation letters from a shortlist. See **Requesting Letters of Recommendation During Evaluation** for information on how and when to do this. Applicants will not be notified of any status changes UNLESS you select the check box to send a message. If you choose to send a message, you can select from available message templates and customize the email.

Change Status ✕

Please confirm you wish to change the status of the selected applications to **Shortlist**.

With this status active:

- Applicants **cannot** view this status.
- Applicants **cannot** update their application materials.

Send message to selected applicants with this change.

✓ Save
Cancel

Please note that Application Statuses are different from Disposition Codes (page 49). One cannot substitute for the other, and both must be used throughout the search. Application Statuses show the movement of an applicant through the evaluation process, and several may be applied to a given application in sequence. Disposition Codes are the record of the final status of the applicant.

Emailing Applicants

In some cases you may need to email applicants using the system, e.g. to notify people who have not been selected. The simplest way to do this is to give them all a relevant application status, e.g. “Not Selected” (instructions for filtering and applying statuses are described in previous sections).

While the applicants are still selected, click the blue “Email” button (you can also skip the application status step if you are emailing them for a different reason, e.g. to notify them that their applications are missing documents).

✓	Applicant Name	Date Updated	Applicant Status	Tags	Disposition Codes	My Overall Rating
✓	J.D. - Juris Doctor, The University of Chicago	May 29, 2019	Not Selected	Alist MH ✕ CR to review ✕ KK to review ✕ MH completed review ✕ MH done ✕ +	★ ★ ★ ★ ☆	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px; display: inline-block;">Complete</div>
✓	Mitchell Kittlaus	May 29, 2019	Not Selected	CR to review ✕ MH to review ✕ +	★ ★ ★ ★ ☆	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px; display: inline-block;">Complete</div>
✓	Cassandra Martynow Ph.D. - Doctor of Philosophy, University of California, Berkeley	Feb 6, 2020	Not Selected	+	☆☆☆☆☆☆	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px; display: inline-block;">Complete</div>
✓	Cassandra Martynow	Mar 29, 2019	Not Selected	CR to review ✕ KK to review ✕ +	★ ★ ★ ★ ☆	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px; display: inline-block;">Complete</div>
✓	Scott Velasquez	Mar 29, 2019	Not Selected	archive ✕ KK to review ✕ MW to review ✕ +	★ ★ ★ ★ ☆	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px; display: inline-block;">Complete</div>

A popup box will open and ask for details on the message you would like to send. You will see the names of the applicants you have selected in the “To:” field. If you have a message template set up, you can select it from the dropdown menu. If not, add the name of the sender, a reply-to email address, a subject, and a customized message.

As in other places within the system, you can use system features to automatically personalize the message with the name of the applicant receiving it. To do this, select the “Insert placeholder” menu from the message body toolbar and click “ApplicantName.” The system will then auto-fill the names of each individual applicant when the message is sent. *Note that the applicants will not see any indication of who else received the message.*

Email Applicants ?

When messaging more than one applicant, recipients will never see the names or email addresses of other applicants being contacted.

To: c d Mitchell Kittlaus Cassandra Martynow Cassandra Martynow Scott Velasquez

Select a Message Template

Thank you for your application - regrets

From Name * Cassandra Martynow

Reply to email address * cdunn@uchicago.edu

Subject * Thank you for your application - regrets

Body *

Dear %ApplicantName%,

Thank you for your interest in our %PositionName% position in the %UnitName% at the University of Chicago.

The search attracted a strong pool of applicants and the selection process has been a difficult one. We regret to inform you that your application has not been selected to move forward.

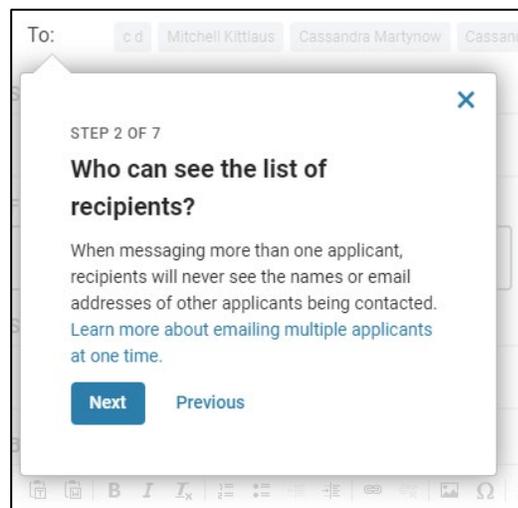
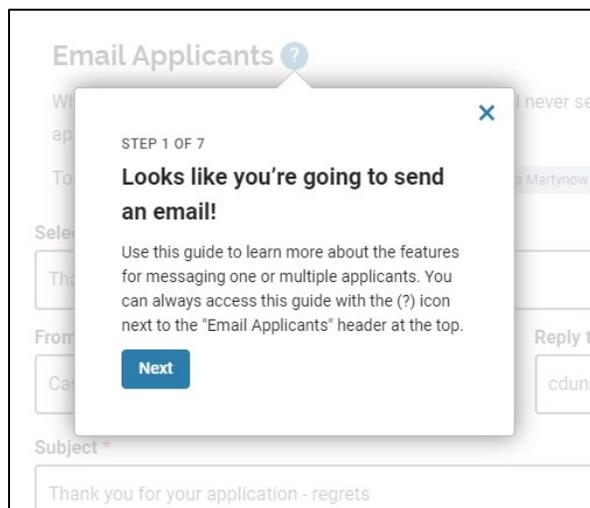
We wish you the best in your future endeavors.

Sincerely,

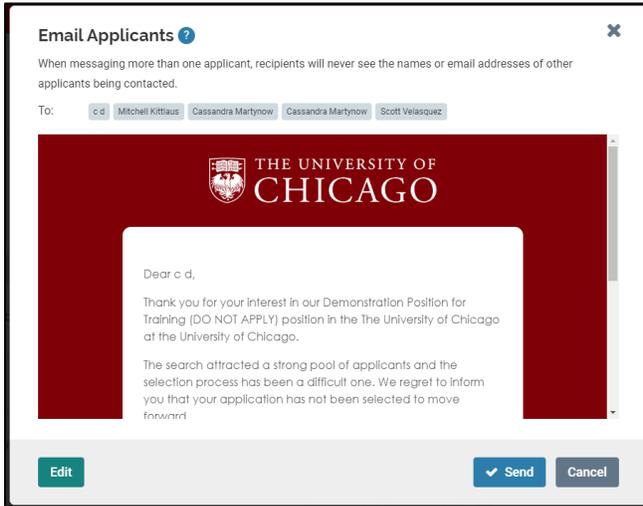
You must provide a message.

Preview Send Cancel

If you need more help, click on the blue “?” at the top to get step-by-step help in creating the message.



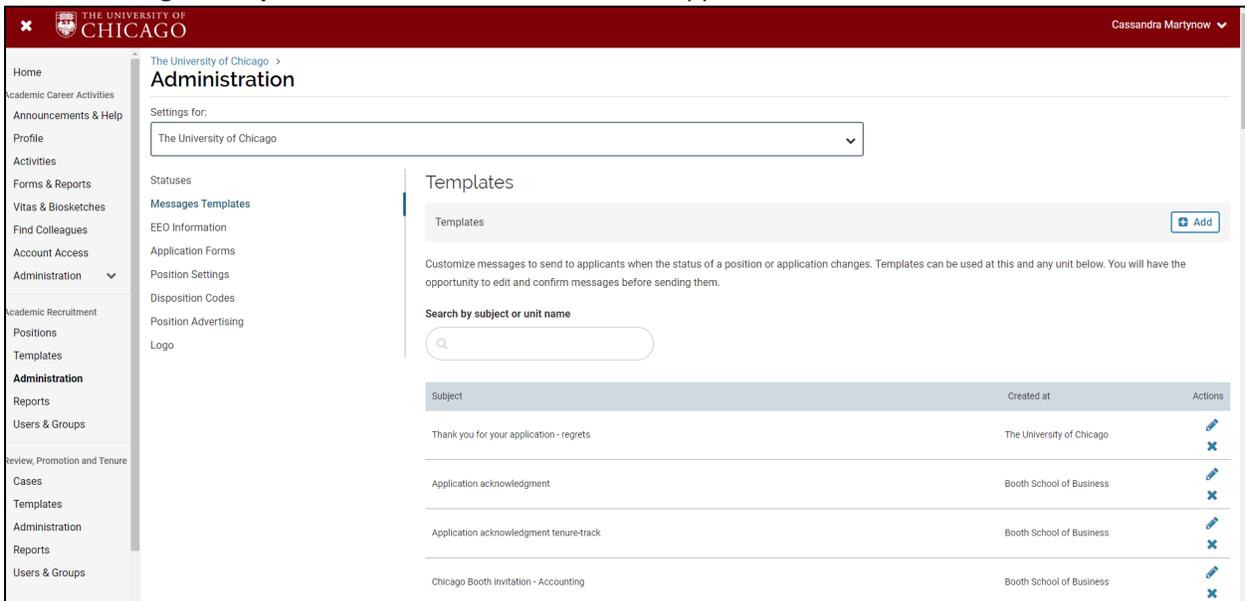
When you have completed your message, you can preview it using the “Preview” button at the bottom. If you have used the placeholders, the preview will show you the message going to the first applicant in the “To:” line.



To return to the email creation screen, click the “Edit” button at the bottom left. To send it directly, click “Send.” Choosing “Cancel” will exit the email creation process without saving your work.

Creating a Template Message

If you routinely email applicants during a search, you may wish to create a message template to limit the manual entry you have to do each time. Go to the **Administration** tab on the left side of the page and select **Messages Templates** from the second menu that appears.



Click “+Add” on the right. The **Add New Message Template** popup will open, and you can fill in the **From name, Reply to email address, Subject, and Message**. Due to a recent Interfolio update, you will now be able to edit the Subject in the future before sending out a message using this template. Note that the From and Reply to fields are not required, so you can leave those blank if the emails are likely to be sent from a different person each time.

The applicants you selected will be archived – you may need to refresh the page to see the reduced list.

To unarchive applications you have previously archived, select the **Filter** menu and select the radio button for “Yes” under “Archived”. The archived applications will appear.

The screenshot shows the 'Applicants' interface. At the top, there is a search bar and buttons for 'Filter', 'Saved Views', and 'Columns'. Below this are filter sections for 'HIGHEST DEGREE EARNED', 'APPLICATION STATUS', 'TAGS', 'PROGRESS', 'RATINGS', and 'ARCHIVED'. The 'ARCHIVED' section has radio buttons for 'Yes' and 'No', with 'Yes' selected. A 'Filter by Form Responses' button is at the bottom right of the filter area. Below the filters, there is a toolbar with 'Archived', 'Save', and 'Clear Filters' buttons. The main area shows '2 of 2 Applicants Shown.' and a table with columns: Applicant Name, Date Updated, Applicant Status, Tags, and My Overall Rating. Two applicants are listed: 'c d' (J.D. - Juris Doctor, The University of Chicago) and 'Mitchell Kittlaus'. Both have 'Complete' buttons and a rating of five stars.

Select the applicant or applicants you want to unarchive, then select the “more” button again from the blue toolbar. Select “Unarchive.” You will need to either change the “Archived” filter back to “No” or select the **Clear Filters** button above the applicant list to show the unarchived list again.

This screenshot shows the same 'Applicants' page, but with the 'ARCHIVED' filter set to 'No'. The toolbar now includes 'Read', 'Email', 'Status', 'Tag', 'Disposition Code', and an information icon. The table has a 'Download' column. A dropdown menu is open over the 'Download' column for the first applicant, showing options for 'Download' and 'Unarchive'. The 'Unarchive' option is highlighted. The 'c d' and 'Mitchell Kittlaus' applicants are still listed with their details and 'Complete' buttons.

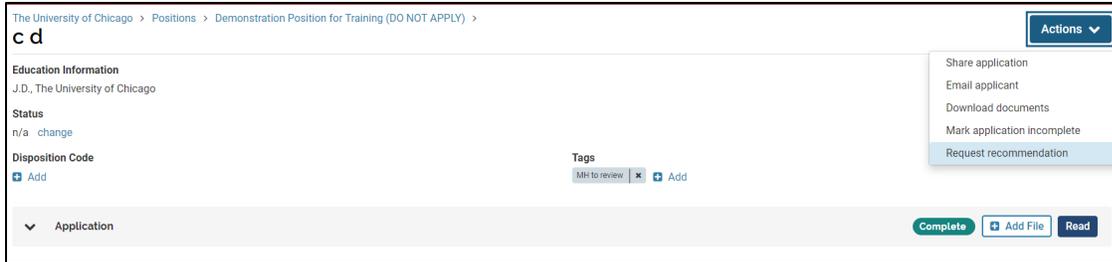
Requesting Letters of Recommendation During Evaluation

If recommendation letters are needed and were not required from all applicants upfront, there are two ways they can be requested during the evaluation period.

With Pre-Provided Contact Information

If an applicant was asked to provide a list of individuals who could be contacted for a recommendation letter, Administrators can request letters from those contacts on behalf of an applicant without involving the applicant in the request process. As letters are received, they will automatically be added to the applicant’s materials for review.

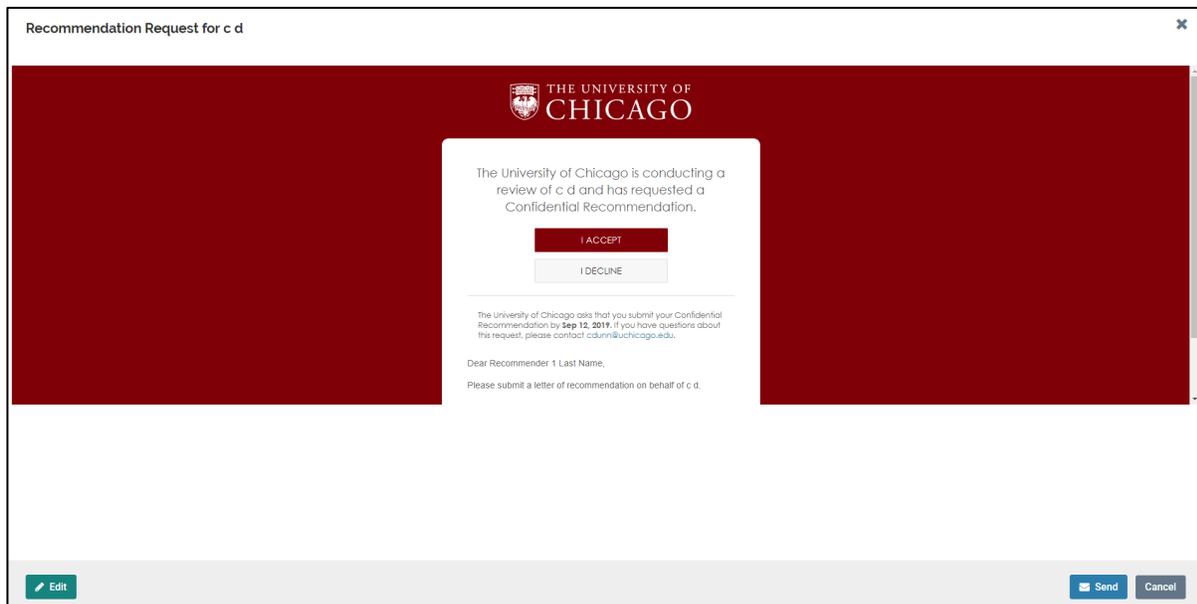
To request letters on behalf of an applicant using contact information they shared, go to the applicant list and click on the blue linked applicant name. On the applicant’s profile page, click the **Actions** drop down menu in the top right and select “Request recommendation.”



A new screen will open and ask for information on the recommenders. Add the First Name, Last Name, and Email for the first recommender, and click “+Add Another Recommender” to repeat the process if necessary. Multiple letters can be requested at once. You can optionally add a deadline using the calendar field (note that recommenders can’t submit after this deadline) and must personalize a message (include instructions to the recommenders here if you are seeking specific information on the applicant’s work, experience, etc.). See the help text in purple next to the message body for information on how to use mail merge tags to add the first and last name of each recommender to the message automatically.

You can add files (e.g. CV) by clicking the “+Add” button beneath the message field. The button will open a list of the files uploaded with the application. The letter writer will receive the message you create and appended file(s) along with instructions for submitting the letter. **Recommenders are not able to access applicant materials unless you add the files.**

You can also preview your message by clicking on the “Preview” button at the bottom. If you need to continue editing the message or would like to double-check that you’ve added the correct names, click the “Edit” button in the bottom left corner of the preview screen. Clicking the “X” in the top right will exit the letter request process.



To understand the reference submission process from the letter writer’s perspective, please review [For External Evaluators: Guide to Providing Requested Evaluations](#).

Using the “Ask for Letters” Application Status

An alternative method for requesting letters during the evaluation period for a search is to use Interfolio’s multi-stage search process as outlined below.

Once you have selected a shortlist of candidates from whom you need confidential letters, apply the “Ask for Letters” application status (instructions for filtering and applying statuses are described in previous sections). You’ll note that this status has unique permissions which allow applicants with the status to update their materials.

Filter the list of applicants to show everyone who does not have the “Ask for Letters” status and archive them using the method described in the section on archiving applications.

Edit the position to add a new document requirement for Confidential Letter of Recommendation or Evaluation and set the number you require. This will create a space for the “Ask for Letters” applicants to add the names and emails of recommenders and request confidential letters within the system.

Return to the list of applicants and select all of the applicants with the “Ask for Letters” application status. When the blue toolbar appears, click the “Email” button.

4 of 4 Applicants Shown.

Read	Email	Status	Tag	Disposition Code	i
<input checked="" type="checkbox"/>					
Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating	
c d	May 29, 2019	Ask for Letters	+	☆☆☆☆☆	
J.D. - Juris Doctor, The University of Chicago					
<input checked="" type="checkbox"/>					
Mitchell Kittlaus	May 29, 2019	Ask for Letters	+	☆☆☆☆☆	
<input checked="" type="checkbox"/>					
Scott Velasquez	Mar 29, 2019	Ask for Letters	+	☆☆☆☆☆	
<input checked="" type="checkbox"/>					
Cassandra Dunn	Mar 29, 2019	Ask for Letters	+	☆☆☆☆☆	

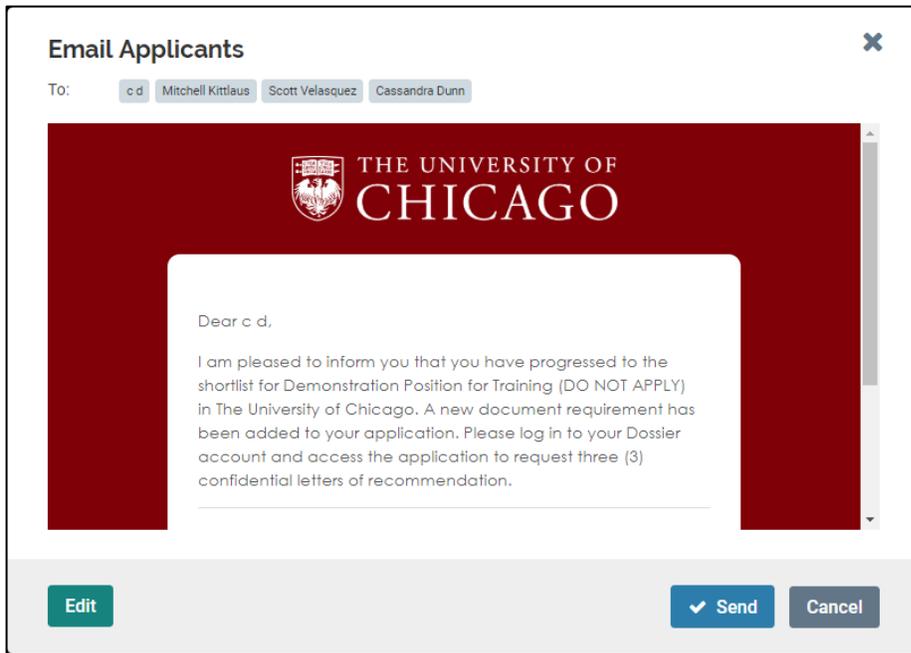
A popup box will open and ask for details on the message you would like to send. You will see the names of the applicants you have selected in the “To:” field. If you have a message template set up, you can select it from the dropdown menu. If not, add the name of the sender, a reply-to email address, a subject, and a customized message.

As in other places within the system, you can use system features to automatically personalize the message with the name of the applicant receiving it. To do this, select the “Insert placeholder” menu from the message body toolbar and click “ApplicantName.” The system will then auto-fill the names of each individual applicant when the message is sent. *Note that the applicants will not receive any indication of who else received the message.*

The message body should indicate that applicants need to log in to their Dossier and open their application. Once there, they can fulfill the new requirement. It should also be clearly indicated if you have a specific deadline by which recommenders must submit letters, so that applicants can notify their recommenders accordingly.

The screenshot shows the "Email Applicants" interface. At the top, there is a title "Email Applicants" and a close button. Below the title, the "To:" field contains three selected applicants: "cd", "Mitchell Kittlaus", "Scott Velasquez", and "Cassandra Dunn". A "Select a Message Template" dropdown menu is currently empty. The "From Name *" field is filled with "Cassandra Dunn", and the "Reply to email address *" field is filled with "cdunn@uchicago.edu". The "Subject *" field contains "Request for Letters of Recommendation". The "Body *" field has a rich text editor toolbar with an "Insert placeholder" dropdown menu open, showing options for "ApplicantName", "PositionName", and "UnitName". The body text reads: "Dear ,
I am pleased to inform you that you have progressed to the shortl
has been added to your application. Please log in to your Dossier UnitName ApplicantName application to request three (3) confidential letters
of recommendation." The "body p" label is visible at the bottom left of the text area. At the bottom of the form, there are three buttons: "Preview", "Send", and "Cancel".

When you have completed your message, you can preview it using the “Preview” button at the bottom. If you have used the placeholders, the preview will show you the message going to the first applicant in the “To:” line.



To return to the email creation screen, click the “Edit” button at the bottom left. To send it directly, click “Send.” Choosing “Cancel” will exit the email creation process without saving your work.

Once you have completed this process, applicants with the “Ask for Letters” status will be notified to log in to their account and add letters of recommendation.

TIP: Using this method technically allows the “Ask for Letters” applicants to update their existing materials as well, so it is recommended that your message include explicit instructions not to update anything else, or indicate that no new materials outside of the letters will be considered. It is also conceivable that applicants who do NOT have the “Ask for Letters” status could log in to their Dossier, access their application, and see that there is a new document requirement. Since they will not have the status that allows them to make updates, however, they will not be able to take any action.

Selecting the Final Candidate

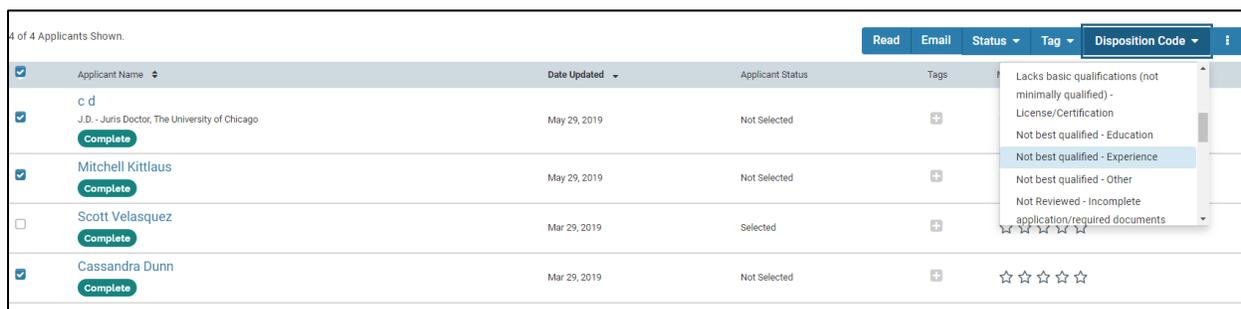
Once your evaluation process has concluded, you will follow the standard process for submitting an appointment case to the Provost’s Office. The primary difference will be the “Provost Dossier,” which is generated differently than it was in ACO. You should assign the chosen applicant(s) the “Selected” status, assign the others “Not Selected,” and follow the instructions in the section on creating the “Provost Dossier.” *Note that this is a temporary process while reporting integrations are being developed.*

4 of 4 Applicants Shown.				Read	Email	Status	Tag	Disposition Code	
<input type="checkbox"/>	Applicant Name c d J.D. - Juris Doctor, The University of Chicago Complete	Date Updated	May 29, 2019			Not Selected			Overall Rating ☆☆☆
<input type="checkbox"/>	Applicant Name Mitchell Kittlaus Complete	Date Updated	May 29, 2019			Not Selected			Overall Rating ☆☆☆
<input checked="" type="checkbox"/>	Applicant Name Scott Velasquez Complete	Date Updated	Mar 29, 2019			Campus Interview			Overall Rating ☆☆☆
<input type="checkbox"/>	Applicant Name Cassandra Dunn Complete	Date Updated	Mar 29, 2019			Not Selected			Overall Rating ☆☆☆

Assigning Disposition Codes

UChicago has created distinct disposition codes to identify why an applicant falls out of consideration (i.e., the reason for rejection). These codes are necessary to meet federal reporting requirements and they are a mandatory part of the searching and screening process. The UChicago disposition codes are set at the institutional level by the Equal Opportunity Programs Office.

To assign a disposition code to an applicant, go to the applicant list and check the box next to the applicant name(s). Click the Disposition Code button from the blue tool bar at the top right side of the applicant list. Select the disposition code the search committee has determined best represents the reason the applicant is being removed from consideration. If you selected multiple applicants, the disposition code will be applied to the batch. Repeat this process for all applicants who are not moving forward.



The screenshot shows a table with 4 applicants. The columns are Applicant Name, Date Updated, Applicant Status, and Tags. A dropdown menu is open over the 'Disposition Code' button, showing options: Lacks basic qualifications (not minimally qualified) - License/Certification, Not best qualified - Education, Not best qualified - Experience, Not best qualified - Other, Not Reviewed - Incomplete, and application/required documents. The 'Not best qualified - Experience' option is highlighted.

Applicant Name	Date Updated	Applicant Status	Tags
<input checked="" type="checkbox"/> c d J.D. - Juris Doctor, The University of Chicago Complete	May 29, 2019	Not Selected	+
<input checked="" type="checkbox"/> Mitchell Kittlaus Complete	May 29, 2019	Not Selected	+
<input type="checkbox"/> Scott Velasquez Complete	Mar 29, 2019	Selected	+
<input checked="" type="checkbox"/> Cassandra Dunn Complete	Mar 29, 2019	Not Selected	+ ☆☆☆☆☆

It is University policy that ALL candidates must have a disposition code before a search is closed. The Equal Opportunity Programs Office has provided a guide to disposition codes and the related application statuses, which can be viewed online [here](#), as well as some definitions for the codes [here](#).

Please note that Disposition Codes are different from Application Statuses (page 39). One cannot substitute for the other, and both must be used throughout the search. Application Statuses show the movement of an applicant through the evaluation process, and several may be applied to a given application in sequence. Disposition Codes are the record of the final status of the applicant.

TIP: It is a best practice to assign disposition codes throughout the evaluation process as it becomes clear why certain candidates are not selected. The best order in which to approach this is to 1) assign the appropriate application status to indicate the stage at which the applicant stopped moving forward, 2) assign the appropriate disposition code for why the applicant stopped moving forward, and 3) archive the application so that it “freezes” that applicant at that stage and removes them from the visible pool.

Creating the Appointment Case

Portions of the process outlined below are temporary and should be used for current searches while the Provost’s Office works on a long-term solution.

The “Provost Dossier” report in ACO consisted of three elements:

1. Posting Details
2. Applicant Log
3. Notes/History on Posting.

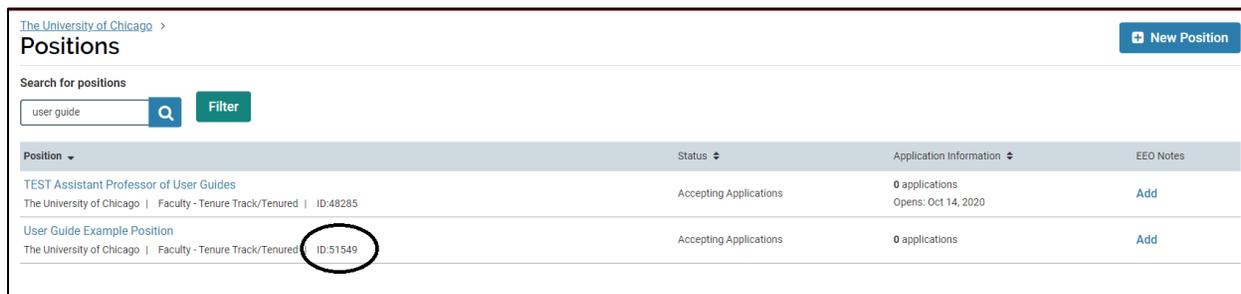
In the short-term, only the first two elements will be required for appointment cases where the search was conducted in the AR module. The Provost's Office will audit the Notes/History on Posting equivalent directly within the system.

The contents of your appointment case sent to the Provost's Office will vary depending on the type of position, but must always include the Position ID, which can be added to the Search Narrative or Dean's memo. Other elements may include:

1. Hard copies of advertisements
2. The Application Status Change Log (see instructions below)
3. Everything the applicant has submitted in AR
4. All other letters
5. Memoranda and approvals
6. EEO summary

Position ID

The Position ID generated automatically by the AR module *must* be added to the Search Narrative you submit with your appointment case. If there is no Search Narrative, it should be listed on the Dean's memo. To find the correct Position ID, log in to the administrative dashboard and select the **Positions** tab on the left. If necessary, use the search bar to search keywords related to the position title. Once the relevant position appears, the 5-digit ID listed there is the Position ID you will include in your case.



The screenshot shows the 'Positions' page in the administrative dashboard. At the top, there is a search bar with the text 'user guide' and a 'Filter' button. Below the search bar is a table with the following columns: Position, Status, Application Information, and EEO Notes. The table contains two rows of data. The first row is for 'TEST Assistant Professor of User Guides' with ID 48285. The second row is for 'User Guide Example Position' with ID 51549, which is circled in red. The 'Status' for both is 'Accepting Applications' and 'Application Information' shows '0 applications'.

Position	Status	Application Information	EEO Notes
TEST Assistant Professor of User Guides The University of Chicago Faculty - Tenure Track/Tenured ID:48285	Accepting Applications	0 applications Opens: Oct 14, 2020	Add
User Guide Example Position The University of Chicago Faculty - Tenure Track/Tenured ID:51549	Accepting Applications	0 applications	Add

Please note: the AR module can attach several different 5-digit numbers to your posting that are frequently mistaken for the Position ID. The numbers at the end of your Position URL (<http://apply.interfolio.com/XXXXX>) are not the same as the Position ID, and cannot be used to search for a given position within the module. Similarly, any unit-specific "Position ID or Requisition Number" you may have added to the Internal Notes page is not the one you must add to your appointment case.

Advertisements

If your posting has a deadline, you must create a copy of the advertisement in the AR module by that date, or else download and print the closed posting, which will automatically include the "sign in" information and potentially obscure some of your posting details. First locate your posting on the job board and select "print" from within your browser tools.

DEMO - PROVOST DOSSIER

The University of Chicago

Location
Chicago

Open Date
May 31, 2019

Description
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Qualifications
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Application Instructions
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Equal Employment Opportunity Statement
The University of Chicago is an Affirmative Action/Equal Opportunity/Disabled/Veterans Employer and does not discriminate on the basis of race, color, religion, sex, sexual orientation, gender identity, national or ethnic origin, age, status as an individual with a disability, protected veteran status, genetic information, or other protected classes under the law. For additional information please see the University's Notice of Nondiscrimination.
Job seekers in need of a reasonable accommodation to complete the application process should call 773-702-1032 or email equalopportunity@uchicago.edu with their request.

Save the document as a PDF and/or print it. Make sure you include headers and footers so that your PDF shows the date downloaded and the posting URL.

Print
Total: 2 pages
Save Cancel

Destination: Save as PDF

Pages: All

Layout: Portrait

More settings

Paper size: Letter

Pages per sheet: 1

Margins: Default

Scale: Default

Options: Headers and footers
 Background graphics

5/31/2019 Apply - Interfolio

DEMO - PROVOST DOSSIER

The University of Chicago

Location
Chicago

Open Date
May 31, 2019

Description
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Qualifications
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Application Instructions
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

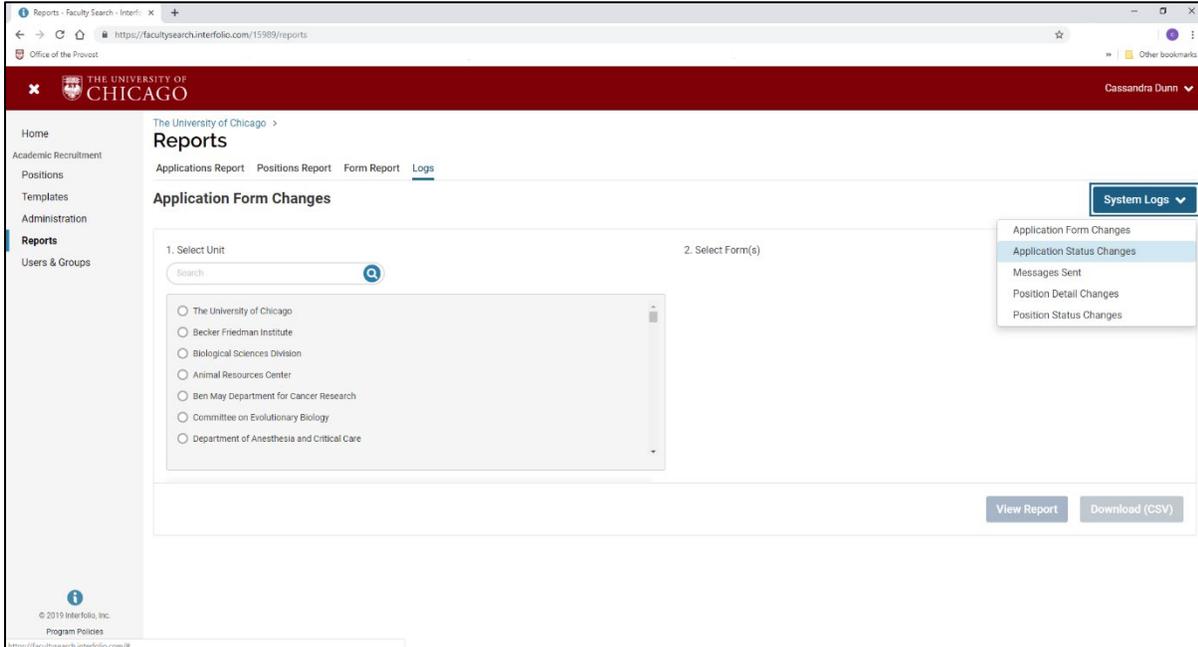
THE UNIVERSITY OF CHICAGO

<https://apply.interfolio.com/62155> 1/2

TIP: if you are not signed in to Interfolio when you save this document as a PDF, it will include a “Sign in” button on the PDF that will obscure some of your posting. If this happens, simply sign in and follow the steps again. If the posting’s deadline has passed, however, you will not be able to sign in and print the posting (it will automatically redirect you to your administrative dashboard). In this case, attempt to print the posting to a PDF and determine whether the button obscures critical data such as your position description. The EEO statement is set by the University and cannot be changed, so if the button obscures only some of that statement and not the other details of your posting, please submit it as is.

Application Status Change Log

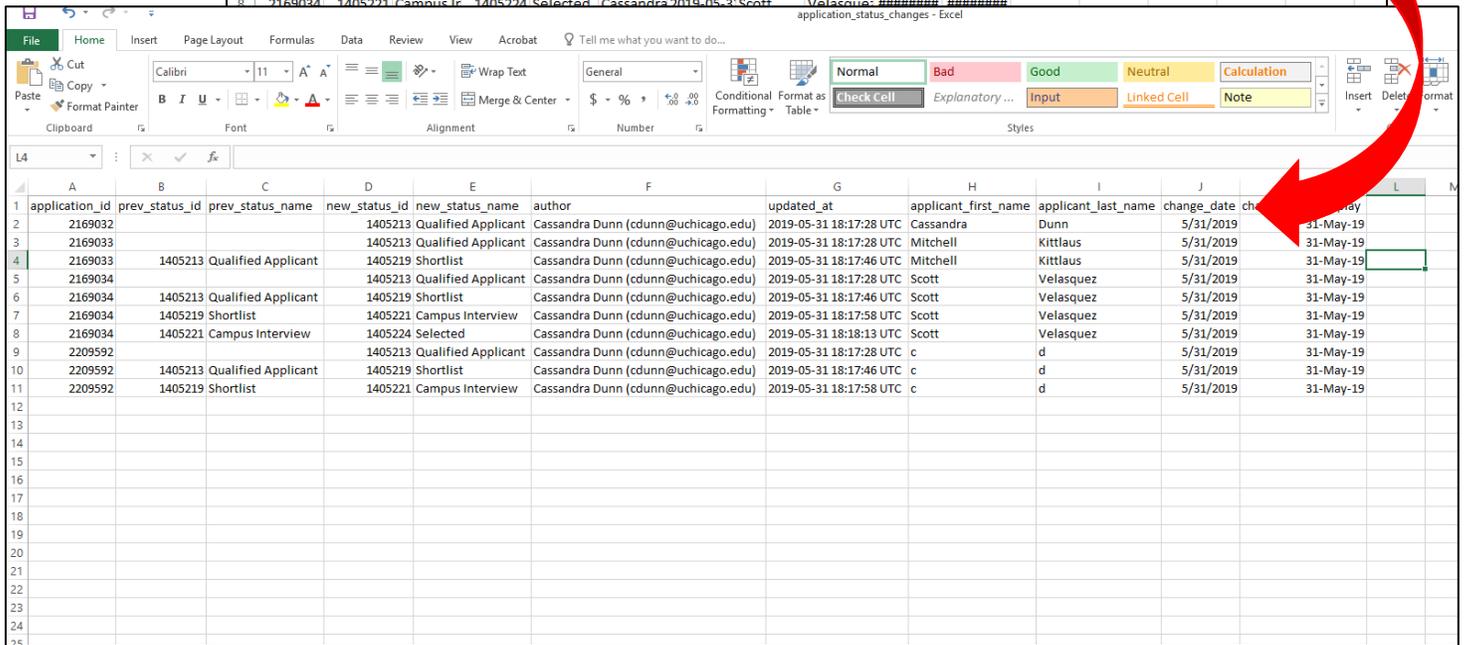
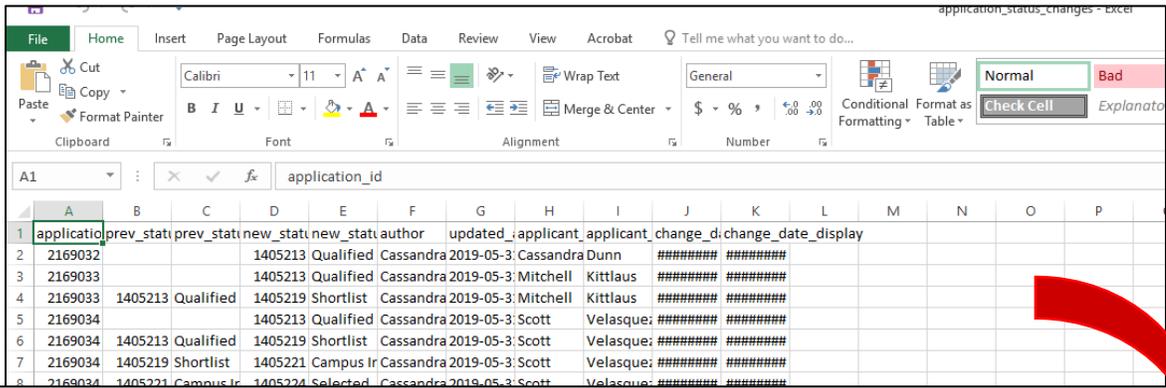
When you are logged in to your administrative dashboard, select the **Reports** tab on the left. The default page that will open is the **Applications Report** feature. Select **Logs** from the tabs at the top. When the Logs page opens, select the “System Logs” dropdown menu and choose “Application Status Changes.” *Note that if you have not used any application statuses in your applicant pool, no data will appear here. In the event that you have only one applicant and have not used statuses, for example, you will need to use the “Applications Report” tab to download your applicant list.*



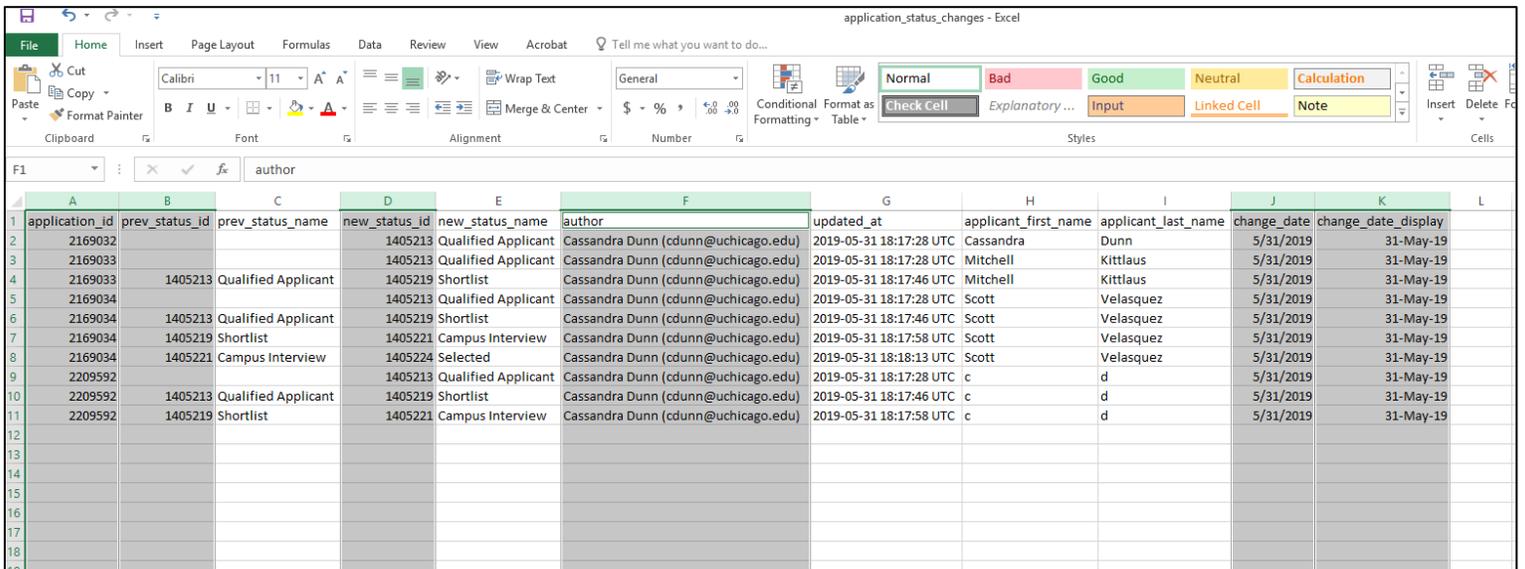
Use the search bar to search for the position title, select it, and click “Download (CSV).” If you have multiple positions with the same title, you can click “View Report” to check whether you have the correct data. It will show a report dashboard at the bottom of the page.



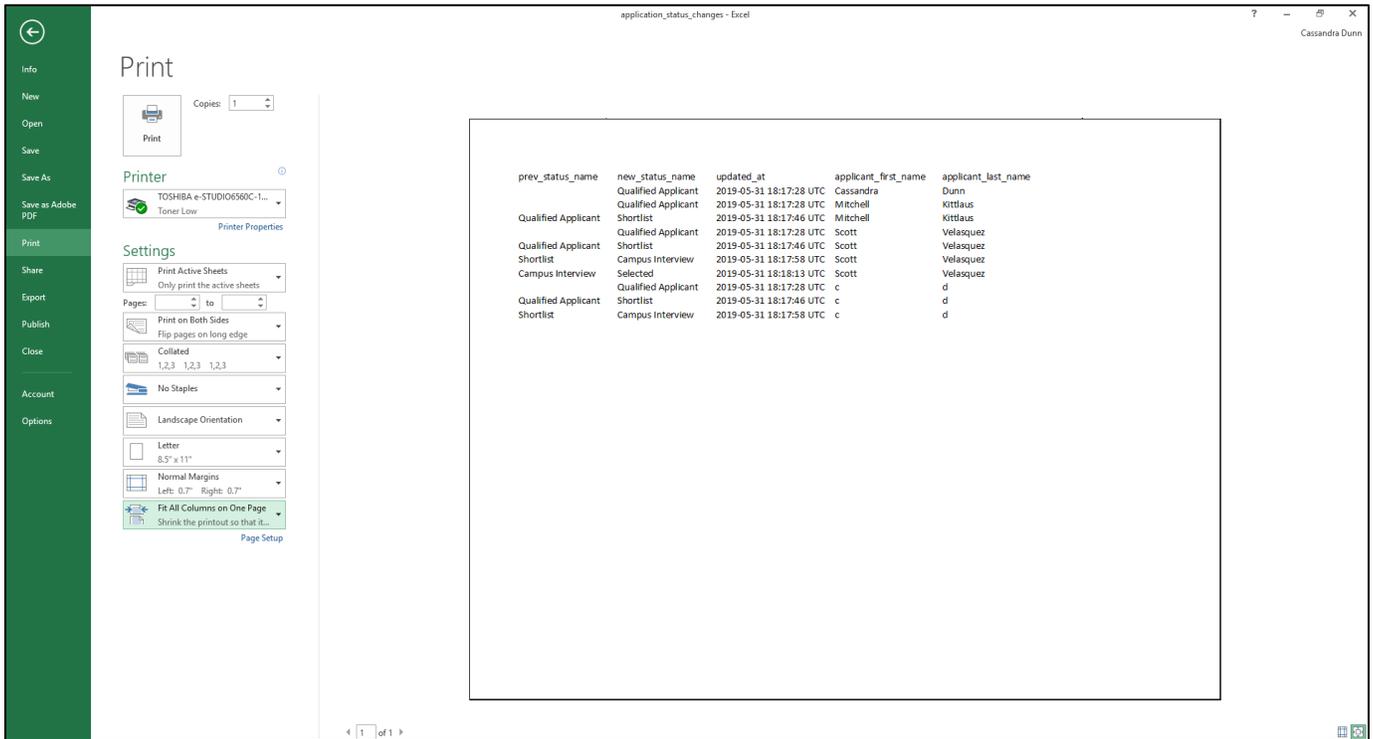
When the CSV has downloaded, open the CSV file and expand the rows so you can view and double-check the data. It should be organized by applicant in columns H and I.



If you are able to print this directly on large paper, you can do so. Otherwise, it may help you to hide some of the columns (A, B, D, F, J, K) before printing. Right click on the column and select "Hide."

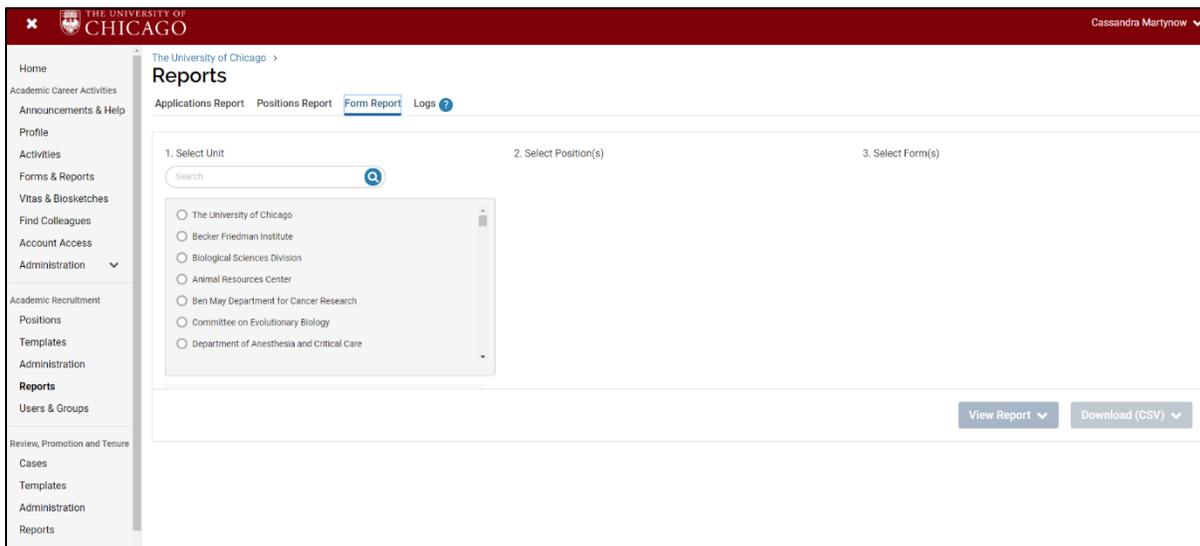


Once you have a usable CSV size, print it. Use landscape orientation and fit all the columns on one page to make it more legible. This will be your Application Status Change Log for your case file.



EEO Summary

If you need to include a summary of the EEO response data in your appointment case, you can do so through the reporting feature. When you are logged in to your administrative dashboard, select the **Reports** tab on the left. The default page that will open is the **Applications Report** feature. Select **Form Report** from the tabs at the top.



Select the unit in which the position lives from the **Select Unit** box. You will only see units to which you have access. Once you have selected a unit, the **Select Positions** box will update to show available positions in that unit. Search for and select the position. The **Select Form(s)** box will update to show available forms for that position. Choose the EEO_AA Form and click the “Download (CSV)” button at the bottom. Unless you have EEO-level access, you will download a summary of the EEO form responses.

TIP: if you have 5 or fewer applicants, the system will not allow you to download the EEO summary. This is because the data can’t be properly anonymized at that scale. Note this on your appointment case so that the Provost’s Office can pull the individual data if necessary.

Closing a Search

Once the search has ended and all candidates from the search have gone through the approval process in Workday and all offers made have been either accepted or declined, the following steps must be performed in AR to officially close the posting.

First, ensure that all applicants have the correct application status (e.g. “Not Selected,” “Offer Accepted”) and the correct disposition code.

Select the “Position Actions” menu in the top right and click “Close position.”

The screenshot shows the 'Position Actions' dropdown menu for a 'Demonstration Position for Training (DO NOT APPLY)'. The menu options include: Edit Position, View committee, View position activity Log, View position details, View referral sources, Add new applicant, and Close position. Below the menu, a table lists four applicants with their names, dates, and statuses.

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
c d J.D. - Juris Doctor, The University of Chicago	May 29, 2019	Not Selected		☆☆☆☆☆
Mitchell Kittlaus	May 29, 2019	Not Selected		☆☆☆☆☆
Scott Velasquez	Mar 29, 2019	Offer Accepted		☆☆☆☆☆
Cassandra Dunn	Mar 29, 2019	Not Selected		☆☆☆☆☆

A page will open that asks if a final candidate was selected. If “No,” it will provide an optional comment box where you can indicate why no one was chosen.

The screenshot shows the 'Closing Position' form. It asks 'Was an applicant selected?' with radio buttons for 'Yes' and 'No'. The 'No' option is selected. Below this is a 'Notes' section with a text area for an optional comment. At the bottom are 'Close Position' and 'Cancel' buttons.

Was an applicant selected?

Yes

No

Notes

You may leave an optional note here to document why no selection was made.

If one or more candidates were selected, click the radio button for “Yes” and click the button for “+Add Applicant” that appears. A popup box will open and show the applicant list – click “Add” next to the candidate(s) chosen.

Add Selected Applicant ✕

Search for name or email address Filter by Status

All Statuses ▼

Name ^	Email ↕	Status ↕	Actions
c d	cassandrakdunn@gmail.com	Not Selected	Add
Cassandra Dunn	cdunn@uchicago.edu	Not Selected	Add
Mitchell Kittlaus	mkittlaus@uchicago.edu	Not Selected	Add
Scott Velasquez	svelasquez@uchicago.edu	Offer Accepted	Add

When you have finished your selection(s), click “Close” and the **Closing Position** screen will show the selections you have made. If complete, click “Close Position.”

The University of Chicago > Demonstration Position for Training (DO NOT APPLY) >

Closing Position

Was an applicant selected?

Yes

No

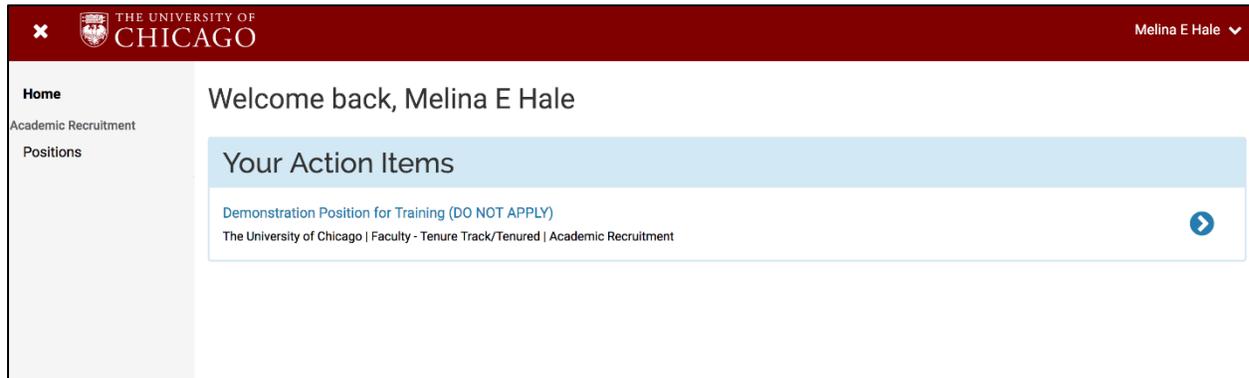
Select Applicant(s)

Name ^	Email ↕	Status ↕	Actions
Scott Velasquez	svelasquez@uchicago.edu	Offer Accepted	Remove

Help for Evaluators

Reading Applications

Log in to the Academic Recruitment system using your CNet ID and password. If you have been assigned as an Evaluator to an existing position, it will appear in your **Action Items** on your home page.



THE UNIVERSITY OF CHICAGO

Melina E Hale

Home

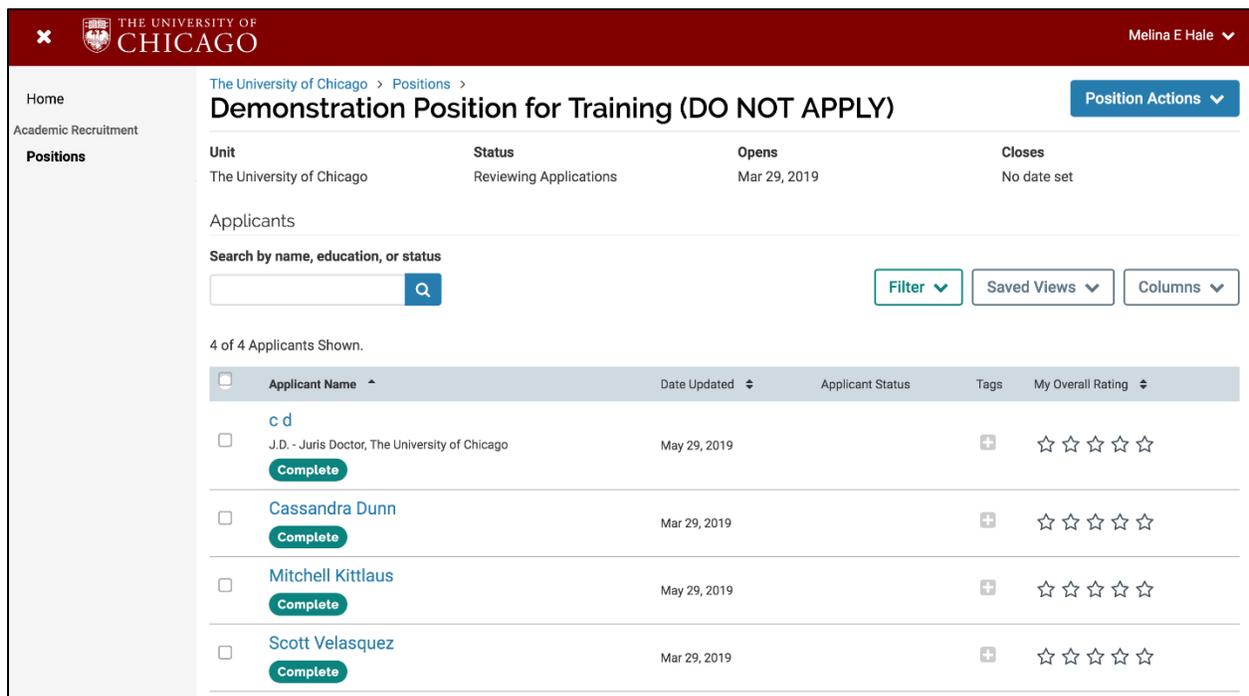
Welcome back, Melina E Hale

Your Action Items

Demonstration Position for Training (DO NOT APPLY)

The University of Chicago | Faculty - Tenure Track/Tenured | Academic Recruitment

To access the position, click on the blue link in your Action Items. The system will open the position page and you will see a list of applicants to that position.



THE UNIVERSITY OF CHICAGO

Melina E Hale

Home

The University of Chicago > Positions >

Demonstration Position for Training (DO NOT APPLY)

Position Actions

Unit	Status	Opens	Closes
The University of Chicago	Reviewing Applications	Mar 29, 2019	No date set

Applicants

Search by name, education, or status

4 of 4 Applicants Shown.

Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input type="checkbox"/> c d J.D. - Juris Doctor, The University of Chicago Complete	May 29, 2019		+	☆☆☆☆☆
<input type="checkbox"/> Cassandra Dunn Complete	Mar 29, 2019		+	☆☆☆☆☆
<input type="checkbox"/> Mitchell Kittlaus Complete	May 29, 2019		+	☆☆☆☆☆
<input type="checkbox"/> Scott Velasquez Complete	Mar 29, 2019		+	☆☆☆☆☆

To start reviewing applications, select an applicant's name. If you check the boxes next to the applicants' names you can select multiples at one time, or you can select all applicants by clicking the box at the top of the table. This will allow you to review applicants in succession without having to return to the list, or to make changes in bulk.

After checking the box or boxes for the applicants you want, a blue button toolbar will appear. Click the “Read” button.

The screenshot shows the University of Chicago Academic Recruitment portal. The main heading is "Demonstration Position for Training (DO NOT APPLY)". Below this, there are fields for Unit (The University of Chicago), Status (Reviewing Applications), Opens (Mar 29, 2019), and Closes (No date set). A search bar is present with the text "Search by name, education, or status". A toolbar at the top right includes "Filter", "Saved Views", and "Columns". Below the search bar, it says "4 of 4 Applicants Shown." and a toolbar with "Read", "Tag", and a menu icon. The applicant list is as follows:

<input checked="" type="checkbox"/>	Applicant Name	Date Updated	Applicant Status	Tags	My Overall Rating
<input checked="" type="checkbox"/>	c d J.D. - Juris Doctor, The University of Chicago Complete	May 29, 2019		+	☆☆☆☆☆
<input checked="" type="checkbox"/>	Cassandra Dunn Complete	Mar 29, 2019		+	☆☆☆☆☆
<input checked="" type="checkbox"/>	Mitchell Kittlaus Complete	May 29, 2019		+	☆☆☆☆☆
<input checked="" type="checkbox"/>	Scott Velasquez Complete	Mar 29, 2019		+	☆☆☆☆☆

This will open all of the applications you selected in the Document Viewer window. Within the Viewer, you can quickly cycle through the materials of an individual application using the controls at the bottom or the bookmarks on the left. You can also cycle through applicants using the controls at the top left.

The screenshot shows the Document Viewer for the application of Cassandra Dunn. The sidebar on the left contains the following items:

- APPLICATION
 - CDunn_CV
 - CDunn_CoverLetter
 - CDunn_References
 - CASSANDRA DUNN
 - REFERENCES
 - Form Responses
- INTERNAL DOCUMENTS

The central document viewer displays the resume for CASSANDRA DUNN. The resume content is as follows:

CASSANDRA DUNN
Address - Phone
Email - LinkedIn Profile - Twitter/Blog/Portfolio

To replace this text with your own, just click it and start typing. Briefly state your career objective, or summarize what makes you stand out. Use language from the job description as keywords.

EXPERIENCE

.....
 DATES FROM – TO
 JOB TITLE, COMPANY
 Describe your responsibilities and achievements in terms of impact and results. Use examples, but keep it short.

.....
 DATES FROM – TO
 JOB TITLE, COMPANY
 Describe your responsibilities and achievements in terms of impact and results. Use examples, but keep it short.

EDUCATION

.....
 MONTH YEAR
 DEGREE TITLE, SCHOOL
 It's okay to brag about your GPA, awards, and honors. Feel free to summarize your coursework too.

.....
 MONTH YEAR
 DEGREE TITLE, SCHOOL
 It's okay to brag about your GPA, awards, and honors. Feel free to summarize your coursework too.

SKILLS

- List your strengths relevant for the role you're applying for
- List one of your strengths
- List one of your strengths
- List one of your strengths

ACTIVITIES

Use this section to highlight your relevant passions, activities, and how you like to give back. It's good to include Leadership and volunteer experiences here. Or show off important extras like publications, certifications, languages and more.

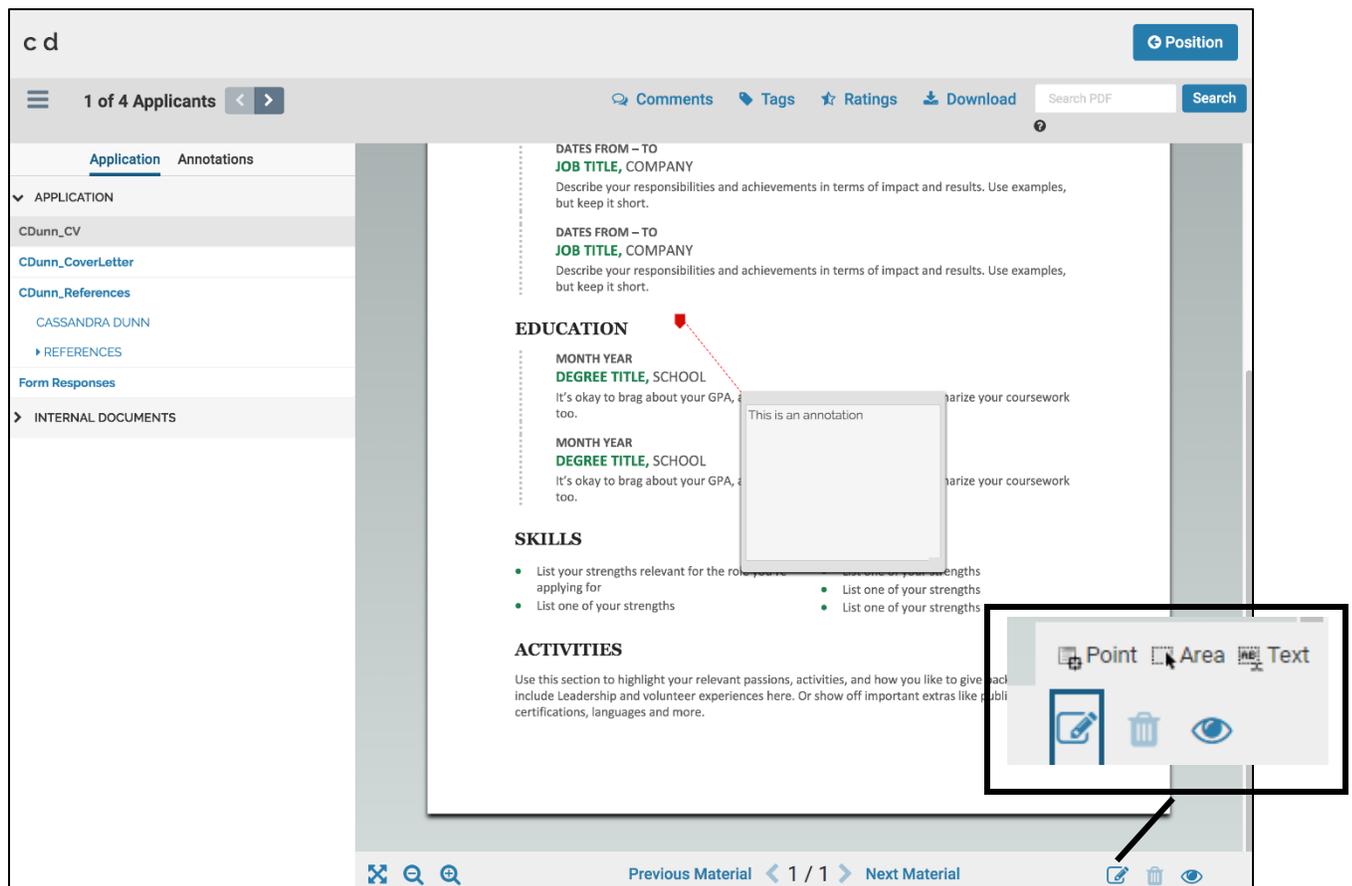
The bottom toolbar includes "Previous Material", "1 / 1", and "Next Material".

Review and Rate Applicants

In reviewing an application, Evaluators have several tools available to use. These tools are optional and can be used as determined by the search committee. **Please note that any information you put into the system is discoverable and must be in compliance with University policies.** While search committees are encouraged to use the system features detailed in the following sections, units should also reach out to equalopportunity@uchicago.edu if guidance on appropriate comments, annotations, and ratings is needed.

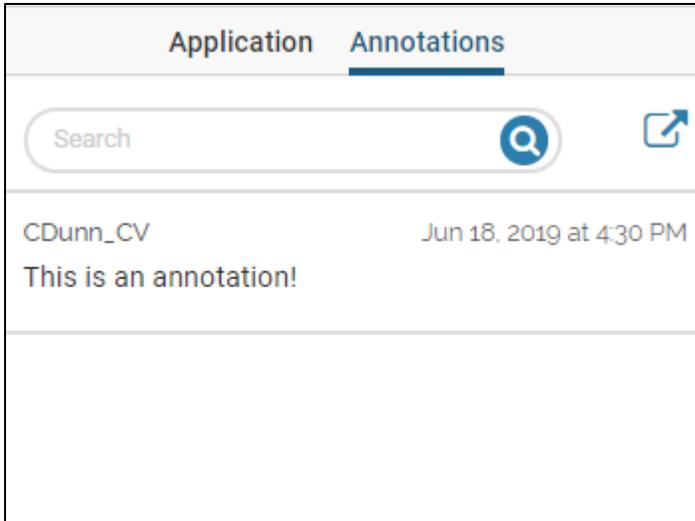
Annotating Materials

Annotations are notes you make on an application while reading, and are not shared with your search committee members. The annotation toolbar is located in the bottom right corner of the Document Viewer. To add an annotation, click on the pencil icon and choose either a Point, Area, or Text annotation. Click (or click and drag for Area/Text annotations) on the application where you want to add the annotation and type in the box that appears. Clicking outside the box will save your annotation and you can hide or display all annotations with the eye icon in the bottom right. You can also click on an annotation and use the trashcan icon in the bottom right to delete it.



The screenshot displays a web interface for reviewing an application. The top navigation bar includes a 'Position' button, a '1 of 4 Applicants' indicator, and options for 'Comments', 'Tags', 'Ratings', and 'Download'. A search bar is also present. The main content area shows a document with sections for 'EDUCATION' and 'SKILLS'. An annotation box is overlaid on the 'EDUCATION' section, containing the text 'This is an annotation'. A red arrow points from the annotation toolbar to the annotation box. The annotation toolbar, located in the bottom right corner, includes icons for 'Point', 'Area', and 'Text' annotations, as well as icons for deleting and toggling the visibility of annotations. The bottom of the interface features navigation controls for 'Previous Material' and 'Next Material', along with icons for search, zoom, and other document functions.

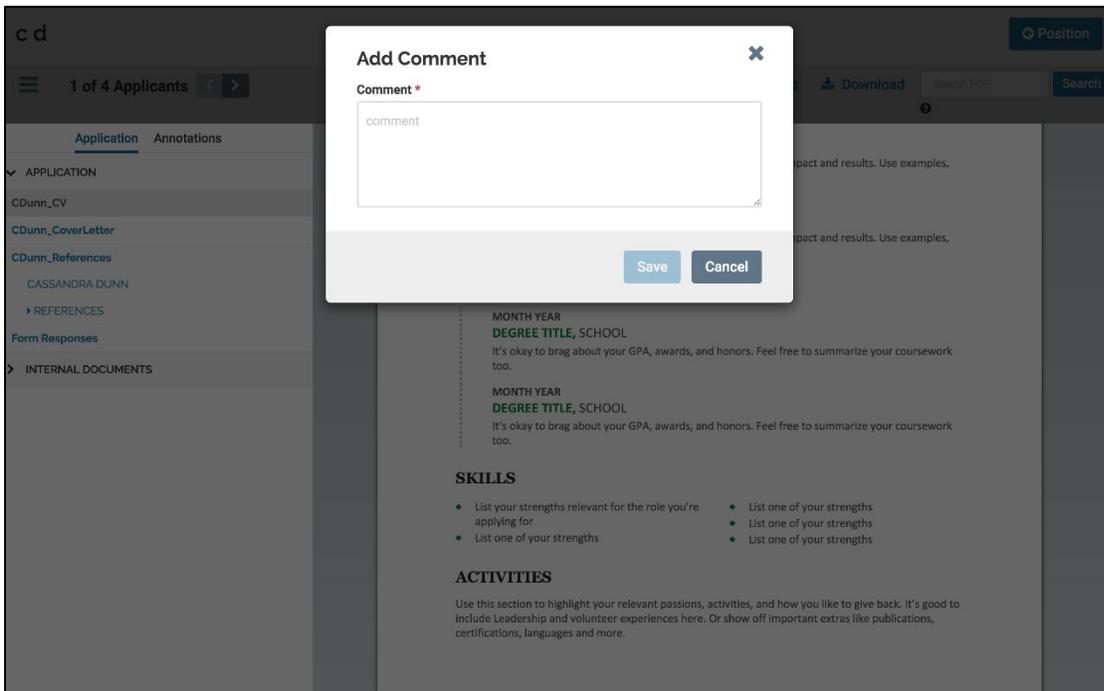
You can view a list of annotations by clicking the Annotations tab at the top of the materials list on the left hand side of the window. You can export all your annotations by clicking the export icon that appears to the right of the Annotations tab once you've made an annotation.



Commenting on an Application

After reviewing applicant materials, Evaluators can leverage the comment feature in AR to add overall commentary on an application. If the search Administrator has set up the “blind review” setting, comments and ratings (see next section) you add will not be visible to your fellow committee members, and theirs will not be visible to you. This setting can be disabled at a later point in the evaluation process to support committee discussion.

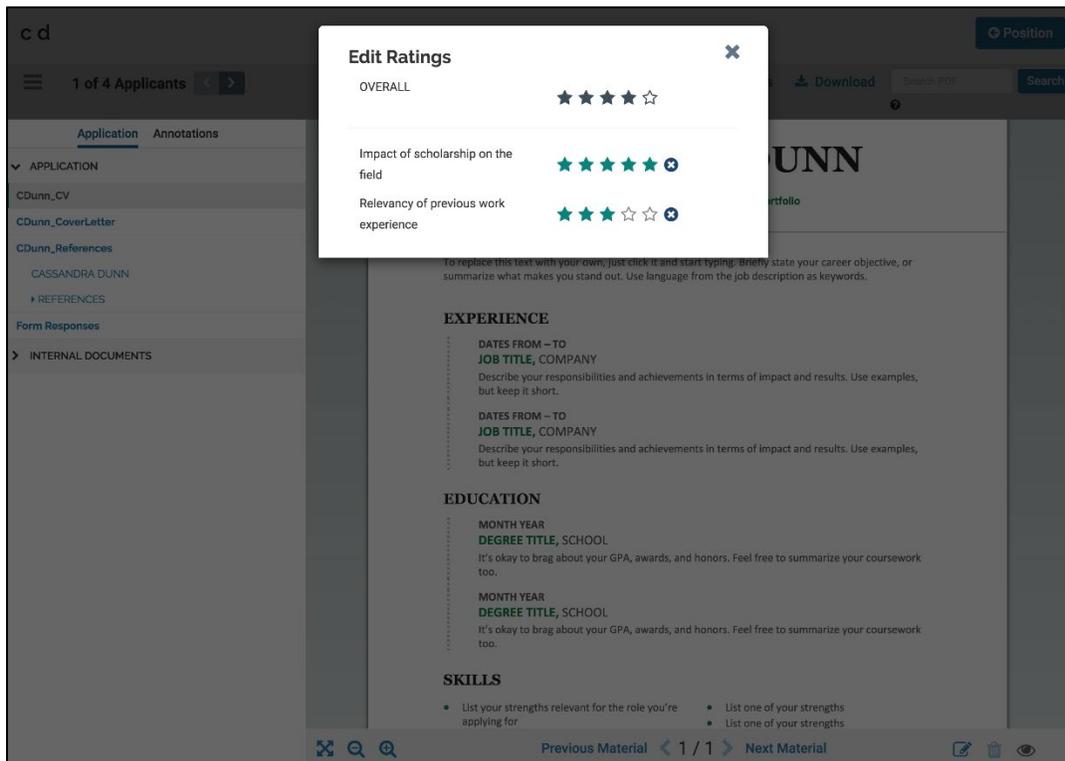
To add a comment to an application while in the Document Viewer, click the blue “Comments” link in the toolbar at the top of the screen. A popup box will appear where you can type your comment and click “Save.” You will not see your comment appear directly in the Document Viewer, but it can be accessed and edited later from the applicant’s profile.



Rating an Application

After reviewing applicant materials, Evaluators can also leverage the rating feature in AR to evaluate applicants against discrete evaluation criteria. *Note that these criteria must be set up in advance by the search Administrator based on committee specifications, and are NOT weighted.* The rating feature allows the evaluator to assign one to five stars for each criterion.

To use the AR ratings feature, click the blue “Ratings” link on the toolbar at the top of the screen. A popup box will open listing all criteria that have been set. Click on the highest number of stars you want to award for each criterion (i.e., click the fourth star to assign four stars). The system will aggregate your individual scores into an unweighted average overall rating automatically. Click the “x” in the top right to close the box when you are finished rating.



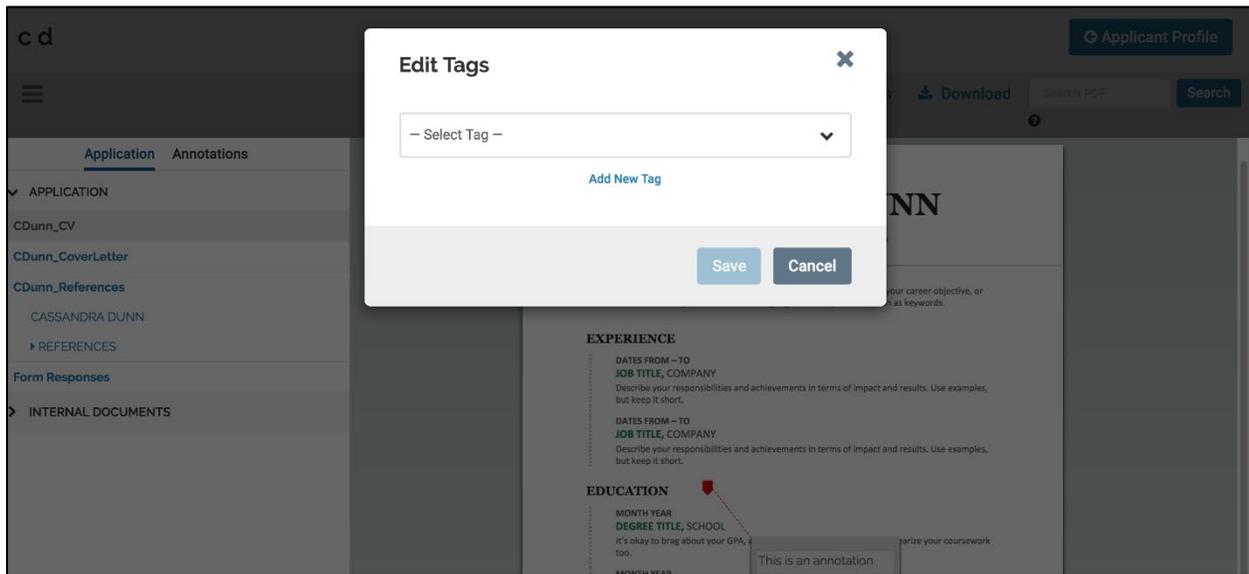
Although the AR rating tool is easy to use, it is not required. Search committees can continue to evaluate applicants outside of the system provided they follow University policy in doing so. Regardless of whether Evaluators use the rating feature or not, Administrators must be able to track the flow of the search in the module (through position and application statuses) and all applicants must receive a disposition code (i.e. reason for rejection) before the search is closed.

TIP: The system does not provide instructions on whether 1 or 5 is considered “high” in the star-based rating system. It is recommended that search committees establish this amongst themselves in advance of reviewing applicants if the rating feature will be used. An Administrator can add that note to the search for recordkeeping purposes.

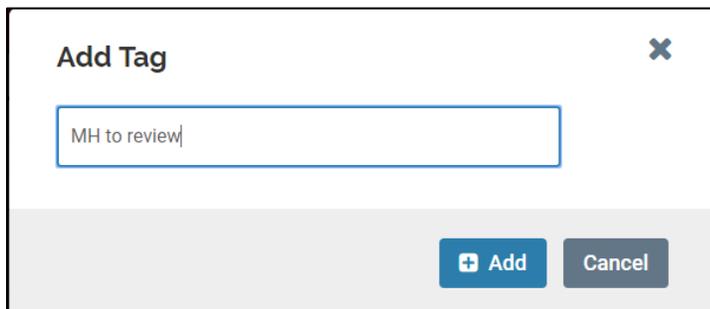
Adding Tags to an Application

There are several ways to manage the applicant pool in the AR module, one of which is via **Tags**, which are small pieces of custom metadata that can be attached to an applicant's record. Administrators can use tags to indicate which members should evaluate which applicants, for example, and Evaluators can use tags to indicate which applications they have already reviewed. **Tags are visible to the entire committee regardless of whether "blind review" has been enabled.**

To add a tag to an application while in the Document Viewer, click on the blue "Tags" link in the toolbar at the top of the screen. A popup box will open and show you the current tags on that application. If "None" is shown, click the "+" icon to open a box with a dropdown menu. Select an existing tag from the dropdown menu or click "Add New Tag."



The screen will shift to show a fill-in field. Type the tag you want to add into the field and click "+Add."



Close the box to return to the Document Viewer and continue reading.

Updating Comments and Ratings

If you would like to update a comment or rating you have made on an application, click the "Position" button in the top right corner of the Document Viewer to return to the list of applicants. Any tags and ratings you have added will appear on those applicants' records. If "blind review" has been enabled for your search, you will only see "My Overall Rating" as a column and will not see other committee members' ratings. You will see all tags that have been added in the "Tags" column, however.

To view your comments or specific ratings for an applicant without opening the Document Viewer again, click on the applicant's name. This will open their applicant profile, and you can scroll down to the bottom to see your comments and ratings.

The screenshot shows the applicant profile for 'c d' on the University of Chicago's recruitment system. The page is divided into several sections:

- Header:** University of Chicago logo and name, user name 'Melina E Hale', and navigation breadcrumbs: 'The University of Chicago > Positions > Demonstration Position for Training (DO NOT APPLY) >'.
- Left Sidebar:** Navigation menu with 'Home', 'Academic Recruitment', and 'Positions' (selected).
- Applicant Information:**
 - Name:** c d
 - Education Information:** J.D., The University of Chicago
 - Status:** n/a
 - Disposition Code:** (empty)
 - Tags:** 'MH review complete' (with delete icon) and '+ Add'.
- Application Section:** A dropdown menu labeled 'Application' with 'Complete' and 'Read' buttons.
- Documents Table:**

Title ^	Date ↕	Actions
CDunn_CoverLetter Cover Letter	May 29, 2019	Download
CDunn_CV C.V.	May 29, 2019	Download
CDunn_References Contact Reference	May 29, 2019	Download
- Forms Section:** A dropdown menu labeled 'Forms' with 'Application Agreement' (1 Question).
- Internal Documents Table:**

Title ^	Date	Actions
No internal documents have been added.		
- Ratings Section:**
 - My Ratings:**
 - Average:** 5 stars
 - Impact of scholarship on the field:** 5 stars
 - Relevancy of previous work experience:** 3 stars
- Comments Section:**
 - Comments:** A dropdown menu with '+ Add Comment' button.
 - Comment:** 'Me | Aug 26, 2019' with text 'great applicant' and 'Edit | Delete' buttons.

Footer: © 2019 Interfolio, Inc. Program Policies

Click the stars to change your ratings and the aggregate rating will update automatically. Click "+Add Comment" to add another comment, or click "Edit" to update an existing one. If the "blind review" setting is disabled, other members' comments and ratings will appear here as well.

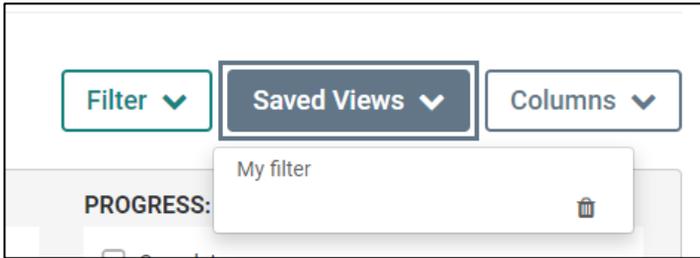
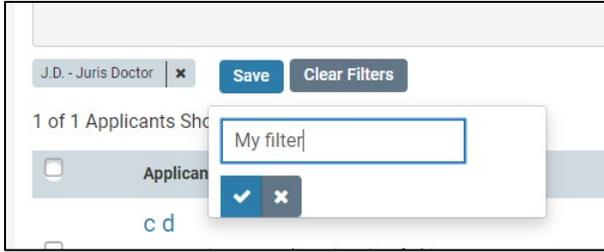
Filtering Applicants

If you have a large applicant pool, you may find it helpful to filter the pool based on tags you have added during the review process. To begin adding filters, select the **Filter** menu at the top of the applications list. A grey section will open and show a variety of ways the pool can be sorted: **Highest Degree Earned**, **Application Status**, **Tags**, **Progress**, **Ratings**, and whether the applicant has been **Archived**. The number of criteria available in these sections will be dictated by the variation in the pool and by the progress of the evaluation period for the search.

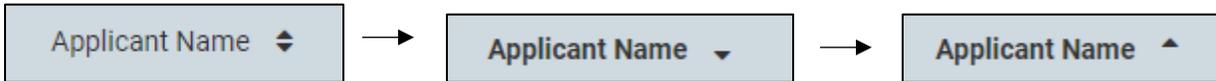
The screenshot shows the University of Chicago recruitment system interface. The top navigation bar includes the university logo and the name 'Melina E Hale'. The main header displays 'The University of Chicago > Positions >' and the title 'Demonstration Position for Training (DO NOT APPLY)'. Below the header, there is a table with columns for Unit, Status, Opens, and Closes. The 'Applicants' section features a search bar and a 'Filter' button. The filter menu is open, showing options for 'HIGHEST DEGREE EARNED', 'APPLICATION STATUS', 'TAGS', 'PROGRESS', 'RATINGS', and 'ARCHIVED'. The 'TAGS' section has a checkbox for 'MH review complete' which is currently unchecked. A 'Filter by Form Responses' button is visible at the bottom of the filter menu.

Once you have selected some criteria (e.g. a Tag indicating which ones you have reviewed), it will appear below the grey section and show a “Save” button. By clicking “Save,” typing a label for your filter, and clicking the check mark, you can retain those selections for quick access through the **Saved Views** menu in the future. Click the **Filter** button to close the grey section.

The screenshot shows the same University of Chicago recruitment system interface. The 'Filter' menu is now closed. In the 'TAGS' section, the 'MH review complete' checkbox is now checked. Below the filter menu, a 'Save' button is visible, along with a 'Clear Filters' button. The 'Filter by Form Responses' button remains at the bottom of the filter menu.

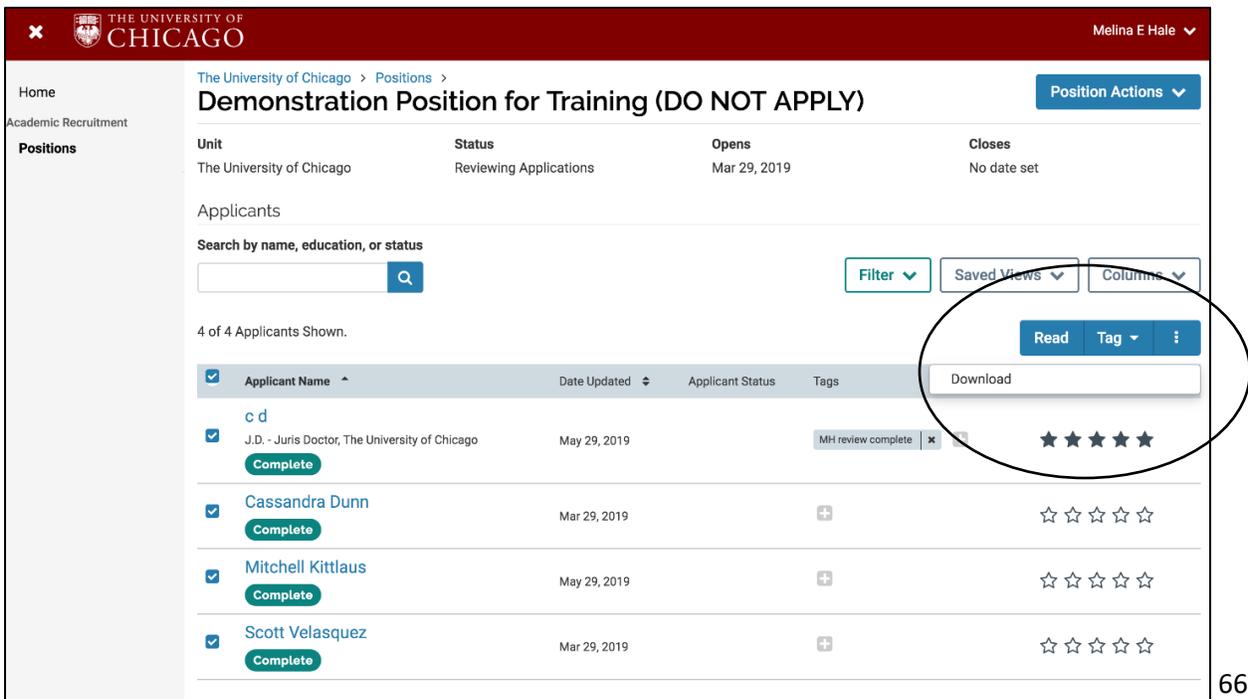


You can also sort the applicant pool according to **Applicant Name**, **Date Updated**, or other columns like **My Overall Rating**. To do this, simply click the arrows next to the column label.

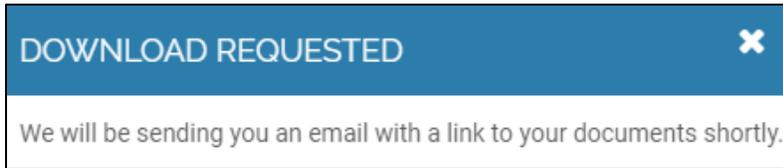


Downloading Application Materials

If you prefer to review application materials offline, you can quickly download all materials. When looking at the list of applicants, use the checkboxes to the left of each applicant to select which ones you would like to download (or use the checkbox at the top to select all). Click the “more” button (the three dots) that appears on the blue toolbar and select “Download.”



A notification that your download has been requested will appear in the bottom left of the screen.



In addition to receiving an email, your document download will be available in your Action Items through the Home tab in your dashboard (top left of the screen). It may take a minute to appear there. Applications download in a .zip file with each application collected into its own PDF.

