

# Academic Search & Recruiting

## Quick Start Guide: Unit Administrator

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## Quick Start Guide: Unit Administrator

How to Login: <http://interfolio.com>

### Sign In

#### Sign in with email

Email \*

Password \*

Sign In

[Forgot your password?](#)

#### Or sign in with:

Partner Institution

Google

To login select “Partner Institution.” This will bring you to the CU Single Sign On (SSO) page. Please login using your UNI and password. After you login, the site will take you to your Interfolio Account Dashboard.

#### **Adding Users – Evaluators, Committee Managers & Administrators:**

1. Please email the Institutional Administrator to request additional Evaluators, Committee Managers and/or Administrators for your department. For Lamont-Doherty Observatory, Manhattanville and Morningside please contact [academicrecruiting@columbia.edu](mailto:academicrecruiting@columbia.edu). For Columbia University Irving Medical Center, please contact Azeez Karim [ak2628@cumc.columbia.edu](mailto:ak2628@cumc.columbia.edu).

**No Committee Manager or Administrator will be added to the system without first taking the appropriate training in ELM for their user group. No exceptions.**

#### **Creating a New Position (typically completed by the Committee Manager but can be completed by the Unit Administrator)**

1. Select Positions from the left-hand menu.
2. Select [New Position](#) in the top right-hand corner.
3. Select the [Position Type](#) from the drop down menu.
4. Search for the [Selected Unit](#) and choose the hiring unit from the drop down.
5. Answer the question, “what kind of position would you like to create?” Select, [“A new position.”](#)
6. Click Create
7. Fill in the [Position Title](#). **NOTE:** For Open Rank positions use the following format: Open Rank: Rank 1 / Rank 2/ Rank 3)
8. Fill in the [Location Code](#) (see chart)

9. Select the [Open Date](#) (this should always be at least one day in the future. Posts auto post the day following final approvals. If the open date passes before the post is actually approved for posting, please edit the opening date again to make sure it is one day in the future from the current date).
10. Pick the appropriate [Deadline](#): Rolling (Open Until Filled) or Specific Date (Specify End Date)
11. Complete the [Position Description](#) section (this section is mandatory)
12. Complete the [Qualifications](#) section (minimum degrees, etc., this section is mandatory)
13. Optional, complete [Application Instructions](#).
14. The EEO statement is prefilled. Do not add an additional EEO statement.
15. Click Save and Continue
16. [Required Documents](#). **All applicants must provide a CV.** Please ensure that CV is listed as a required document. Select any additional required documents by selecting Add Requirement. Select the document type from the drop down list. Select the number of documents of the selected type required. Save. Repeat this process as many times as needed to add all required documents. If you want to add optional documents click the checkbox next to this item in the Additional Applicant Options section. NOTE: It is important to add all required documents during post creation so that the posting accurately tells applicants what they need to upload to apply. Interfolio accepts Word, PDF, video, audio, picture and multimedia files.
17. Click Save and Continue.
18. [Evaluation Settings](#) are objective criteria used to evaluate the applicant pool such as scholarship, teaching experience, research, etc. Evaluators will be able to rank candidates on this criteria on a 1-5 star ranking. To add a criterion, click on "Add Criterion." Add all evaluation criteria. Click Save and Continue. Evaluation criteria must be added during post drafting. Once a post is live you will not be able to add or edit this section.
19. [Application Forms](#) are supplemental questions that you would like your applicants to answer. Be mindful that you cannot ask any questions regarding an applicants' membership in a protected class. Examples of questions to ask are what is your area of specialization (open ended question), will your Ph.D. or equivalent degree be confirmed by July 1, 2022 (yes or no question), where did you hear about our position opening? (open-ended question), etc. Do Not Add an Additional EEO form. Click Save and Continue or Skip Step.
20. Add [Search Committee](#) members by selecting "Add member." Search Committee members in Interfolio are known as Evaluators (during the applicant review process).
21. Add a Committee Manager by selecting "Add Manager." Note, the Committee Manager is the administrative user who will be assisting the search committee with the search. Previously known as the Department Admin. Click Save and Continue. The individual creating the draft posting should list themselves as the Committee Manager (even if they are a Unit Administrator).
22. In the Internal Notes section, you may leave [Position ID or Requisition Number](#), [Rank](#) and [Title](#) blank.
23. Complete the [Discipline Field](#) (optional).
24. Select the appropriate [Appointment Type](#) from the drop down. Your options are Continuous, Fixed, Tenure Track and Tenured. A continuous term is a position that has no end date (a permanent role). A fixed term position has a start and end date. The Tenure track and Tenured drop down options should not be used; instead use the Continuous option.
25. Next select the [Position Term Length](#) by selecting the appropriate number of months from the drop down. A one year appointment would be 12 months, a one semester appointment would be 6 months (For example, July 1, 2021 to December 31, 2021). Pick the number of months that most closely aligns with the length of the fixed term without being shorter than the actual term worked. (For example, if the term is 4.5 months, select 5 months. If the term is 4.25 months, select 5 months).
26. Select the [Anticipated Start Date](#).
27. Salary Range or Pay Grade and Funding Source may be left blank.

28. In the [Hiring Plan](#) section of the Internal Notes, please provide the external advertisement information for two sources. Make sure to include the name of the job board, the general website, and the start and end dates of the external advertising. For example, The Chronicle of Higher Education, [www.chronicle.com](http://www.chronicle.com), posted February 15, 2021 to April 30, 2021. Posting the text of the advertisement is not necessary as it should be the same as the position posted on careers at Columbia. You may truncate your advertisement as long as you include the EEO statement and the link to apply via the Columbia Interfolio site.
29. In the [General Notes](#) section of the Internal Notes, indicate the Anticipated End Date. Use this format: [06/30/2022](#). Only place the date in numerical form in this field. If this is a continuous position, leave this field blank.
30. Click Save and Continue.
31. You will now see a complete draft of your posting. Please review for spelling errors, broken links, incorrect dates and incorrect position titles. If you are happy with your draft posting, click on [Submit for Approval](#) on the review page. As the Unit Administrator, you will still need to review and approve the draft posting. Changes to posts will be captured by the system logs and are subject to review.
32. Once the position is approved, make sure to edit the open date to one day in the future, if you've already passed the opening date the Committee Manager indicated. The post will go live the next day.

### **Creating from a Previously Posted Position (Cloning)**

Follow steps 1-4 from above.

- Answer the question, what kind of position would you like to create? Select "Clone from an existing position"
- If cloning from an existing position, select that option and a drop down will appear, select the position you want to clone from the drop down.
- Resume following the directions above starting at step 6 in the **Creating a New Position**
- Review the [Position Title](#) (make the appropriate edits so that the title reflects the new position, not the cloned position)
- Be sure to review all the information in the post to ensure it is up to date and accurate.

### **Approving the Draft Position**

1. When the Unit Administrator logs into their Home Page, they will see a list of Tasks awaiting them.
2. Select the position that needs review from the list on the Tasks page.
3. Please review the draft position looking for errors, broken hyperlinks and inaccurate descriptions of the role. Make sure that instructions to the applicant are clear and concise. If corrections need to be made to the posting please return the draft to your Committee Manager by selecting "[Send Back](#)" on the approval screen. When you "[Send Position Back](#)" you will have the opportunity to include a note about the changes that need to be made in order to get the position approved. The Committee Manager should make the indicated updates by selecting "Edit Position." Once editing is complete, the Committee Manager can select "Return to Approver" to return the edited position to the Unit Administrator for final approval.
4. The Unit Administrator should review all three tabs: [Position Details](#), [Applicant Review Details](#) and [Internal Information](#). If no edits need to be made, navigate to the Position Details tab and review the "[Open Date](#)." **Change the "Open Date" to one day in the future.** For example, if the "Open Date" says March 24, 2021 and it is currently March 24, 2021 edit the "Open Date" to indicate March 25, 2021.
5. Then select "[Approve](#)."

6. Unit Administrator Approval is the final step in the approval process. Once the Unit Administrator approves the draft post by clicking “Send,” the Committee Manager will receive an email notifying them that the position is ready to publish and will start accepting applications on the open date. Once the posting is published, the Committee Manager (or the Unit Administrator) should change the position status to “Accepting Applications.” For more details or screenshots see “The Posting Checklist Video” or refer to “Changing the Position Status” below.

### **Adding Tags to Applications**

1. Please create a tag using the format: “Diversity Advocate – UNI of Diversity Advocate” after the position is posted and once applicants begin applying.
2. Select [Positions](#) in the left menu, a list of positions will appear.
3. Click on the title of the desired position.
4. You will see the applicant list.
5. Select the [checkbox](#) to the left of the Applicant Name Header. A menu bar will appear at the start of the applicant list, on the right side.
6. Select [Tag](#) from the blue menu bar above the applicant list
7. Select Add new tag and enter Diversity Advocate - [UNI] and click Add.
8. You will see the Diversity Avocate tag has been added to the tags for the applicant.

**Tags are only to be used for identifying the diversity advocate. Tags are searchable and reportable.**

### **Changing the Position Status**

1. Select [Positions](#) in the left menu, a list of positions will appear.
2. Click the title of the position whose position status you want to change
3. Under the word “Status” you will see the current status of the position. Select “Change.” A drop down will appear, select the appropriate option.
4. A popup window will ask you to confirm that you want to change the current status to the one that you indicated. It will also indicate what actions applicants and evaluators can and cannot take. Do not select “Send a message to all applicants with this change.” Select [Confirm](#).

### **Changing an Applicant’s Status / Moving Applicants through the Workflow**

1. Select [Positions](#) in the left menu, a list of positions will appear.
2. Click the title of the position whose applicants you want to move through the workflow.
3. Select the [checkbox](#) to the left of the applicants name.
4. Select Status from the blue menu bar right above the applicant list
5. Pick the appropriate status for the selected applicant(s)
  - a. The same status will apply to all selected applicants.
6. A popup window will ask you to confirm this applicant status change
7. Click [Save](#).

### **Using Disposition Codes**

Disposition codes are meant to work in conjunction with application statuses rather than replace them outright. Disposition codes have been predetermined by the Institutional Administrators. When moving applicants through the applicant workflow. To use:

1. Select the applicant from the list of applicants by clicking their name.
2. Under [Disposition Code](#) (located under Education Information), select Add.
3. Select the disposition code from the dropdown list.

To assign the same code to multiple applicants

1. Check the box to the left of each applicant's name in the applicant list.
2. Select [Disposition Code](#) from the blue menu right above the applicant list.
3. Select the appropriate disposition code from the list.

**\*\*Make sure to also change the applicants' status as well. For example, the applicant status may be "No Longer Considering" and the disposition code would be "Does not meet minimum qualifications."**

### **Identifying a Selectee**

1. Select the applicant from the list of applicants by clicking the box to the left of their name.
2. If the title of position will be the title the selectee will assume, choose "Selectee" from the "Status" dropdown
3. If this is an open rank position, choose [Selectee – \[rank\]](#) where rank is the rank that the chosen selectee will receive AA clearance on and be hired as; for example, Selectee – Associate Professor.
4. Wait for the AA clearance to run at 10:00am, 4:00pm or Midnight.
5. If all of the trigger conditions are met (see the Affirmative Action Clearance section below), when the selectee is approved for AA clearance their status will automatically shift to "AA Cleared" and an [EEO Note](#) will be attached to the position. An AA Cleared email will be sent to the Committee Manager. The EEO Note attached to the position will include: First Name and Last Name of the Selectee, Clearance Date, Posting Number, Position Title, Hiring Unit, Approved By, and a time and date stamp, and Rank (only for open rank positions).

### **Automatic Affirmative Action Clearance**

Affirmative Action Clearance is a passive process. At 10:00am, 4:00pm and 12 midnight EST the system will check to see if any applicants have been moved to any of the selectee applicant status options. The system will then check to see if the posting has been an active recruitment for 30 days, at least one search committee member is listed, there are at least five applicants in the applicant pool (LDEO, Manhattanville and Morningside; three for CUIMC) and that at least two recruitment sources are listed in the Hiring Notes section of the post. If all of these conditions are met, the post will return an EEO note that provides the First Name and Last Name of the Selectee, Clearance Date, Posting Number, Position Title, Hiring Unit, Approved By, and a time and date stamp, and Rank (only for open rank positions).

Each time a selectee is chosen this process will be repeated and the preceding information will be added to the EEO note for each successive selectee.

**NOTE: You cannot provide an offer letter to the candidate before Affirmative Action clearance has been awarded. This action is strictly prohibited.**

### **Emailing Applicants their Final Applicant Status**

Once you have moved applicants to the final status of "No Longer Being Considered" and choose the applicable disposition code (See the [Changing an Applicants' Status](#) and [Using Disposition Codes](#) sections above for step-by-step instructions), to email applicants their final non-selected applicant status update:

1. Select the checkbox to the left of the applicable applicants.

2. Click Email
3. Click the [Select a Message Template](#)
4. To preview the message before sending, select [Preview](#).
5. To send the message, select [Send](#).
6. A message sent popup will appear in the bottom left corner of your screen confirming that you sent the selected applicants an email.

### **Closing a Position (Filling the Post)**

1. Select Position in the left menu, a list of positions should appear.
2. Click the [Title of the position](#) that you want to close.
3. Update the [Position Status](#) to Position Filled
4. Select "[Position Actions](#)" in the top right-hand corner.
5. Select "[Close Position](#)" from the dropdown menu.
6. Indicate whether or not an applicant was selected to fill the position.
7. If no selection was made, select "No" and provide a brief note explaining why, then select "[Close Position.](#)"
8. If one or more applicants were selected, select "Yes" and click "[Add Applicant.](#)"
9. Select the appropriate applicant from the list of applicants by clicking "[Add](#)" in the far right column in the row containing the [AA Cleared Applicants'](#) name.
10. Select Close.
11. Select "[Close Position.](#)"

## **Definitions**

### **Application Forms** (Formerly known as supplemental questions)

Administrators can collect additional information (such as "How did you hear about this position? or "What is your area of speciality?") by creating custom application forms. Once created, Administrators can add the forms to new or existing positions within their Interfolio account. It is important to note that once a form has been created, questions on that form can no longer be edited.

### **Disposition Codes**

Disposition Codes are short, pre-defined explanations of why an applicant did not make it to the next step of the hiring process. They help track and document committee decisions regarding each applicant, providing responsible documentation of the hiring process and mitigating liability by keeping a record of the stated reasons why each individual job applicant was removed from consideration. These are the allowable Disposition Codes

- Candidate Declined Job Offer
- Candidate's Qualifications for the Position Insufficient Relative to Other Candidates'
- Does not Meet Minimum Qualifications
- Does Not Meet Preferred Qualifications relative to Other Candidates
- Failed to Show for Interview
- Interview Revealed Lack of Interest and/or Enthusiasm for the Job
- Interview Revealed Work Experience or Skills Do Not Meet Job Requirements
- Job Opening Canceled
- Lack of external funding
- Less competitive based education or training

- Less competitive based on work history or experience
- Not Best Match Relevant to Finalist
- Poor Communication or Interpersonal Skills
- Position Withdrawn
- Research Expertise or Area Not a Match
- Unsuccessful Job Talk / Presentation
- Unverifiable References

**Location Code**

The following are the allowable Location Codes. **Type in the Location Code number**, for example, 01, for Morningside. The location will appear as a text word, Morningside, on the Job Board.

<b>01</b>	<b>Morningside</b>
<b>02</b>	<b>Columbia University Irving Medical Center</b>
<b>04</b>	<b>Lamont-Doherty Earth Observatory</b>
<b>05</b>	<b>Nevis</b>
<b>06</b>	<b>Manhattanville</b>
<b>70</b>	<b>Other</b>

**Message Templates (message templates are set by the Institutional Administrator).**

**Statuses (you do not have the ability to edit statuses, you must choose from the statuses provided in the dropdown)**

- **Position** statuses indicate where a position is within the search process. Some common position statuses are "Accepting Applications," and "Reviewing Applications."
- **Application** statuses are applied to individual applicants to indicate where their application is within the search process; for instance, you might use "Rejected," "Longlist," or "Shortlist" as possible application statuses. Application Status permissions will override position statuses. For example, the current position status might not allow for applicants to update their materials, but the application status could override that permission to let an individual or a subset of applicants update materials.