

Guide to Managing Searches in the Faculty Recruiting System (FRS)

Last updated 7/9/2021

This guide is intended to help Feinberg School of Medicine (FSM) users manage faculty searches in the Faculty Recruiting System (FRS). The content applies when the following conditions are met:

1. The search status is not pre-active in FRS (typically this guide is used with searches having **active** or **hold** status)
2. You have any of the following roles for a given search:
 - **Search Administrator**
 - **myHR Search Committee Member** (only faculty have this role)
 - **Additional Search Committee Member/Administrator**

Note: The permissions of myHR search committee members and additional search committee members/administrators are customized by the Search Administrator, so dependent on Search Administrator configuration choices, other roles may not have access to all of the features described in this guide.

Expectations for Faculty Use of FRS

Faculty on the myHR search committee automatically have access to FRS to see applications but are not required to use the system unless that is the preference of department/search committee leadership. Feinberg expects administrators to be the primary users of FRS, but at the outset of a search, administrators can work with their search chair/committee to consider whether it is useful for the search committee to interact with FRS as well.

FRS Search Management Checklist
Required Tasks
<ul style="list-style-type: none"> <input type="checkbox"/> Insert the FRS online job application link into the ad (see SECTION 2) Note: Departments are responsible for executing the search strategy approved on the pre-search form <input type="checkbox"/> Monitor receipt of applications (see SECTION 3) Important: FRS does not send email notifications when a new application is received, so someone must regularly check FRS for new applications to each search. <input type="checkbox"/> Download applications to distribute to search chair/search committee members (see SECTION 4), This is necessary if the search committee is not using FRS. <input type="checkbox"/> Designate candidates as finalists (see SECTION 10) <input type="checkbox"/> Enter final disposition codes (see SECTION 11) <input type="checkbox"/> Download the Search Summary Report (see SECTION 13) <input type="checkbox"/> Offer approval through FSM business plan database Important: After a finalist is identified in FRS, use the FSM business plan database to complete the offer approval process before extending an offer to a candidate.
Recommended Additional Features
<ul style="list-style-type: none"> <input type="checkbox"/> Track applicant status / manage review process (see SECTION 6) <input type="checkbox"/> Select applicants and perform bulk actions (see SECTION 7) <input type="checkbox"/> Create custom tags to categorize or track applicants (see SECTION 25)

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Essential Faculty Recruiting System (FRS) Features

The initial section of this guide covers the aspects of the Faculty Recruiting System that users are required to use or are likely to need in order to manage the search.

1. Log in to FRS / Troubleshoot Login or Access Issues

Log in to FRS (<https://facultyrecruiting.northwestern.edu>) with your netID and password. You will be required to establish multi-factor authentication (MFA) to log in, which is separate from the MFA instance used to log in to Northwestern University's myHR system.

Troubleshoot Login or Access Issues

1. I can't log in

- a. The most likely reason is that you have not been given access to a search in FRS. You will not be able to log in to the FRS system before you are granted access to at least one search.
- b. Make sure that you are logging in with your university netID and password (not a hospital ID).

2. I can't find a specific search after successfully logging in

- a. Searches go through several levels of review before they become visible in FRS. The search you are looking for may not have been approved for entry into FRS yet. Contact your department administrator if you need an update.
- b. The department administrator who manages access to that search may not have given you access yet. Search access is managed separately for each search, and an authorized administrator must grant you access. Contact your department administrator.

3. I can't see some of the features described in this guide OR

I don't have access to the same features across all my searches in FRS

- a. The features you have access to are defined by your FRS role for each search. You might have different roles for different searches, meaning your permissions and access would be different across searches.
- b. If you are assigned to the role of "Search Administrator" for a particular search, you have access to all the features described in this guide for that search. (All Department Administrators are given Search Administrator access and can grant that access to others.) If you are not listed as a Search Administrator for a particular search, then you have access as a search committee member or additional administrator and the Search Administrator has customized your permissions, possibly restricting what you can see and do.

2. Insert the FRS Online Job Application Link into the Ad and Distribute to the Search Committee

Note: Departments are responsible for executing the search strategy they proposed on the pre-search form and must include the link to the FRS online job application in the ad.

1. Log in to FRS (<https://facultyrecruiting.northwestern.edu>) with your netID and password. If you experience login problems, consult [SECTION 1](#) of this guide.

- You will land on the **Dashboard** screen. Configure your dashboard to display **Active** searches if they do not already display ([SECTION 22](#)). Active searches are approved by the Provost, posted on the NU Careers website, and have an active application link through which applicants can apply.

Note: Your ad is automatically posted to the NU Careers website and the [Greater Chicago Midwest Higher Education Recruitment Consortium](#) (GCM HERC) job board. NU does not automatically post to sites like Monster and Indeed, but you may find your ad on these sites which aggregate job postings picked up by their own internet search engines.

- Click on the **Title** of the search, which will open the **Overview** screen for that search.
- In the **Search Details** panel, confirm that the status is **Active** (otherwise the link won't work). Then copy the **Application URL** and paste it into any advertisements you place in journals, online job boards, or other job posting venues.
- Double check to make sure you have posted the correct application link in the ad (especially important if you have multiple open searches, or if you are recycling a prior ad—update that link!).
- Distribute the ad with the correct FRS link to the search committee chair/members** so they can refer applicants to it. It is highly recommended that you provide the committee the full ad. Faculty could be serving on multiple search committees at the same time, so if you provide the FRS link only, there is a greater likelihood that they will confuse which FRS link belongs to which search.

3. Navigate to Applications / Open an Application

Note: FRS does not send email notifications when a new application is received, so you need to regularly check FRS for new applications to each search.

- Log in to FRS (<https://facultyrecruiting.northwestern.edu>) with your netID and password. If you experience login problems, consult [SECTION 1](#) of this guide.
- You will land on the **Dashboard** screen. Configure your dashboard to display **Active** searches if they do not already display ([SECTION 22](#)). “Active” searches are approved by the Provost, posted on the NU Careers website, and have an active application link through which applicants can apply.

The dashboard includes columns that show you the number of applications submitted for each of your searches. To display or hide these columns, see [SECTION 22](#) on configuring the dashboard.

- Submitted:** Total number of applications submitted for each search
- 7-Day:** Number of applications submitted in the last 7 days
- Today:** Number of applications submitted today

Status	HR Job ID	Title	Department	Submitted	7-Day	Today	Reviewed by You
Active	34759	Academic Dermatologist	MED-Dermatology	23	0	0	0
Active	34414	Academic General Pediatrics and Medical Director of Clark Deming Practice	MED-Pediatrics	4	0	0	0
Active	33685	Academic Gynecologic and Perinatal Pathologist	MED-Pathology	6	0	0	0

3. Click on the **Title** of the search you want to view. New options will appear in the top navigation bar, and you will find yourself in the **Overview** tab. A series of boxes provides counts of applications in certain statuses (note: these boxes look like buttons, but clicking them performs no action). The boxes colored in purple show the same counts you saw on the dashboard for the search selected:
 - a. **Submitted**: Total number of applications submitted for this search
 - b. **7-day**: Number of applications submitted in the last 7 days
 - c. **Today**: Number of applications submitted today



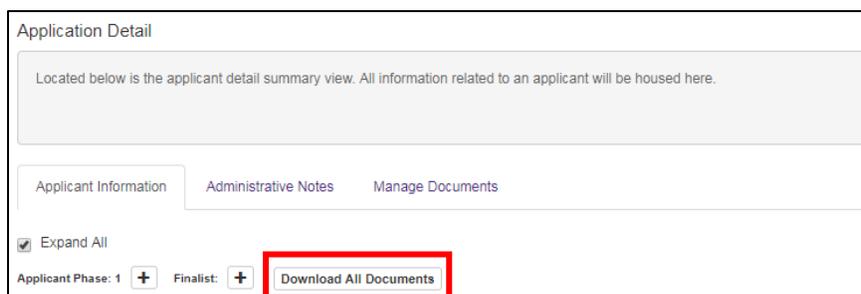
4. Click the **Applications** tab in the top navigation bar. This opens the **Applications Summary** screen that contains the list of applicants. To customize the columns that display, see [SECTION 23](#), and to filter the application list, see [SECTION 24](#).
5. By default, there are three tabs on the page: All Applicants, Phase 1, and Finalists. The All Applicants tab contains everyone who has applied to the search. The other phase tabs contain the names of individuals who are currently in that search phase (see [SECTION 8](#), [SECTION 9](#), and [SECTION 10](#) on phases).

Note: Within tabs, a maximum of 25 individuals display on a page, so you will need to scroll through multiple pages to see everyone if there are more than 25 applicants listed.

6. Click the **name** of an applicant to open that application.

4. Download an Applicant's Materials for Distribution to the Search Committee

1. Open an application (see [SECTION 3](#)).
2. Make sure you are in the **Applicant Information** tab and click **Download All Documents** near the top of the screen. This will download a single PDF containing all documents submitted by the candidate. Within the PDF file, documents appear in the same order that they were listed on the application when applicants uploaded files.



3. If you need to download individual documents rather than downloading all documents in a single PDF, scroll down in the page until you get to the section called **Application Documents**. Click on one of the documents to select it (the row will turn blue). Then press the **View File** button to open/download that single file.

Application Documents			
Name	Document Type	Size	Created
a. CV.pdf	Curriculum Vitae	85 KB	2018-04-19 10:14:19
a. cover letter.pdf	Cover Letter	24 KB	2018-04-19 10:14:19

5. Update Materials for an Applicant

After submitting an application, applicants can no longer access the application to make revisions. However, administrators can add documents or update a completed application form:

1. Open the candidate's application (see [SECTION 3](#)).
2. Click on the **Manage Documents** tab. From here you can replace existing documents or add documents that were optional for the candidate in the application form.
3. If there is need to correct info the applicant provided in the online application form (e.g., the candidate has a new email address since applying), you can edit the data entered in the form fields:
 - a. Go to the **Applicant Information** tab.
 - b. The data in the panels for **Official Contact Information** and **Academic Information** can be edited by clicking the pencil icon in the upper right corner of each panel.

6. Track Applicant Status / Manage Review Process

FRS offers multiple mechanisms for tracking applicant status. The use of any of these mechanisms—by itself or in combination with others—is optional, but it is highly recommended that the individual monitoring receipt of applications and managing the search in FRS select one of these and use it consistently throughout the search to make sure that new applications are not overlooked in the review process.

You can manage the search using:

- Search phases (see [SECTION 8](#) and [SECTION 9](#))
- Disposition codes (see [SECTION 11](#))
- Custom tags ([SECTION 25](#))
- Assign to reviewer ([SECTION 26](#))

These actions can be performed in bulk (see [SECTION 7](#)).

7. Select Applicants & Perform Bulk Actions

When managing the search, there are certain actions that you are required to complete (e.g., dispositioning applicants, designating finalists) and other optional actions that you may wish to complete to help you manage the search (e.g., assign applications to reviewers, apply custom tags). To improve efficiency, you can perform an action for multiple applicants at the same time by using the Bulk Actions feature. This feature only becomes enabled after selecting at least one applicant:

1. Navigate to the **Applications Summary** screen for a search (see [SECTION 3](#)).

2. Click the tab containing the list of applicants you want to work with (e.g., All Applicants, Phase 1, Finalist, etc.)
3. There are multiple ways to select applicants. Regardless of which method you use, the **Select Multiple** dropdown field will display the count of your selections.

- a. **Select Individually**

Select applicants individually by clicking the checkboxes to the left of their names

- b. **Select All Applicants (within a tab that meet filter conditions)**

Within a tab (All Applicants, Phase 1, Finalist, etc.), select all applicants by either:

- i. Clicking the checkbox at the top of the checkbox column **OR**
- ii. Clicking on the **Select Multiple** dropdown list and then choosing **Select All**

After selecting all, you can individually de-select some applicants using the checkbox to the left of their name, if you wish to select almost everybody and exclude just a few for the action you need to take.

If you applied filters (see [SECTION 24](#)), then “Select All” gets all the applicants within the tab who meet the filter conditions. FRS only displays 25 applicants per page, so “Select All” obtains all individuals across all pages (e.g., if you are in the All Applicants tab and there are 100 applicants, “Select All” obtains 100 applicants, not just the 25 visible on your page).

- c. **Select All Applicants on Current Page (25 maximum)**

If you are in a tab (All Applicants, Phase 1, Finalist, etc.) that has more than 25 applicants (meaning that they display across multiple pages), and you wish to select only the applicants visible to you, then click on the **Select Multiple** dropdown and choose **Select All on Current Page**.

4. After selecting at least one applicant, the **Bulk Actions** dropdown list will become active, and you can select an action to perform on the selected applicants. For more information on these bulk actions, refer to the corresponding section listed below.

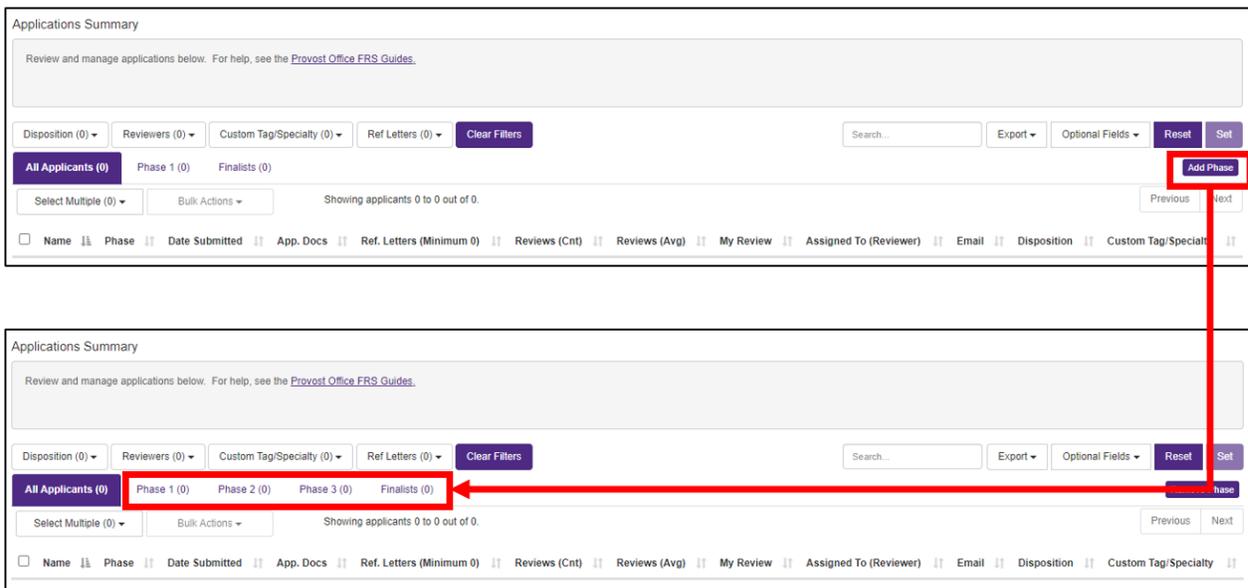
Bulk Action	Learn Details
Change Disposition	SECTION 11
Assign To (Reviewer)	SECTION 26
Set Custom Tag/Specialty	SECTION 25
Copy to Another Search	SECTION 14
Move to Phase/Finalist	SECTION 9 & SECTION 10
Send eOffer – this action is only performed by the Dean’s Office	N/A

8. Add Search Phases

1. After navigating to a search and clicking the **Applications** tab from the top navigation bar (see [SECTION 3](#)), you will see a list of the applicants to this search, grouped into tabs.

Each search automatically has three tabs:

- a. **All Applicants:** Lists everyone who submitted an application. Applicants appear in this tab even if they have advanced to a subsequent search phase. Within the All Applicants tab, a Phase column indicates the applicant's current search phase.
 - b. **Phase 1:** Lists the applicants who advanced to Phase 1 of the search and did not move beyond it (applicants will disappear from the Phase 1 tab when they are moved to another phase).
 - c. **Finalists:** Lists the applicants who advanced to the final phase of the search. All applicants interviewed should be designated as finalists, though if your search includes multiple rounds of interviews, it is acceptable to use the finalist tab for only your last round of interviews (assuming there is more than 1 individual in the last round).
2. You may create **up to two** more phases by clicking the **Add Phase** button at the right of the screen. Each click of the button adds one phase, creating new tabs on your screen.



3. The use of additional phases is optional, but can help you manage the search process.
- a. **All Applicants:** Lists everyone who submitted an application.
 - b. **Phase 1:** Lists everyone advanced to phase 1.
 - c. **Phase 2:** Lists everyone advanced to phase 2.
 - d. **Phase 3:** Lists everyone advanced to phase 3.
 - e. **Finalists:** Lists everyone advanced to the finalist phase.

The “All Applicants” tab always contains all applicants to a search, even those who have advanced to a subsequent phase. The other phases can be defined in whatever way is meaningful for your search. For example, the phases could mean:

- Phase 1: All applicants whose CVs were forwarded to the search committee for review
- Phase 2: All applicants screened by phone
- Phase 3: All applicants invited for a first round interview
- Finalists: All applicants invited for a second round interview

A search with few applicants might not need so many phases, so another search process might be:

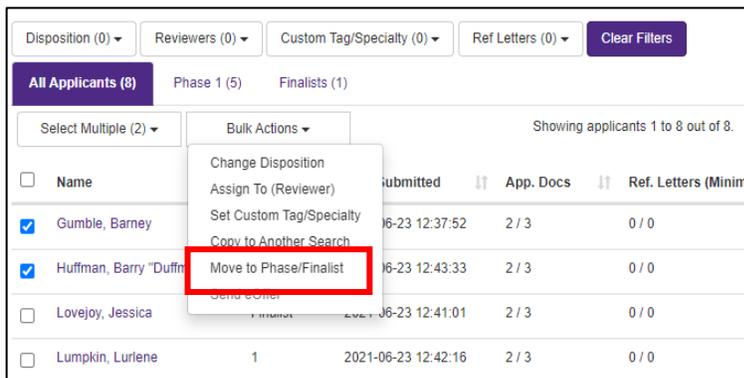
- Phase 1: All applicants screened by phone
- Finalists: All applicants invited for an interview

Note: New as of July 2021, applicants are removed from a phase when they are moved forward or backward to a new phase (unless the original tab from which they are moved is All Applicants). Each phase tab contains only the individuals currently assigned to that phase.

9. Move Applicants to a Different Search Phase

Move One or More Applicants Simultaneously to a Different Search Phase via Bulk Actions

1. Navigate to the **Applications Summary** screen for a search (see [SECTION 3](#)).
2. Click the tab containing the list of applicants you want to work with (e.g., All Applicants, Phase 1, Finalist, etc.)
3. Select one or more applicants using either the individual checkboxes to the left of applicant names, or the **Select Multiple** field above the applicant list (see [SECTION 7](#) for more info on selecting applicants).
4. Click on the **Bulk Actions** dropdown and select **Move to Phase/Finalist**.



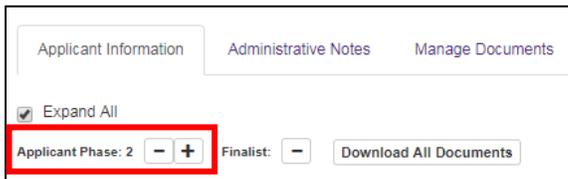
5. In the window that opens, select either **Advance to Next Phase** or **Move to Previous Phase** to move the applicant forward or backward one phase. Then press **Save**. You will find the applicants in the new phase tab to which you moved them.

Known Issue: Applicants in Phase 1 cannot be moved backwards out of that phase.

Change Search Phase for Individual Applicant via Applicant Information Screen

You can also move an applicant to a different phase within the context of reviewing their individual application:

1. Open an application (see [SECTION 3](#)).
2. Make sure you are in the **Applicant Information** tab and locate the **Applicant Phase** field:
 - a. **Number:** The number tells you which search phase the applicant is in.
 - b. **Minus sign:** Press the minus button to move a candidate back to the prior phase (this button only appears if there is a lower phase).
 - c. **Plus sign:** Press the plus button to advance a candidate to the next phase (this button only appears if there is a higher phase).



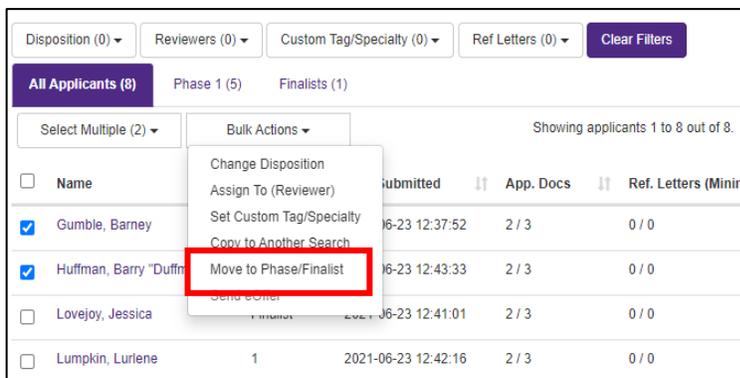
3. Navigate back to the **Applications** tab in the top navigation bar. The phase tabs produce a list of the applicants in each phase. If you advanced an applicant to Phase 2, you should now see the applicant in the Phase 2 tab.

10. Move Applicant to/from Finalist Phase (i.e., Designate an Applicant as a Finalist)

Note: The finalists you designate in FRS will automatically populate into the Search Summary Form produced at the end of the search.

Move One or More Applicants Simultaneously to/from the Finalist Phase via Bulk Actions

1. Navigate to the **Applications Summary** screen for a search (see [SECTION 3](#)).
2. Click the tab containing the list of applicants you want to work with (e.g., All Applicants, Phase 1, Finalist, etc.)
3. Select one or more applicants using either the individual checkboxes to the left of applicant names, or the **Select Multiple** field above the applicant list (see [SECTION 7](#) for more info on selecting applicants).
4. Click on the **Bulk Actions** dropdown and select **Move to Phase/Finalist**.



5. In the window that opens, select either **Mark as Finalist** or **Unmark as Finalist**. Then press **Save**. You will find the applicant(s) added to or removed from the **Finalists** tab, in accordance with your selection.

Note: It is not necessary to advance an applicant through all phases of your search to designate them as a finalist. If your search has 3 phases, but you know upon receipt of application that an individual will be a finalist, you can mark them as a finalist using the steps above without needing to advance them through each search phase. Similarly, all searches have a Phase 1 tab, but if you don't need that phase, you can move applicants from the All Applicants tab to the Finalists tab and ignore Phase 1.

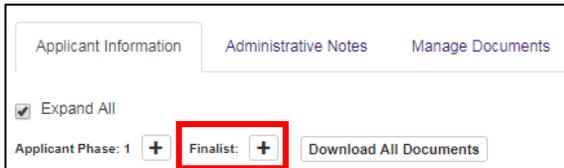
Mark or Unmark an Individual Applicant as a Finalist via the Applicant Information Screen

You can also mark or unmark an applicant as a finalist within the context of reviewing their individual application:

1. Open an application (see [SECTION 3](#)).
2. Make sure you are in the **Applicant Information** tab. Find the **Finalist** field and click the **plus sign**. It will turn into a minus sign, which means the candidate is a finalist. To remove the finalist designation from the candidate, press the minus sign to turn it back into a plus sign.

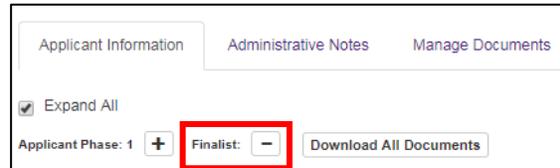
*Note: Yes, this is counterintuitive! A **minus sign** means the candidate is currently a finalist.*

Before (not a finalist)



The screenshot shows the 'Applicant Information' tab selected. At the bottom, there is a 'Finalist' field with a plus sign (+) next to it, indicating the applicant is not yet a finalist. Other fields include 'Applicant Phase: 1' with a plus sign and a 'Download All Documents' button.

After (is a finalist)



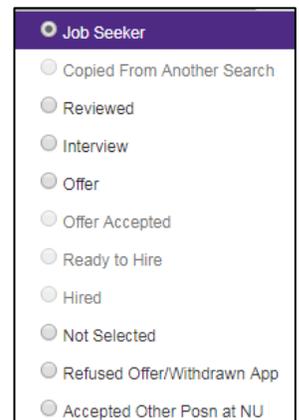
The screenshot shows the 'Applicant Information' tab selected. At the bottom, the 'Finalist' field now has a minus sign (-) next to it, indicating the applicant is now a finalist. Other fields remain the same as in the previous screenshot.

3. Navigate back to the **Applications** tab in the top navigation bar. Candidates designated as finalists will now appear in the **Finalists** tab.

11. Enter Disposition Codes

Access: To perform the actions described in this section, you must have access to edit disposition codes. All system users with the role Search Administrator have this access. Search Administrators can also give this access to other staff members by adding them to the search committee and setting their permissions accordingly.

About Disposition Codes: Disposition codes can be used in two ways. First (and optionally), they provide a means by which to track applicant status and review phases of a search. You can assign applicants to disposition codes (e.g., reviewed or interview) and then filter your applicant list by disposition code. The additional and **required use** of disposition codes is to communicate decisions about applicants to the University. Final disposition codes **must** be assigned to all applicants by the time you submit a draft offer to FSM for review via the business plan database.



A vertical list of disposition codes for a 'Job Seeker'. The codes are: Copied From Another Search, Reviewed, Interview, Offer, Offer Accepted, Ready to Hire, Hired, Not Selected, Refused Offer/Withdrawn App, and Accepted Other Posn at NU. Each code is preceded by a radio button.

When an individual applies for a faculty position, a disposition code of "Job Seeker" is automatically assigned. As you conduct the search, you may wish to assign disposition codes of "Reviewed" or "Interview" to track steps of the review process. By the end of the search (when you are proposing a finalist for offer through the FSM business plan database), you must assign one of the following disposition codes to each applicant:

- **Offer** – use for the preferred finalist. *This individual must be proposed for an offer through FSM's online business plan database. Occasionally, FSM extends multiple offers from the same HR Job ID; in such cases, the multiple finalists receiving offers should have the disposition code of "Offer."*
- **Not Selected** – use this code when the search committee does not choose the applicant as the finalist; you will be asked to supply a disposition code reason from the list below.

<i>Disposition Code Reason</i>	<i>Description/Usage Guidance</i>
Min Qualifications Not Met	Candidate did not meet advertised minimum qualifications
Pref. Qualifications Not Met	Candidate did not meet advertised preferred qualifications
Resch/expertise not a match	Content or direction of candidate's research or expertise not a match for the department
Unsuccessful Job Talk/Presentation	Candidate performed poorly in on-campus talk or presentation
Quality of resch/tchng lower than select app	Quality of candidate's research or teaching is lower than the selected candidate
Lack of external funding	Candidate has not demonstrated success in securing external funding
Less qualified than selected app	Candidate is not as qualified as the selected candidate
No work authorization	Candidate lacks the proper work authorization
Job Opening Cancelled	Search cancelled; all remaining applicants should receive this code at time of cancellation
Falsification of Information	Candidate falsified application materials or information
Other Candidate Preferred	Other candidate preferred
Job Seeker Not Considered	Candidate applied after deadline and was not reviewed/considered
Unsuccessful Reference	Letters of recommendation, or in person references, raised concerns

- **Refused Offer / Withdrawn App** – use for candidates who withdraw from the application process or refuse an offer; you will also be asked to supply a disposition code reason from the list below.

<i>Withdrawn Application (should also be used for candidates who refuse an offer)</i>	
<i>Disposition Code Reason</i>	<i>Description/Usage Guidance</i>
No reason given/other	Candidate withdraws their candidacy, or refuses an offer, without providing a reason
Salary insufficient	Salary offered to candidate was insufficient
Startup pkg insufficient	Start-up package offered to candidate was insufficient
Dual-career	Unable to find a position for candidate's partner or spouse
Lost counteroffer	Candidate actively retained by home institution
Decided to stay in current job	Candidate decided to stay at home institution
Not willing/able to relocate	Candidate decided not to relocate
Accepted another position	Candidate accepted a different position; detailed reason as to why is unknown

- **Accepted Other Posn at NU** – use this for candidates who:
 - have accepted another position at Northwestern University OR
 - have been offered another position at Northwestern University that they are considering OR
 - are being considered for another position at Northwestern University

Note: If the individual accepted a position at another institution, use the code "Refused Offer / Withdrawn Application" instead.

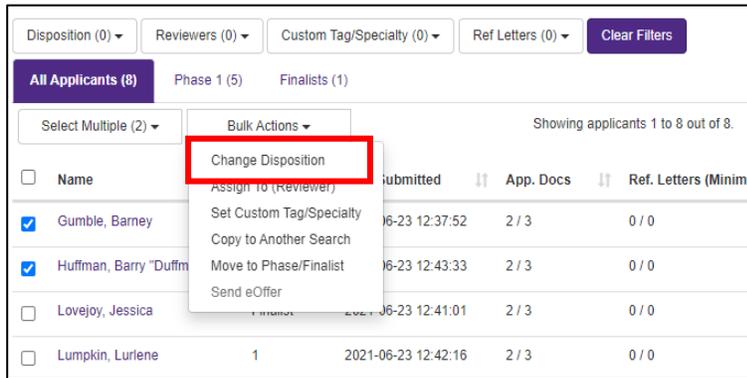
Assign Disposition Codes to One Applicant or Multiple Applicants Simultaneously via Bulk Actions

1. Before assigning disposition codes to multiple individuals simultaneously, make sure that assigning the exact same code (and reason, if applicable) is appropriate. For example, you might have 10 applicants who will be dispositioned as "Not Selected." If three were not selected due to the reason "Pref. qualifications not met" and seven were not selected due to being "Less qualified than selected app," then you should follow the bulk action process twice to disposition each batch separately.
2. Navigate to the **Applications Summary** screen for a search (see [SECTION 3](#)).
3. Click the tab containing the list of applicants you want to work with (e.g., All Applicants, Phase 1, Finalist, etc.).

Tip: All applicants are required to have a final disposition code assigned by the time the draft offer letter is submitted to FAO via the business plan database. To easily search for applicants who do not have one of the final disposition codes applied, you can use filters (see [SECTION 24](#) for more information on filtering applications).

- a. Make sure you are in the All Applicants tab.

- b. Use the **Dispositions** filter field to select codes that are not final dispositions (there are three: “Job Seeker,” “Reviewed,” and “Interview”). The applicants that appear in the list need final disposition codes entered.
4. Select one or more applicants using either the individual checkboxes to the left of applicant names, or the **Select Multiple** field above the applicant list (see [SECTION 7](#) for more info on selecting applicants).
5. Click on the **Bulk Actions** dropdown and select **Change Disposition**.



6. In the window that opens, select the **Disposition** from the dropdown; if required, also specify the **Rejection Reason** or **Withdrawal Reason**. Then press **Save**.

Assign Disposition Code to One Applicant via the Applicant Information Screen

You can also record a disposition code for an applicant within the context of reviewing their individual application:

1. Open an application (see [SECTION 3](#)).
2. Make sure you are in the **Applicant Information** tab.
3. Scroll down to find the **Applicant Disposition Information** panel where you can enter disposition codes.



12. Check How Many Applicants Need Final Disposition Codes Assigned Across Your Searches

In order to extend an offer to your chosen finalist, you must apply final disposition codes to all applicants. FRS offers a means to quickly look across all of your active searches to see how many applicants are missing final disposition codes for each search.

1. Log in to FRS (<https://facultyrecruiting.northwestern.edu>) with your netID and password. If you experience login problems, consult [SECTION 1](#) of this guide.
2. You will land on the **Dashboard** screen. Locate the search you want to review. If you can't find it, configure your dashboard to display all search statuses to be sure it isn't hidden from view ([SECTION 22](#)).

- Look for the **Final Dispositions** column on the dashboard. This column is not included in your dashboard by default, so you will need to add it if you have not done so previously. To add it, go to the **Optional Fields** dropdown list. After you have selected **Final Dispositions**, press the **Set** button to have the column added to your dashboard.

Status	Search ID	HR Job ID	Title	Department	Submitted	Final Dispositions
Active	330	34759	Academic Dermatologist	MED-Dermatology	23	16 of 23
Active	276	34414	Academic General Pediatrics and Medical Director of Clark Deming Practice	MED-Pediatrics	4	0 of 4
Active	151	33685	Academic Gynecologic and Perinatal Pathologist	MED-Pathology	6	0 of 6
Active	502	36775	Academic Hospitalist	MED-Hospital Medicine	59	13 of 59
Active	434	35728	Adolescent Medicine Faculty Member in Mental Health in Primary Care	MED-Pediatrics	3	0 of 3

- The **Final Dispositions** column reports the number of applicants who have been assigned a final disposition code compared to the total number of applicants. If the first and second number are equal (e.g., 87 of 87), then all applicants are dispositioned. If the first number is less than the second number, then there are applicants missing final disposition codes and you need to assign final dispositions before submitting a draft offer for review through the business plan database. See [SECTION 11](#) above for guidance on entering disposition codes.

Search ID	HR Job ID	School/Admin Unit	Department	Title	Submitted	7-Day	Today	Reviewed by You	Final Dispositions
52	32237	Feinberg School of Medicine	MED-Microbiology-Immunology	Faculty Position in Bacteriology	87	0	0	0 of 87	87 of 87
32	32035	Feinberg School of Medicine	MED-Anesthesiology	Endowed Professorship in Pain Medicine	4	0	0	0 of 4	4 of 4
75	32580	Feinberg School of Medicine	MED-Hematology Oncology	Hematology and Oncology Division Chief	4	0	0	0 of 4	3 of 4

13. Download the Search Summary Report

- From the **Dashboard** tab in FRS, navigate as follows:
 - Click on the **Title** of the search you want to view. If you can't find it, configure your dashboard to display all search statuses to be sure it isn't hidden from view ([SECTION 22](#)).
 - Click on the **Applications** tab in the top navigation bar.
 - Click on the **Finalists** tab.
- Make sure the list of finalists is complete and correct. If it is not, refer to [SECTION 10](#) of this guide to designate applicants as finalists.
- Make sure that each finalist has a final disposition code assigned (see [SECTION 11](#)).
- Press the **Search Summary Preview** button to generate and download a copy of the Search Summary Report that the Office of the Provost will obtain from the system.
- Provide the Search Summary Report to whomever writes the narrative description of the search process following the search (the narrative search summary appears in the Chair's Recommendation for Faculty Appointment when the department proposes a candidate for an offer). **Make sure the narrative description of the search process and the pre-populated Search Summary Report do not contradict one another.**

6. The pre-populated Search Summary Report from FRS will be uploaded to the FSM business plan database as part of the offer letter approval process.

14. Refer/Copy Applicant to a Different Search

This process is used when candidates apply to one search, but you wish you to consider them for a different position. You may copy their application and document uploads to a different search in FRS so that the applicant does not need to submit a second application to be considered for the alternate position.

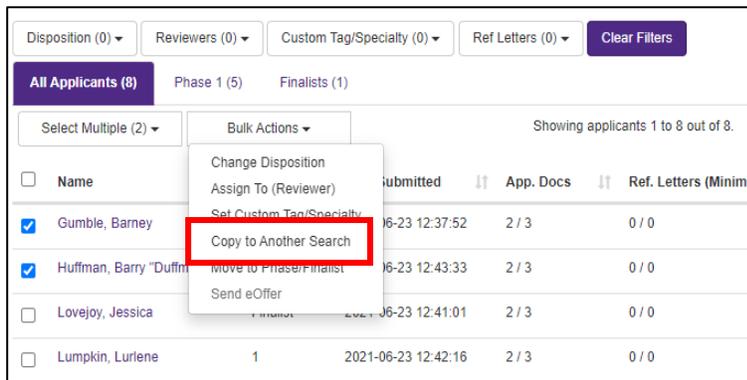
Pre-conditions for Copying an Applicant to a Different Search

- The search the application is being copied to must have **Active** status in FRS. (The search being copied from can have any status.)
- To copy an applicant from one search to another, you must have access to both searches in FRS. If you do not (e.g., you are referring an applicant to a search in another department), contact fao@northwestern.edu to request that an application be copied. Provide the applicant's name, the HR Job ID of the search being copied from, and the HR Job ID of the search being copied to; also copy the department administrator from the other department on the email when making the request.

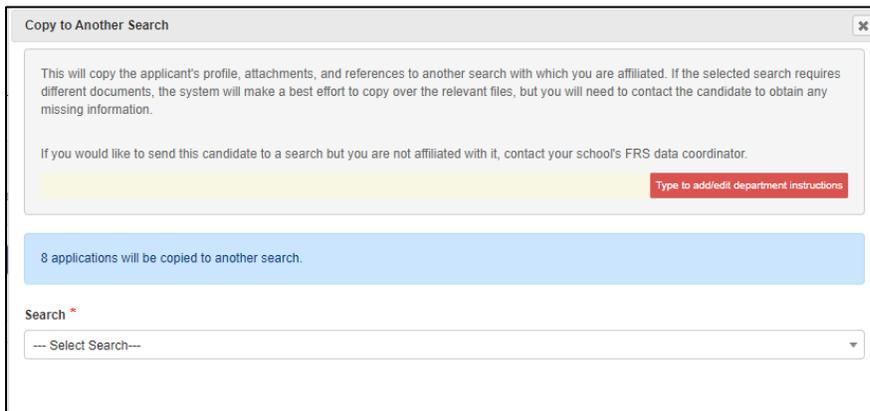
Copy Up to 10 Applicants to a Different Search Simultaneously via Bulk Actions

1. Log in to FRS (<https://facultyrecruiting.northwestern.edu>) with your netID and password. If you experience login problems, consult [SECTION 1](#) of this guide.
2. You will land on the **Dashboard** screen. Configure your dashboard to display **Active** searches if they do not already display ([SECTION 22](#)) and locate the target search that should receive the copied application. Write down its **HR Job ID**.
3. Next locate the search that originally received the application you want to copy. Click on the **Title** of that search.
4. Click the **Applications** tab in the top navigation bar to access the list of applicants.
5. Click the tab containing the list of applicants you want to work with (e.g., All Applicants, Phase 1, Finalist, etc.)
6. Select **up to 10** applicants using the individual checkboxes to the left of applicant names (see [SECTION 7](#) for more info on selecting applicants). **FRS can only copy 10 applications at a time.**

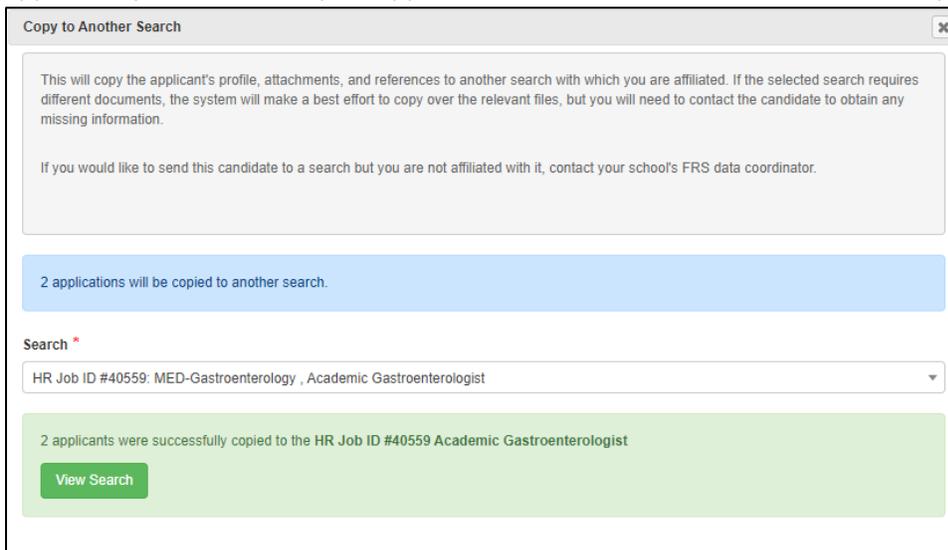
- Click on the **Bulk Actions** dropdown and select **Copy to Another Search**.



- Click on the **Select Search** dropdown list and select the HR Job ID of the target search that should receive a copy of the application(s). Then press **Save**. If the original search had different required/optional document uploads, the target search will only receive the documents the two searches have in common. The target search will be missing any required documents that the original search did not also require. In that case, you could contact the candidate to collect additional materials by email and upload them to the application (see [SECTION 5](#)).



- You will receive confirmation that the application has been copied (or an alert about any errors), with an opportunity to view the copied application in the context of the HR Job ID that just received it.



10. The applicant will have the disposition code **Copied From Another Search** in the target search that received a copy of the application.
11. The system automatically adds an administrative note to the applicant’s record in the target search to document that the application was copied from another search. (For more information on administrative notes, see [SECTION 27.](#))

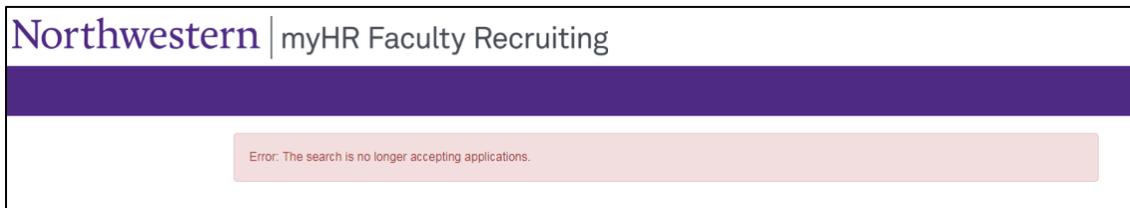
Administrative Notes		
Notes	User	Updated
This application was copied from JO # 32113. If that search has different document type or reference requirements, you may need to contact this applicant for missing information.	Bridget Mullan	2018-04-30 16:28:09

15. Place a Search on Hold / Prevent the Receipt of New Applications

When you submit an offer for review through the business plan database, FSM will typically put your search on hold in FRS to prevent the receipt of new applications that would continue needing final disposition codes assigned. You may desire to put a search on hold sooner.

What Happens When a Search is Placed on Hold?

- In the FRS dashboard, the search status will appear as **Hold**. You can still execute the search management tasks described in this guide while the search is in hold status.
- The ad stops displaying on the NU Careers site.
- The FRS job application link becomes inactive. Applicants who click on the link will receive a message alerting them that applications are no longer being accepted:



- You won’t receive new applications that continue to need final disposition codes assigned.

Why Place a Search on Hold?

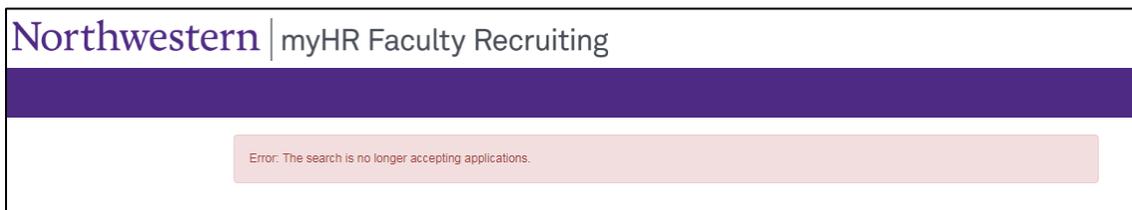
A hold should be placed when you want to prevent new applicants from applying. These are example use cases:

- The search was moved to Active status before the search committee was ready to receive applications. Placing a hold is the mechanism to remove the Active status.
- The search was run for a while but did not yield a finalist; the search committee would like to pause the search and post the ad again later.
- The search is in its final stages and you don’t want to receive additional applications while interviewing finalists.
- You are drafting the offer for the preferred finalist and don’t want to continue applying final disposition codes to new applicants.
- As noted above, FSM will generally place a search on hold in FRS when an offer is received through the business plan database. This locks the applicant list at a point in time. Otherwise, departments need to continue monitoring the search and applying disposition codes until the Provost receives the appointment paperwork

(which is typically well after an offer is submitted for review through the business plan database).

How to Place a Search on Hold

1. Only the Office of the Provost can change the search status to “hold.” Please contact the FSM Faculty Affairs Office at fao@northwestern.edu and provide the **HR Job ID** of the search that should be placed on hold. Since there are so many numbers associated with searches (e.g., FRS Search ID, HR Job ID, FAO#) that could be mixed up, in your email request, please include a screen shot of the search from FRS (the **Search Details** panel is ideal) to ensure that the right position is placed on hold.
2. Once complete, the search will have the status of **Hold** on your FRS **Dashboard**.
3. Remember to remove any job postings you have placed online since the FRS link contained in it will be inactive. Applicants will see this if they try to apply:



16. Return a Search to “Active” Status from “Hold” Status

When you are ready to return a search to Active status after placing it on hold, use the process below.

Important: Be mindful of declined offers. If your preferred finalist declines your offer and you need to solicit more applications to identify another finalist, confirm that the search status is “Active” in FRS. The search was probably placed on hold when you extended the offer to your initial finalist, and new applications won’t be received if it remains on hold. However, if the search identified a pool of finalists and you want to extend an offer to another candidate from that pool, you may prefer to leave the search on hold.

How to Return a Search to Active Status

1. Only the Office of the Provost can return a search to “active” status after placing it on hold. Please contact the FSM Faculty Affairs Office at fao@northwestern.edu and provide the **HR Job ID** of the search that should become active. Since there are so many numbers associated with searches (e.g., FRS Search ID, HR Job ID, FAO#) that could be mixed up, it is recommended that your email request includes a screen shot of the search from FRS (the **Search Details** panel is ideal) to ensure that the right position becomes active.
2. Once complete, the search will appear in the **Active** tab on your FRS **Dashboard**.

Revise Job Posting or Search Configuration Settings

For each search, a Search Administrator defined the search configuration settings before the search became active in FRS. This section describes how to change the job posting or search configuration settings after a search is active.

17. Update the Advertisement Posted on the NU Careers Site

Only the Office of the Provost can revise the ads posted on the NU Careers site. To request revisions, please upload a revised ad in tracked changes to the business plan (**do not delete** the originally approve ad) and alert fao@northwestern.edu. The Faculty Affairs Office will review the revised ad and forward to the Provost's office to request the changes.

18. Add or Remove MyHR Search Committee Members

Only the Office of the Provost can update the MyHR Search Committee. To request changes, please contact fao@northwestern.edu and indicate who should be added to or removed from the MyHR search committee (if removing the person designated as the search chair or equity representative, also indicate who will fill the role instead). If adding search committee members, consider whether the process described below to Add Additional Search Committee Members/Administrators ([SECTION 19](#)) could be used instead.

If your search committee members are not interacting with FRS, it may not be necessary to update the MyHR search committee, and you could instead describe changes to the search committee in the Chair's letter at the time of preparing a faculty offer.

19. Add Additional Search Committee Members/Administrators

1. Log in to FRS (<https://facultyrecruiting.northwestern.edu>) with your netID and password. If you experience login problems, consult [SECTION 1](#) of this guide.
2. You will land on the **Dashboard** screen. Select a search by clicking on its **Title**, which will open the **Overview** screen for that search.
3. Click on the **Search Committee** button at the top of the Search Details panel.



4. Locate the **Users** section: In this panel, you select one or more users from the dropdown list, press the **select users** button, specify permissions, and press **Add User(s) Permissions**. The individual(s) selected will then appear under the **Additional Search Committee Members/Administrators** header (scroll to bottom of page to find), where you can also edit their permissions.

If users are not available for selection in the Users panel, then they need to be added as a system user in FRS. To do that:

- Scroll up to find the **System Users** tab.
- Click on the **plus icon** in the upper right corner of the **System Users** panel
- Enter the netID of the person you want to add
- Then return to the **Search Committee** tab and execute the steps in the **Users** panel as describe above

20. Change the Order of Document Uploads in the FRS Job Application

When the search was configured, a Search Administrator identified what document uploads to collect from applicants as well as the order in which the document fields are displayed to the applicant on the job application. That also controls how documents are ordered in the single PDF generated when you download all documents for an applicant. You can change the order of documents as presented in the application and as downloaded (e.g., move the cover letter to come before the CV):

1. From the **Dashboard** tab in FRS, navigate as follows:
 - a. Click on the **Title** of the search you want to view. If you can't find it, configure your dashboard to display all search statuses to be sure it isn't hidden from view ([SECTION 22](#)).
 - b. Click on the **Settings** tab in the top navigation bar.
 - c. Click on the **Search Options** tab.
2. Locate the **Document Type** panel. Hover your cursor over the **Display Order** column for the document you wish to move; then drag and drop it higher or lower in the list of documents.

21. Edit Search Details, Search Administrators, Search Contacts, or Search Options

The Search Details, Search Administrators, Search Contacts, and Search Options (i.e., the degree types dropdown list, the document types collected from applicants, and email templates) can only be edited when a search is in "Pre-Active" status. If any of those items needs editing, contact fao@northwestern.edu to revert an active search back to "Pre-active" status. Include a description of the change(s) needed, for FAO will make the change directly if it is more expedient to do.

Other Useful Features

FRS offers more features and functionality than are described in this guide. This section highlights some additional features that may be useful to you in managing a search.

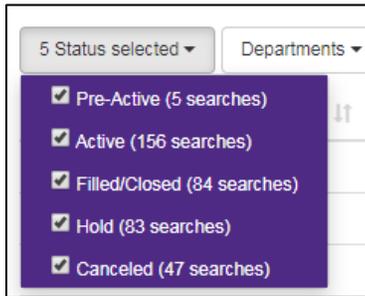
22. Customize Dashboard

The **Dashboard** tab in the top navigation of FRS lists the searches to which you have access. You can customize your dashboard by selecting which columns display and applying filters to narrow the list of searches to those of particular interest to you.

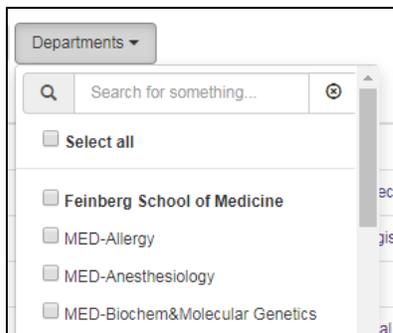
1. **Default View:** By default, the dashboard screen shows only searches that have **Active** status, and eight columns display in the table. You can change the rows and columns you see using the filters above the table. To change your personal default view, set the filters you desire (see descriptions below) and then press **Set** to save your preferences. If you later wish to restore the system defaults, press the **Reset** button.

Status	HR Job ID	Title	School/Admin Unit	Department	Submitted	7-Day	Reviewed by You
Active	34759	Academic Dermatologist	Feinberg School of Medicine	MED-Dermatology	23	0	0
Active	34414	Academic General Pediatrics and Medical Director of Clark Deming Practice	Feinberg School of Medicine	MED-Pediatrics	4	0	0
Active	33685	Academic Gynecologic and Perinatal Pathologist	Feinberg School of Medicine	MED-Pathology	6	0	0

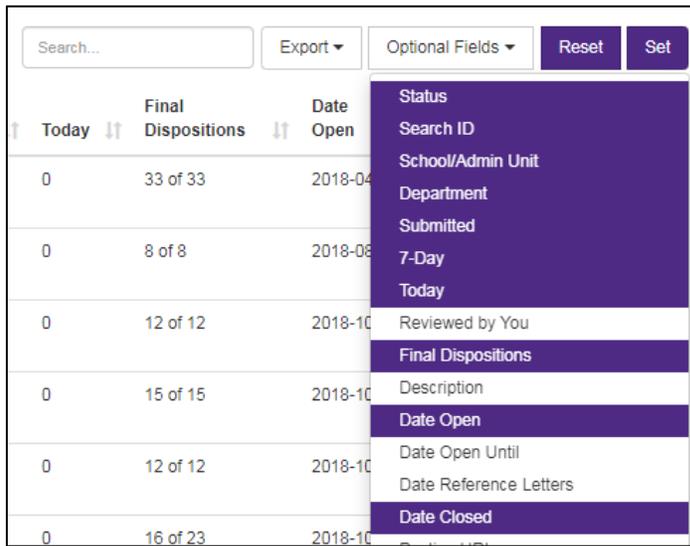
- a. **Search Status Filter:** Use the filter above the Status column to include searches with other statuses on your dashboard. When attempting to configure a search, you will need to see the searches with Pre-Active status. Feinberg recommends selecting all search statuses so that none are hidden from your view when searching.



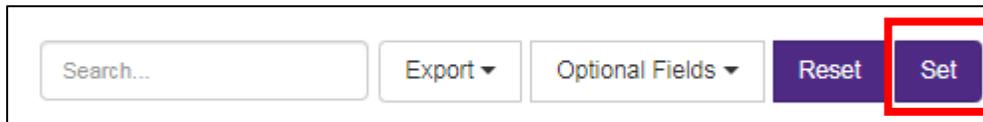
- b. **Department Filter:** If you have access to searches in more than one unit, you can use the Departments filter to restrict your view to searches in specific units.



- c. **Optional Fields:** Click on the **Optional Fields** filter to select the columns you wish to view in the table. The selected columns are highlighted in purple; click on an option in the list to select or de-select it. Feinberg recommends including the Final Dispositions column, which will highlight whether there are applicants missing final disposition codes. All applicants must have final disposition codes applied by the time a search concludes.



2. **Save Your Personal Defaults:** If you wish to save your selections as your personal defaults, press the **Set** button. The next time you return to the Dashboard screen, it will be customized according to the preferences you selected.

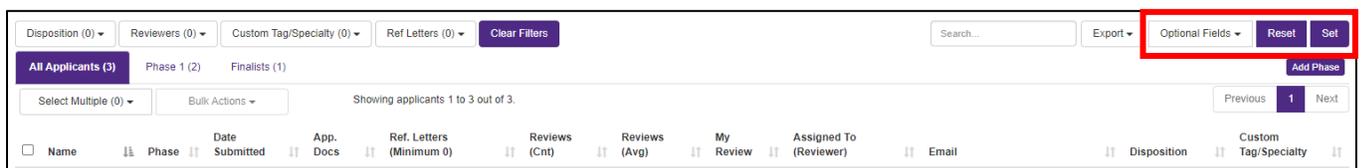


3. **Restore System Defaults:** Pressing the **Reset** button will clear all customizations you made and revert your dashboard back to the system default.

23. Customize Applications Summary Screen

The Applications Summary screen contains the list of applicants for a particular search. You can customize it by selecting the columns that display.

1. Navigate to the Applications Summary screen (see [SECTION 3](#))
2. By default, the Applications Summary screen displays eleven columns. To add or remove columns in your view, use the **Optional Fields** dropdown in the upper right part of the screen.



3. To save the selections as your personal default view, press the **Set** button. Your selections will be saved (even if you open a different search to view a different set of applications) until you make different selections and press set again, or until you press reset.

- Pressing the **Reset** button will clear all customizations you made and revert your dashboard back to the system default.

24. Filter Applications

- Navigate to the Applications Summary screen (see [SECTION 3](#)).
- Click on the tab containing the list of applicants you want to work with (e.g., All Applicants, Phase 1, Finalist, etc.). The phase/finalist tabs essentially operate as filters, showing only the applicants who are in that phase.
- To further limit results within the tab you have selected, use the filter fields that appear above the phase tabs. There are four filters (described below) that can be used individually or in combination with one another. After you choose the filter options, the applicant list will change to show you the applications within the tab that meet the filter criteria.

Filter Field	Description
Dispositions	Filter applications by disposition code. This is especially helpful when looking for applications that do not have final disposition codes applied. See SECTION 11 to apply disposition codes and learn what constitutes a final disposition code.
Reviewers	Filter applications by the name of an individual assigned to review applications. This filter is only relevant if applications have been assigned to reviewers (see SECTION 26). Using this filter is especially helpful if you have been assigned to review applications and you want to see only applications assigned to you.
Custom Tag/Specialty	Filter applications based on the custom tag/specialty used to categorize an application. This filter is only relevant if custom tags have been created and applied to applications (see SECTION 25).
Ref Letters	Feinberg users should ignore this filter. Because Feinberg does not solicit reference letters via FRS, the filter is irrelevant.

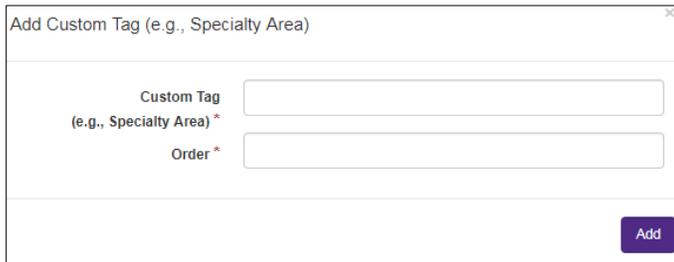
- Your filter selections are automatically saved until you update them or press the Clear Filters button.** This means that if you navigate to a different tab within the same search, the filter options you last selected will be applied to the new tab you click on. Additionally, if you navigate to an entirely different search to view applications, the saved filters will be applied as you navigate the tabs within that search.

25. Create Custom Tags to Categorize/Track Applicants

FRS offers a means to categorize applicants using a dropdown list that you customize with your own list of options. For example, you might conduct a search for a general position like “cancer specialist” and want to categorize applicants according to the type of cancer they specialize in (e.g., “gynecologic,” “neurologic,” “urologic,” etc.). Or you might have a search that is open to candidates at any academic rank and want to categorize applicants according to the rank they are qualified to hold (e.g., “Assistant Professor,” “Associate Professor,” “Professor”). This feature is available to all FRS users, not just Search Administrators.

Establish the List of Options for Categorizing Applicants

1. From the **Dashboard** tab in FRS, select a search by clicking on its **Title**, which will open the **Overview** screen.
2. Locate the **Custom Tag (e.g., Specialty Area)** panel. Click on the **plus icon** in the upper right corner of the panel and enter the following:
 - a. **Custom Tag:** Enter any tag name that would be meaningful to you in categorizing or tracking applicants. The tag that you enter will appear on a dropdown list.
 - b. **Order:** Enter a number to indicate where on the dropdown list you want this option to appear.



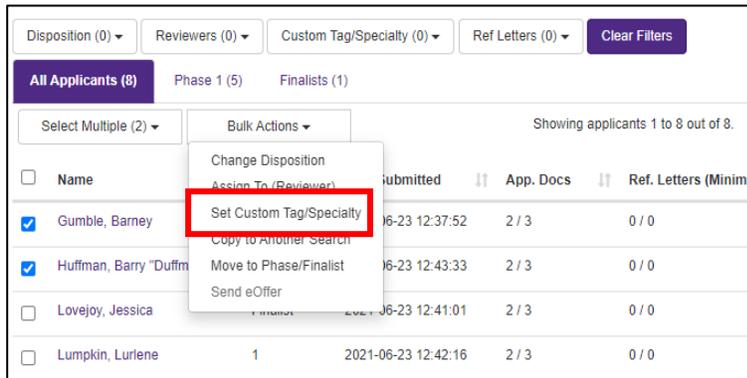
The screenshot shows a modal window titled "Add Custom Tag (e.g., Specialty Area)". Inside the modal, there are two text input fields. The first is labeled "Custom Tag (e.g., Specialty Area) *" and the second is labeled "Order *". A purple button labeled "Add" is positioned at the bottom right of the modal.

3. Repeat step number 2 for each custom tag you want to add to the list. To change any of the options you have entered:
 - a. Click on the tag name to select it (the row will be highlighted in blue).
 - b. Then click on the **pencil icon** (to edit) or the **trash can icon** (to delete) in the upper right corner of the panel.

Apply a Custom Tag to One Applicant or Multiple Applicants Simultaneously Using Bulk Actions

1. Navigate to the **Applications Summary** screen for a search (see [SECTION 3](#)).
2. Click the tab containing the list of applicants you want to work with (e.g., All Applicants, Phase 1, Finalist, etc.)
3. Select one or more applicants using either the individual checkboxes to the left of applicant names, or the **Select Multiple** field above the applicant list (see [SECTION 7](#) for more info on selecting applicants).
 - a. If you select an application that is already categorized with a tag, continuing with the steps below will result in overwriting the existing tag.
 - b. If you have already categorized some applications and are trying to identify the remaining applications needing categorization, you may wish to use the **Custom Tag/Specialty filter** to narrow the list of applications to those that are unassigned to a category. See [SECTION 24](#) on filtering applications.

- Click on the **Bulk Actions** dropdown and select **Set Custom Tag/Specialty**.



- In the window that opens, click on the **Select Custom Tag/Specialty** dropdown to choose a tag. The dropdown list displays the tags you created for the search.
- On the Applications Summary screen, the category will appear in the Custom Tag/Specialty column, if that column is set to appear on your screen (see [SECTION 23](#) to customize columns displayed on the Applications Summary screen).

Categorize One Application Using a Custom Tag via the Applicant Information Screen

You can apply a custom tag within the context of reviewing an individual application:

- Open an application (see [SECTION 3](#)).
- Make sure you are in the **Applicant Information** tab.
- Scroll down to find the **Search Committee Categorization** panel and edit the **Custom Tag/Specialty** field.

26. Assign Applications to a Reviewer

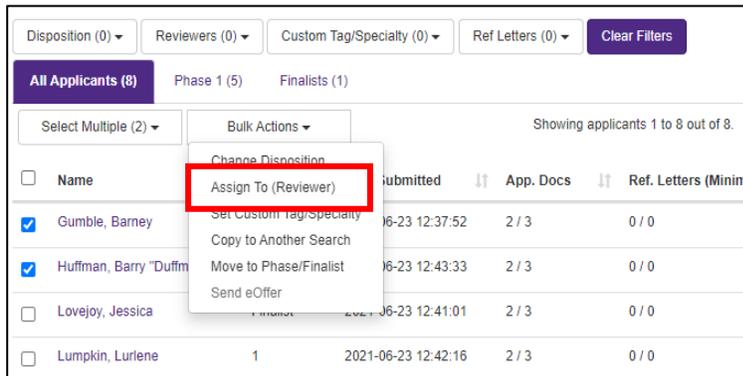
This feature is likely to be most useful in cases where the search committee is using FRS to review applications. An application can be assigned to 1-3 reviewers. Reviewers can then filter the application list to see only those applications they have been assigned to review. Eligible reviewers are individuals who hold any of the following FRS roles on the search: Search Administrator, MyHR Search Committee Member, or Additional Search Committee Member/Administrator.

Assign One Applicant or Multiple Applicants Simultaneously to 1-3 Reviewers

- Navigate to the **Applications Summary** screen for a search (see [SECTION 3](#)).
- Click the tab containing the list of applicants you want to work with (e.g., All Applicants, Phase 1, Finalist, etc.)
- Select one or more applicants using either the individual checkboxes to the left of applicant names, or the **Select Multiple** field above the applicant list (see [SECTION 7](#) for more info on selecting applicants).
 - If you select an application that is already assigned to a reviewer, continuing with the steps below will result in overwriting the existing reviewer assignment.

- b. If you have already assigned some applications to reviewers and are trying to identify the remaining applications needing assignments, you may wish to use the **Reviewers filter** (see [SECTION 24](#) on filtering applications) to narrow the list of applications to those that are unassigned.

4. Click on the **Bulk Actions** dropdown and select **Assign To (Reviewer)**.



5. In the window that opens, press the **Reviewers** button to see the list of individuals to whom the application(s) can be assigned. The list will include all individuals who hold the roles of Search Administrator, MyHR Search Committee Member, and Additional Search Committee Member/Administrator. After making your selections, press **Save**.
6. On the Applications Summary screen, the reviewer assignments will appear in the Assigned To (Reviewer) column, if that column is set to appear on your screen (see [SECTION 23](#) to customize columns displayed on the Applications Summary screen).

Assign One Application to 1-3 Reviewers via the Applicant Information Screen

You can also assign reviewers within the context of reviewing an individual application:

4. Open an application (see [SECTION 3](#)).
5. Make sure you are in the **Applicant Information** tab.
6. Scroll down to find the **Search Committee Categorization** panel and edit the **Assigned To (Reviewer)** field.

27. Enter, Edit, or Delete Administrative Notes on Applicant Records

You may find it helpful to record administrative notes on applicant records. This feature is available to Search Administrators and any Search Committee Members or Additional Administrators whose permissions are configured appropriately.

1. From the **Dashboard** tab in FRS, navigate as follows:
 - a. Click on the **Title** of the search to open the Overview screen.
 - b. Click on the **Applications** tab in the top navigation bar to open the Applications Summary screen.
 - c. Click on the **last name** of the desired applicant to open the Application Detail screen.

- Click on the **Administrative Notes** tab and then press **Add** to enter a note. Type your note and press **Add**; the note will be displayed on this page. You may also edit or delete notes from this screen using the appropriate buttons.

Applicant Information **Administrative Notes** Manage Documents

You can leave administrative notes for this applicant. The notes made here will also be listed in the "Applicant Information" tab.

Add Edit Delete

- The note is also visible or accessible from other locations:
 - Click on the **Applicant Information** tab and scroll to the bottom of the page. The note you entered is visible in the **Administrative Notes** panel:

Notes	User	Updated
Interview Scheduled 2/28/2018	Alexis Puzon	2018-02-02 09:27:53

- Click on the **Overview** tab in the top navigation bar. Then scroll to the bottom of the screen. The **Recent Administrative Notes** panel contains a log of the applicants for whom administrative notes were recently entered.

Applicant	User	Date
[REDACTED]	Alexis Puzon	2018-02-02 09:27:53
[REDACTED]	Alexis Puzon	2018-02-02 09:27:28