SmartPath™ Overview
Wayne State University

Fall 2020

Mountain Pass™

A note about this guide

A note about this guide:
This overview uses a generic implementation of SmartPath and assumes that a user is logging in with department-level credentials.

Your institution's implementation of SmartPath is unique and so are the credentials you will use.

For this reason, your experience of SmartPath will vary from the experience shown in this guide.

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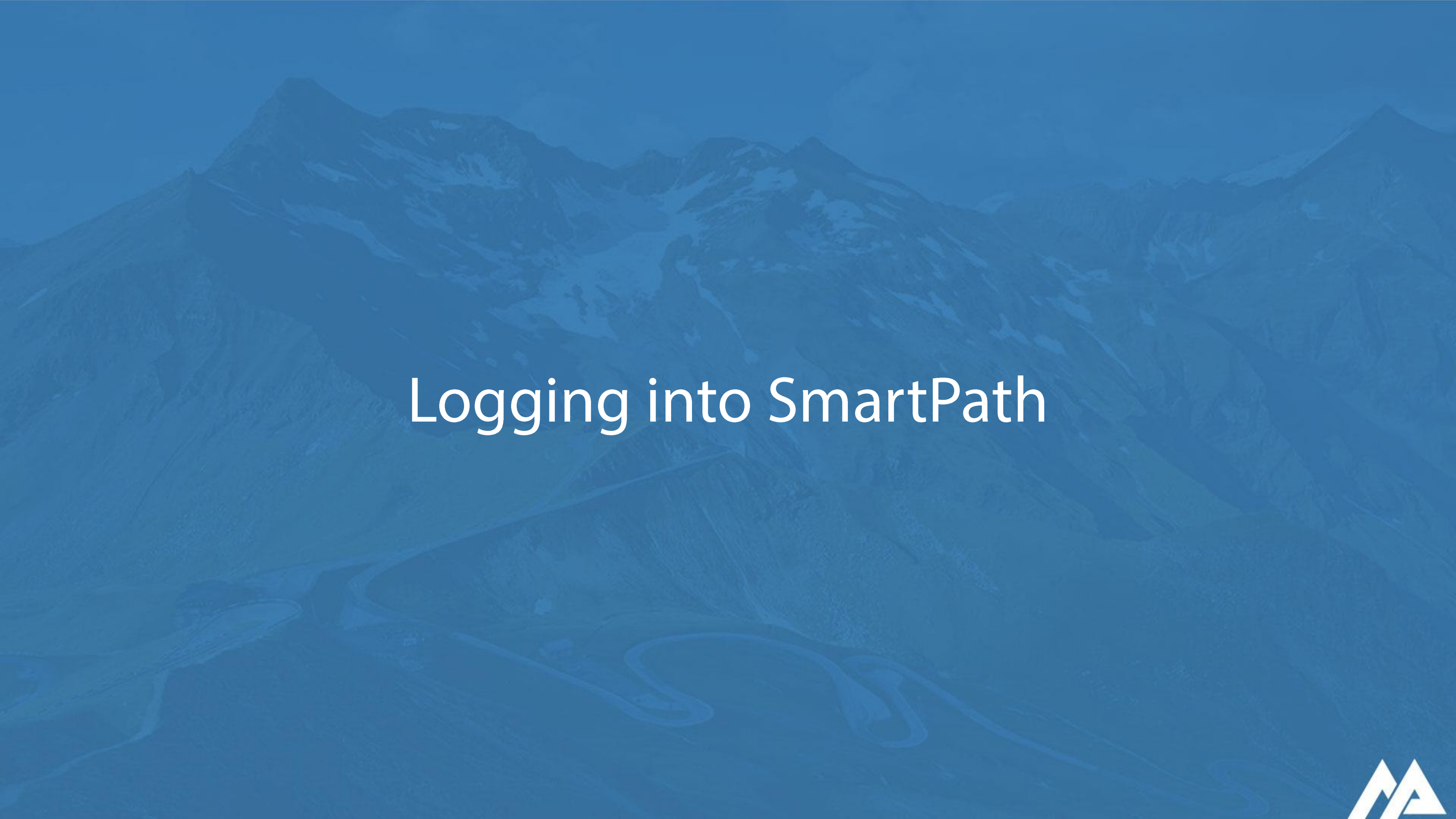


Logging into SmartPath

Logging into SmartPath

You can access SmartPath by using your WSU login credentials in Academica.
SmartPath uses your WSU credentials for authentication into the system.
SmartPath will function properly on all modern browsers.

SmartPath can be accessed through Academica as well:
Academica → Employee Resources → Administrative Systems → SmartPath

SmartPath Overview

SmartPath Overview

Overview

- SmartPath knows which steps are required for different titles, so you will only see the steps that are necessary for that particular title and workflow.

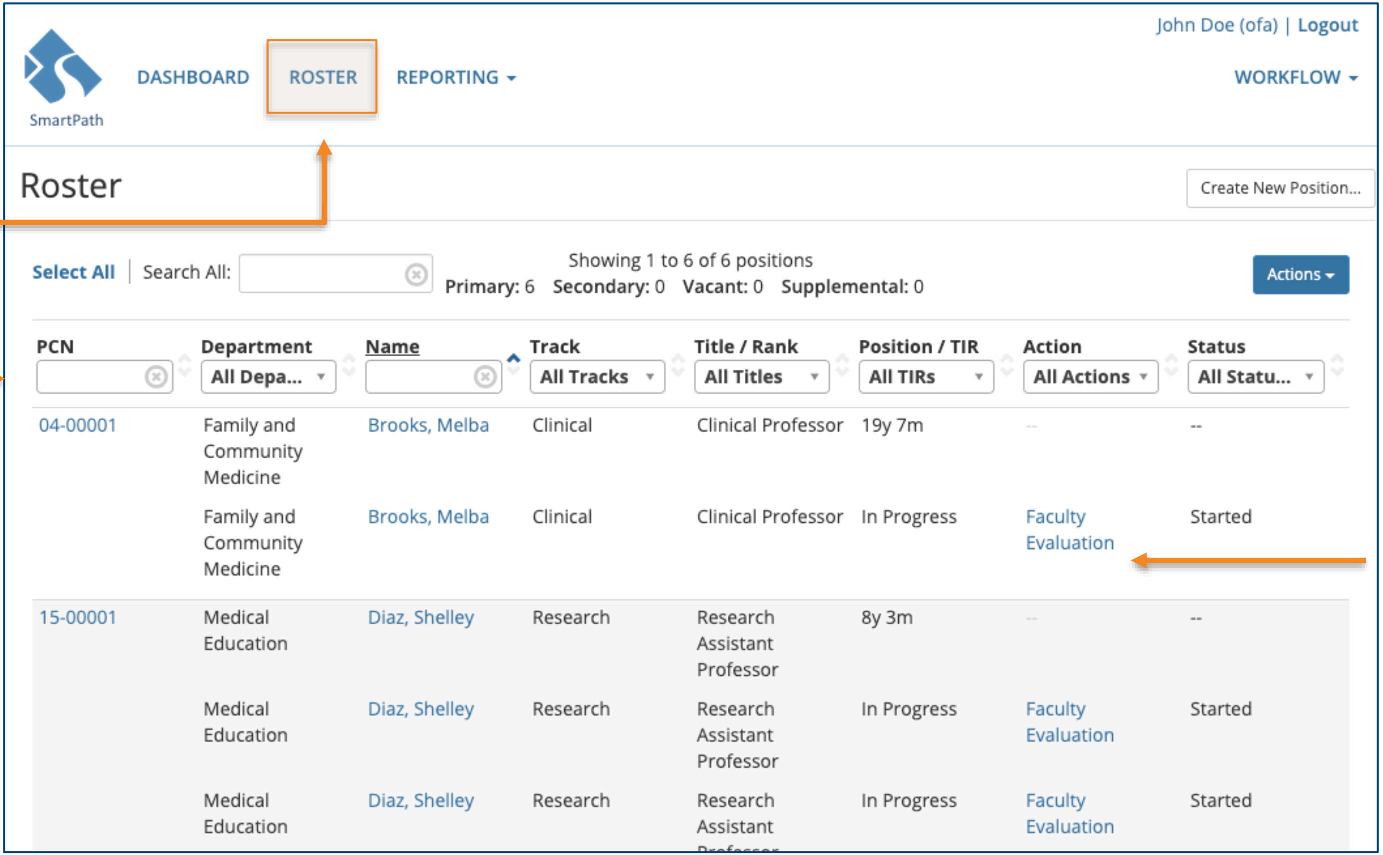
Security

- Security is role and permission based.
- Each user has one or more roles and each role contains a different set of permissions.
- These roles and permissions determine a user's access to each step in a workflow. Different types of access include:
    - Edit (complete steps; upload documents)
    - View (can see all information, but not make any changes)
    - Overview only (step label is grayed out and cannot see any information about the step)
    - None (step is hidden from view)

Roster

Access the roster from the navigation menu

Sort, search and filter to find the right person


SmartPath
DASHBOARD
ROSTER
REPORTING
WORKFLOW
John Doe (ofa) | Logout
Create New Position...
Select All
Search All:
Actions

Roster

Showing 1 to 6 of 6 positions

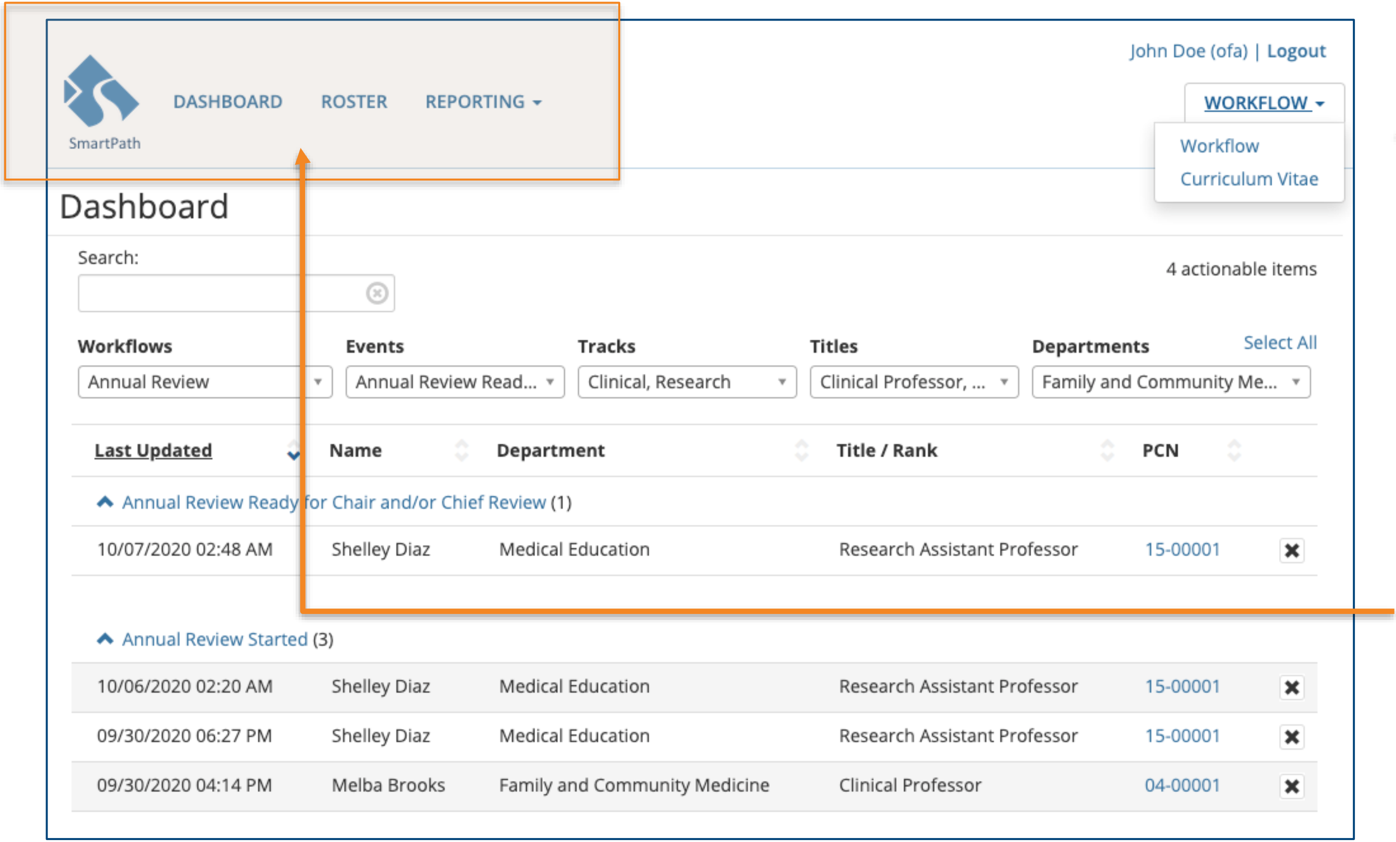
Primary: 6 Secondary: 0 Vacant: 0 Supplemental: 0

PCN	Department	Name	Track	Title / Rank	Position / TIR	Action	Status
	All Depa...		All Tracks	All Titles	All TIRs	All Actions	All Statu...
04-00001	Family and Community Medicine	Brooks, Melba	Clinical	Clinical Professor	19y 7m	--	--
	Family and Community Medicine	Brooks, Melba	Clinical	Clinical Professor	In Progress	Faculty Evaluation	Started
15-00001	Medical Education	Diaz, Shelley	Research	Research Assistant Professor	8y 3m	--	--
	Medical Education	Diaz, Shelley	Research	Research Assistant Professor	In Progress	Faculty Evaluation	Started
	Medical Education	Diaz, Shelley	Research	Research Assistant	In Progress	Faculty Evaluation	Started

Create a new position or appointment

Link directly to an "In Progress" workflow

Navigation


SmartPath
DASHBOARD
ROSTER
REPORTING
John Doe (ofa) | Logout
WORKFLOW
Workflow
Curriculum Vitae
Select All

Dashboard

Search:

4 actionable items

Workflows: Annual Review
Events: Annual Review Read...
Tracks: Clinical, Research
Titles: Clinical Professor, ...
Departments: Family and Community Me...

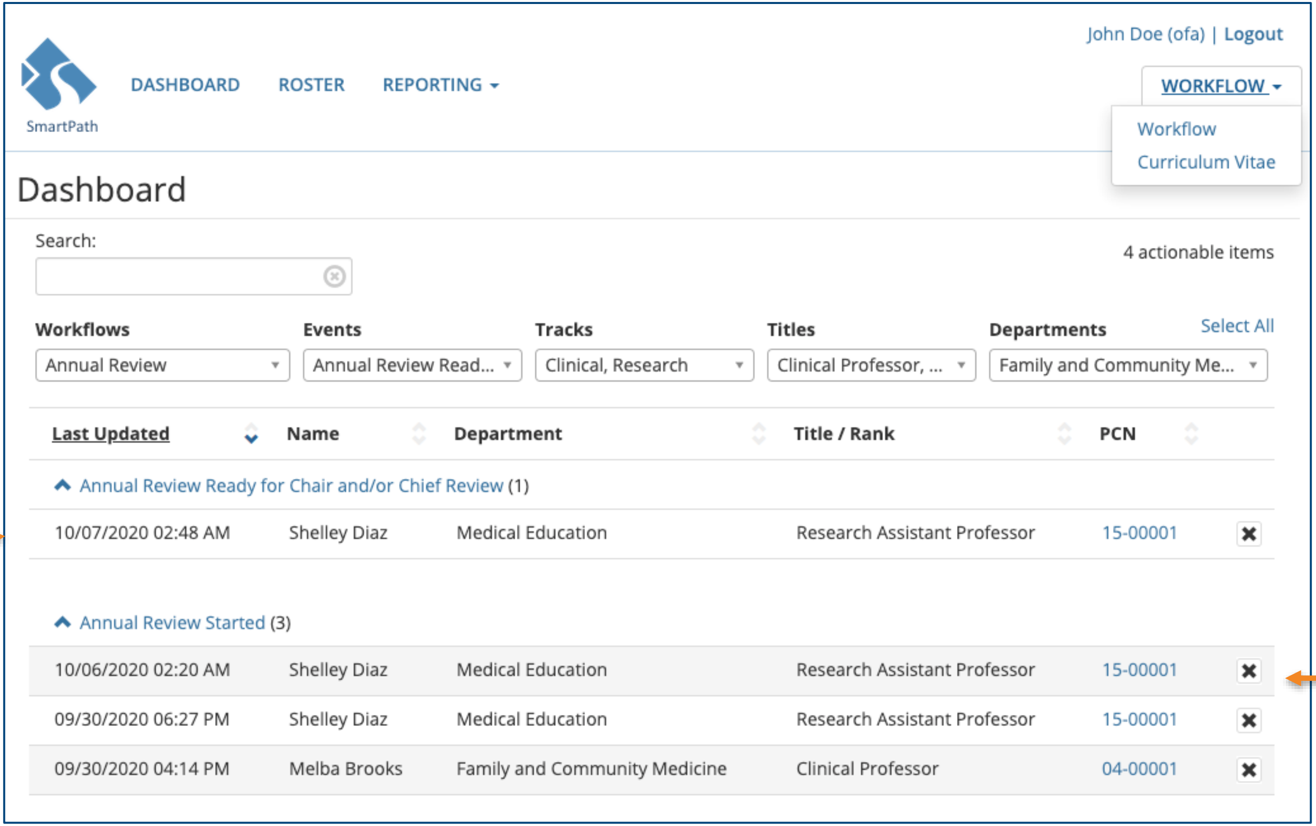
Last Updated	Name	Department	Title / Rank	PCN
Annual Review Ready for Chair and/or Chief Review (1)				
10/07/2020 02:48 AM	Shelley Diaz	Medical Education	Research Assistant Professor	15-00001
Annual Review Started (3)				
10/06/2020 02:20 AM	Shelley Diaz	Medical Education	Research Assistant Professor	15-00001
09/30/2020 06:27 PM	Shelley Diaz	Medical Education	Research Assistant Professor	15-00001
09/30/2020 04:14 PM	Melba Brooks	Family and Community Medicine	Clinical Professor	04-00001

Switch from Workflow to other modules, if available

Switch between Dashboard and Roster and access Reporting, if available

Dashboard

Notifications alert you to action required


SmartPath
DASHBOARD
ROSTER
REPORTING
John Doe (ofa) | Logout
WORKFLOW
Workflow
Curriculum Vitae
Select All

Dashboard

Search:

4 actionable items

Workflows: Annual Review

Events: Annual Review Read...

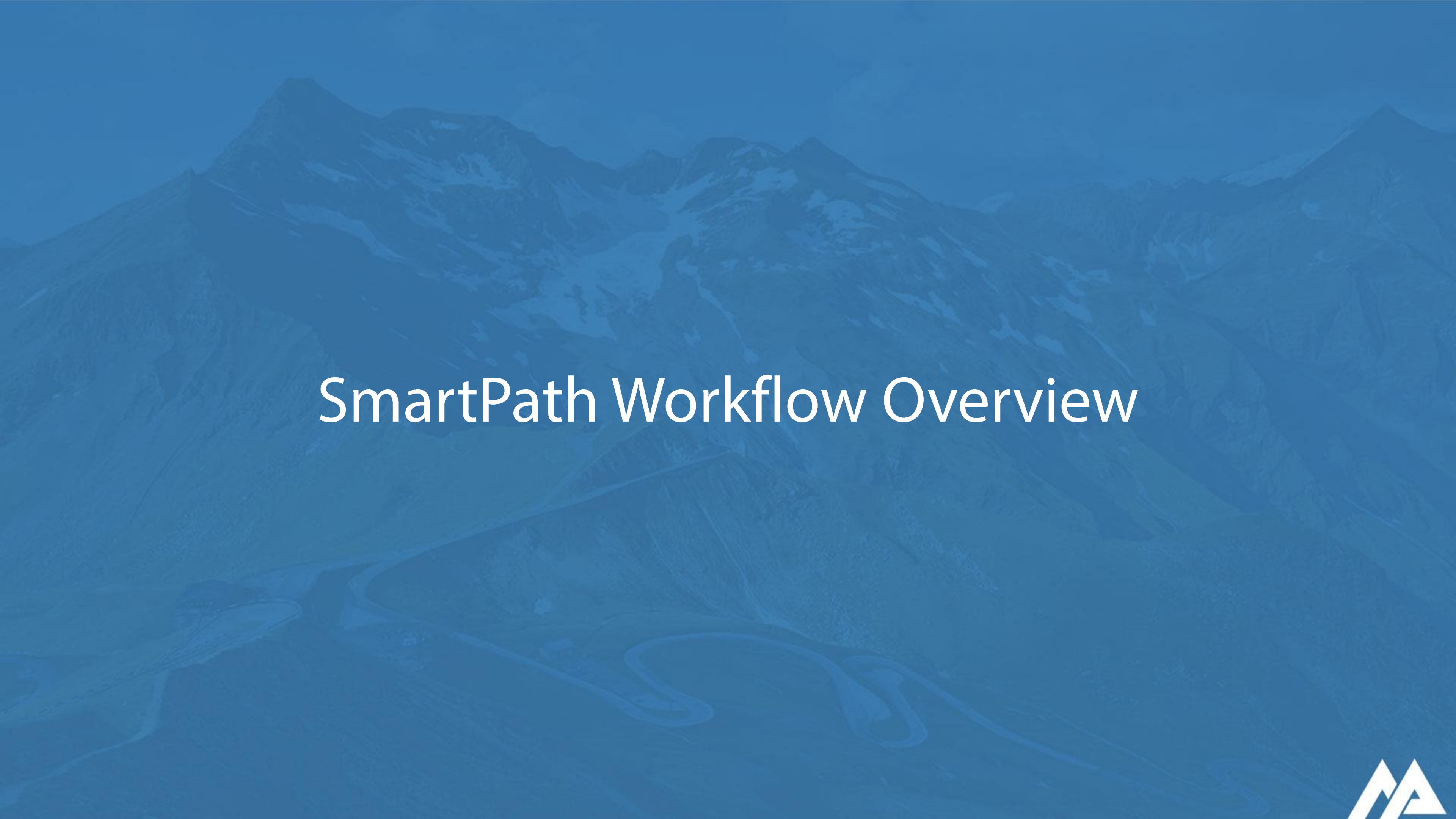
Tracks: Clinical, Research

Titles: Clinical Professor, ...

Departments: Family and Community Me...

Last Updated	Name	Department	Title / Rank	PCN	
Annual Review Ready for Chair and/or Chief Review (1)					
10/07/2020 02:48 AM	Shelley Diaz	Medical Education	Research Assistant Professor	15-00001	✖
Annual Review Started (3)					
10/06/2020 02:20 AM	Shelley Diaz	Medical Education	Research Assistant Professor	15-00001	✖
09/30/2020 06:27 PM	Shelley Diaz	Medical Education	Research Assistant Professor	15-00001	✖
09/30/2020 04:14 PM	Melba Brooks	Family and Community Medicine	Clinical Professor	04-00001	✖

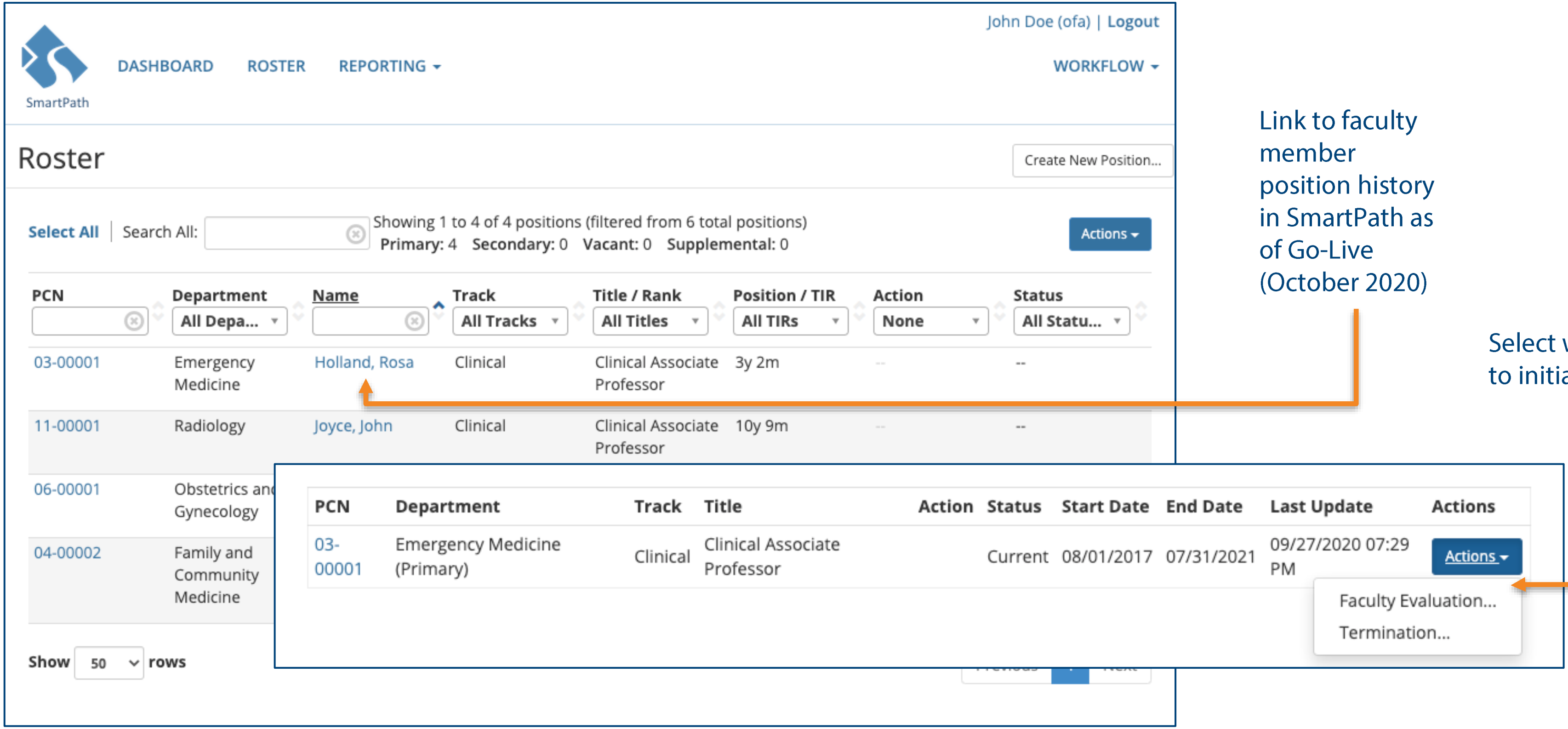
Link directly to a workflow if needed



SmartPath Workflow Overview

Workflow

Initiate New Workflows for a Current Faculty Member


SmartPath
DASHBOARD
ROSTER
REPORTING
WORKFLOW
John Doe (ofa) | Logout
Create New Position...
Select All
Search All:
Actions
Show 50 rows
Actions
Faculty Evaluation...
Termination...

Roster

Showing 1 to 4 of 4 positions (filtered from 6 total positions)
Primary: 4 **Secondary:** 0 **Vacant:** 0 **Supplemental:** 0

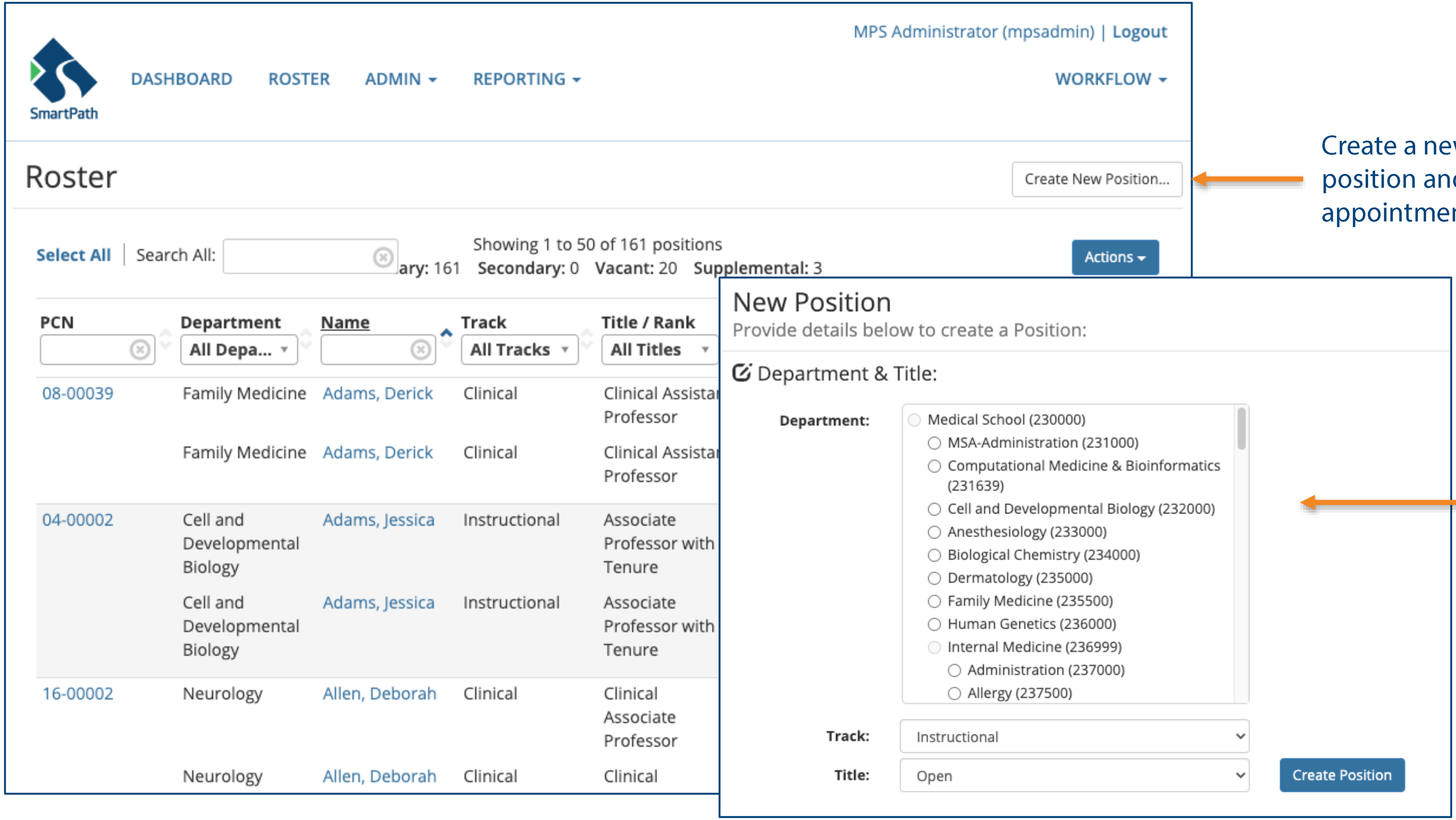
PCN	Department	Name	Track	Title / Rank	Position / TIR	Action	Status
	All Depa...		All Tracks	All Titles	All TIRs	None	All Statu...
03-00001	Emergency Medicine	Holland, Rosa	Clinical	Clinical Associate Professor	3y 2m	--	--
11-00001	Radiology	Joyce, John	Clinical	Clinical Associate Professor	10y 9m	--	--
06-00001	Obstetrics an Gynecology						
04-00002	Family and Community Medicine						

PCN	Department	Track	Title	Action	Status	Start Date	End Date	Last Update	Actions
03-00001	Emergency Medicine (Primary)	Clinical	Clinical Associate Professor		Current	08/01/2017	07/31/2021	09/27/2020 07:29 PM	Actions

Link to faculty member position history in SmartPath as of Go-Live (October 2020)

Select workflow to initiate

Workflow
Creating New Workflows



MPS Administrator (mpsadmin) | **Logout**

Roster

Search All:

Showing 1 to 50 of 161 positions

ary: 161 **Secondary:** 0 **Vacant:** 20 **Supplemental:** 3

PCN	Department	Name	Track	Title / Rank
	All Depa...		All Tracks	All Titles
08-00039	Family Medicine	Adams, Derick	Clinical	Clinical Assistar Professor
	Family Medicine	Adams, Derick	Clinical	Clinical Assistar Professor
04-00002	Cell and Developmental Biology	Adams, Jessica	Instructional	Associate Professor with Tenure
	Cell and Developmental Biology	Adams, Jessica	Instructional	Associate Professor with Tenure
16-00002	Neurology	Allen, Deborah	Clinical	Clinical Associate Professor
	Neurology	Allen, Deborah	Clinical	Clinical

New Position

Provide details below to create a Position:

Department & Title:

Department:

○ Medical School (230000)
  ○ MSA-Administration (231000)
  ○ Computational Medicine & Bioinformatics (231639)
  ○ Cell and Developmental Biology (232000)
  ○ Anesthesiology (233000)
  ○ Biological Chemistry (234000)
  ○ Dermatology (235000)
  ○ Family Medicine (235500)
  ○ Human Genetics (236000)
  ○ Internal Medicine (236999)
    ○ Administration (237000)
    ○ Allergy (237500)

Track: Instructional

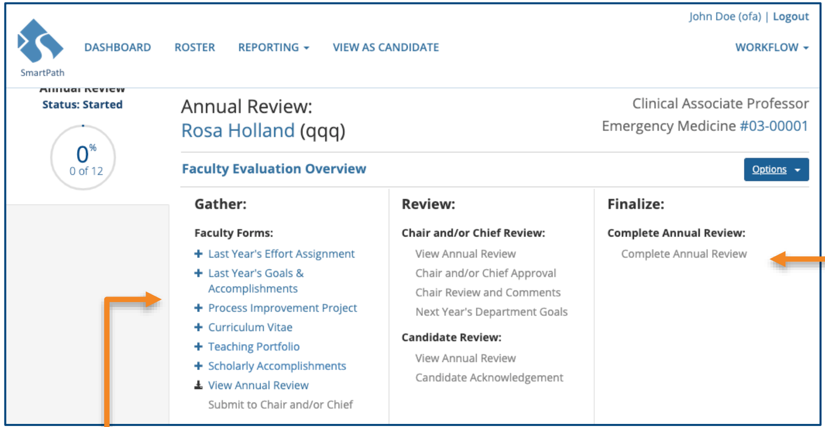
Title: Open

Create a new position and appointment

Enter key position/ appointment attributes

Workflow

Locking and unlocking steps



Annual Review
Status: Started

0%
0 of 12

Annual Review:
Rosa Holland (qqq)

Clinical Associate Professor
Emergency Medicine #03-00001

Faculty Evaluation Overview

Gather:

Faculty Forms:

- + Last Year's Effort Assignment
- + Last Year's Goals & Accomplishments
- + Process Improvement Project
- + Curriculum Vitae
- + Teaching Portfolio
- + Scholarly Accomplishments
- View Annual Review
- Submit to Chair and/or Chief

Review:

Chair and/or Chief Review:

- View Annual Review
- Chair and/or Chief Approval
- Chair Review and Comments
- Next Year's Department Goals

Candidate Review:

- View Annual Review
- Candidate Acknowledgement

Finalize:

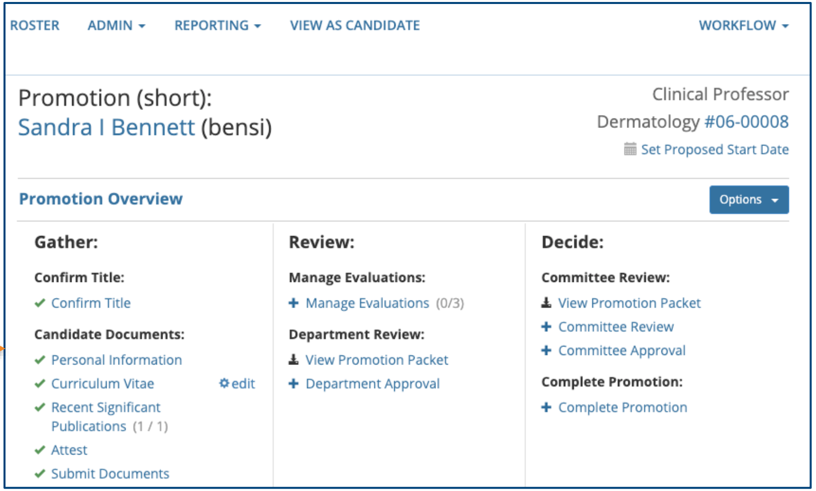
Complete Annual Review:

- Complete Annual Review

- The grayed-out steps in this workflow are not accessible until the prior steps are completed.
- Depending on your user role, there may be some steps that will always remain grayed-out.

- Blue steps are available to complete and edit.
- Depending on your user role, you may only have access to view the step and not edit.

- Green checkmarks indicate steps have been completed.
- Completing steps/sections will open up additional steps.



Promotion (short):
Sandra I Bennett (bensi)

Clinical Professor
Dermatology #06-00008
Set Proposed Start Date

Promotion Overview

Gather:

Confirm Title:

- ✓ Confirm Title

Candidate Documents:

- ✓ Personal Information
- ✓ Curriculum Vitae
- ✓ Recent Significant Publications (1 / 1)
- ✓ Attest
- ✓ Submit Documents

Review:

Manage Evaluations:

- + Manage Evaluations (0/3)

Department Review:

- View Promotion Packet
- + Department Approval

Decide:

Committee Review:

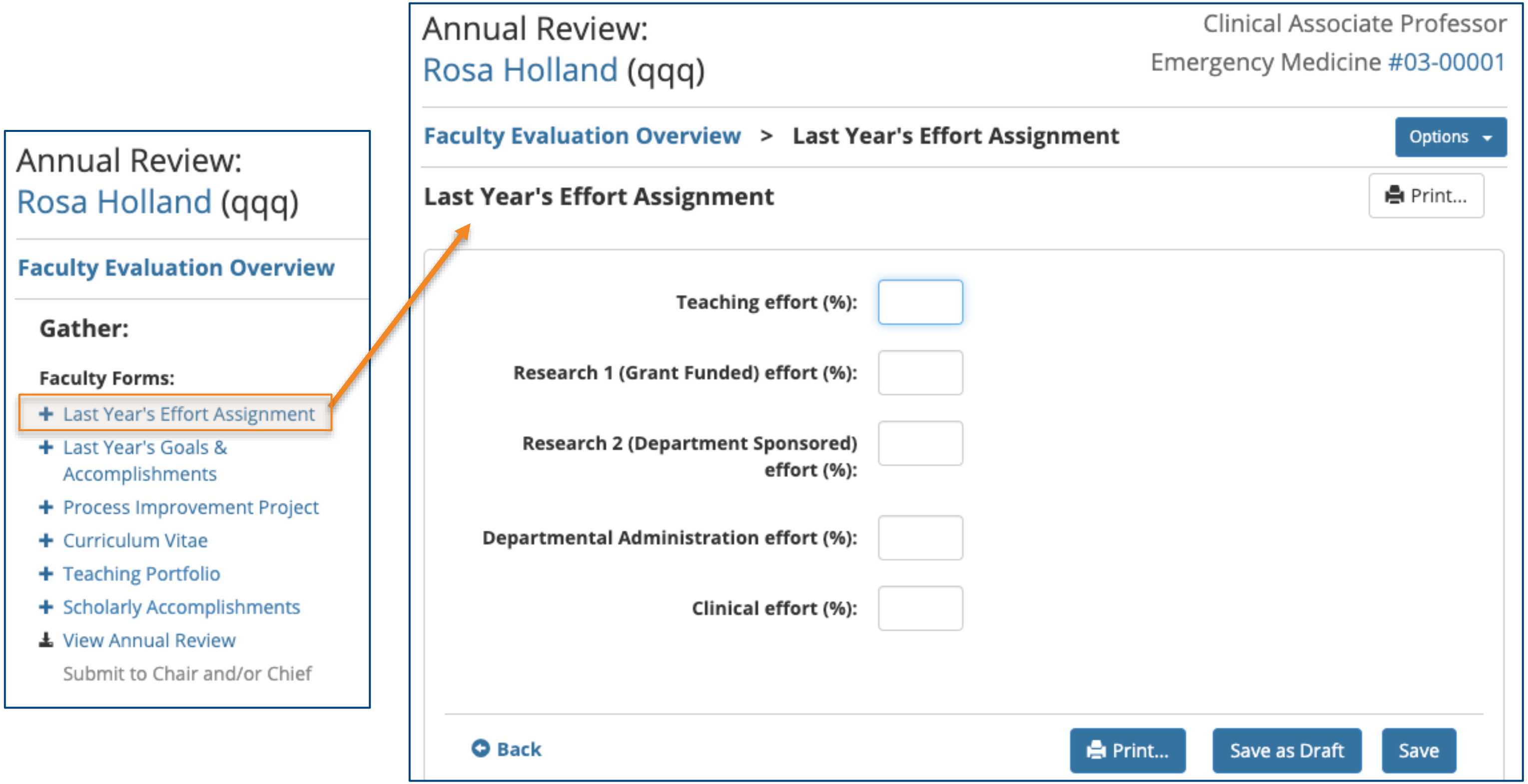
- View Promotion Packet
- + Committee Review
- + Committee Approval

Complete Promotion:

- + Complete Promotion

Workflow

SmartForms



Annual Review:
Rosa Holland (qqq)

Faculty Evaluation Overview

Gather:

Faculty Forms:

- Last Year's Effort Assignment
- Last Year's Goals & Accomplishments
- Process Improvement Project
- Curriculum Vitae
- Teaching Portfolio
- Scholarly Accomplishments
- View Annual Review
- Submit to Chair and/or Chief

Annual Review:
Rosa Holland (qqq)

Clinical Associate Professor
Emergency Medicine #03-00001

Faculty Evaluation Overview > Last Year's Effort Assignment

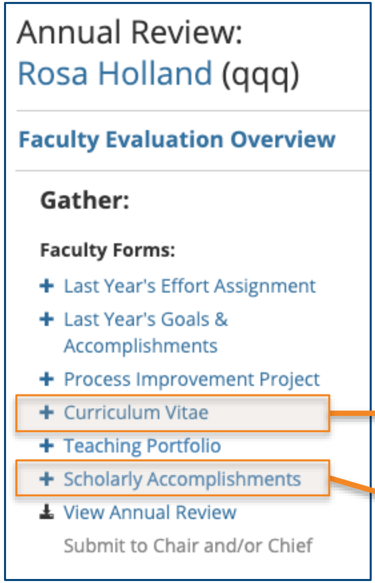
Last Year's Effort Assignment

Teaching effort (%):	
Research 1 (Grant Funded) effort (%):	
Research 2 (Department Sponsored) effort (%):	
Departmental Administration effort (%):	
Clinical effort (%):	

This step uses a SmartForm to capture required information.

Workflow

File Upload Step



Annual Review:
Rosa Holland (qqq)

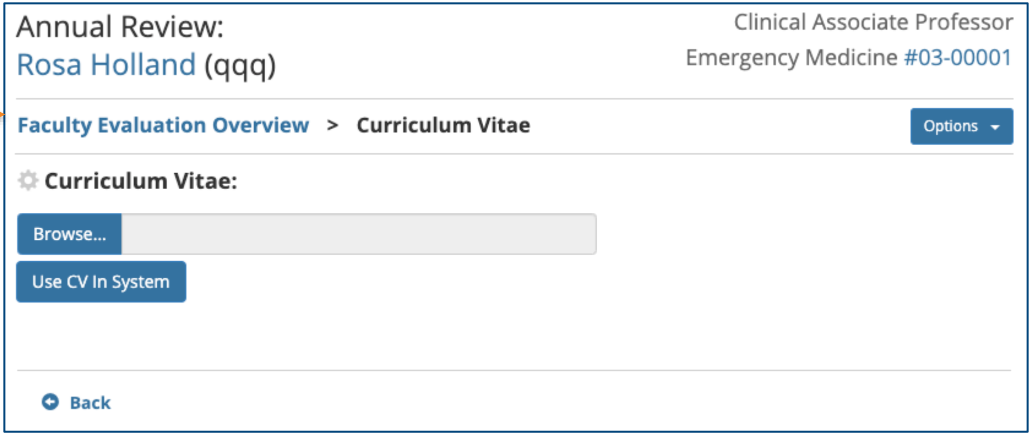
Faculty Evaluation Overview

Gather:

Faculty Forms:

- Last Year's Effort Assignment
- Last Year's Goals & Accomplishments
- Process Improvement Project
- Curriculum Vitae
- Teaching Portfolio
- Scholarly Accomplishments
- View Annual Review

Submit to Chair and/or Chief



Annual Review:
Rosa Holland (qqq)

Clinical Associate Professor
Emergency Medicine #03-00001

Faculty Evaluation Overview > Curriculum Vitae

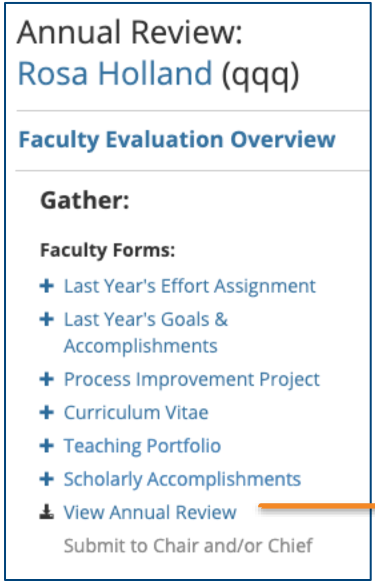
Curriculum Vitae:

- You can upload a CV by browsing files on your computer.
- If you use SmartPath CV, you may have the option to retrieve that CV in the system.

- This File Upload step opens a window to browse and retrieve a file from your computer.
- You must upload a PDF file, unless otherwise stated.
- Once the file is uploaded into SmartPath, there is no additional action you need to take.
- To get back to the workflow, click on the blue Overview link underneath the candidate's name, or the back button at the bottom of the page.

Workflow

View Packet Step



Annual Review:
Rosa Holland (qqq)

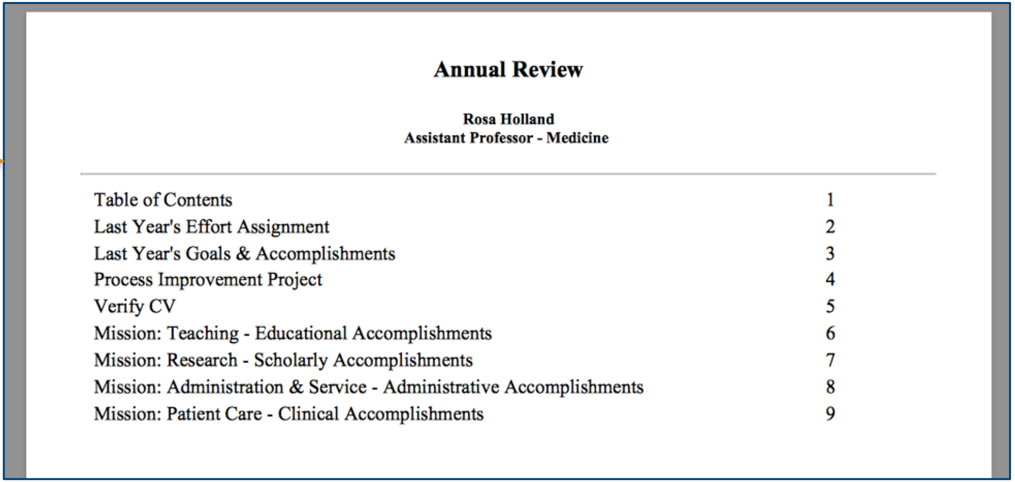
Faculty Evaluation Overview

Gather:

Faculty Forms:

- Last Year's Effort Assignment
- Last Year's Goals & Accomplishments
- Process Improvement Project
- Curriculum Vitae
- Teaching Portfolio
- Scholarly Accomplishments
- View Annual Review

Submit to Chair and/or Chief



Annual Review

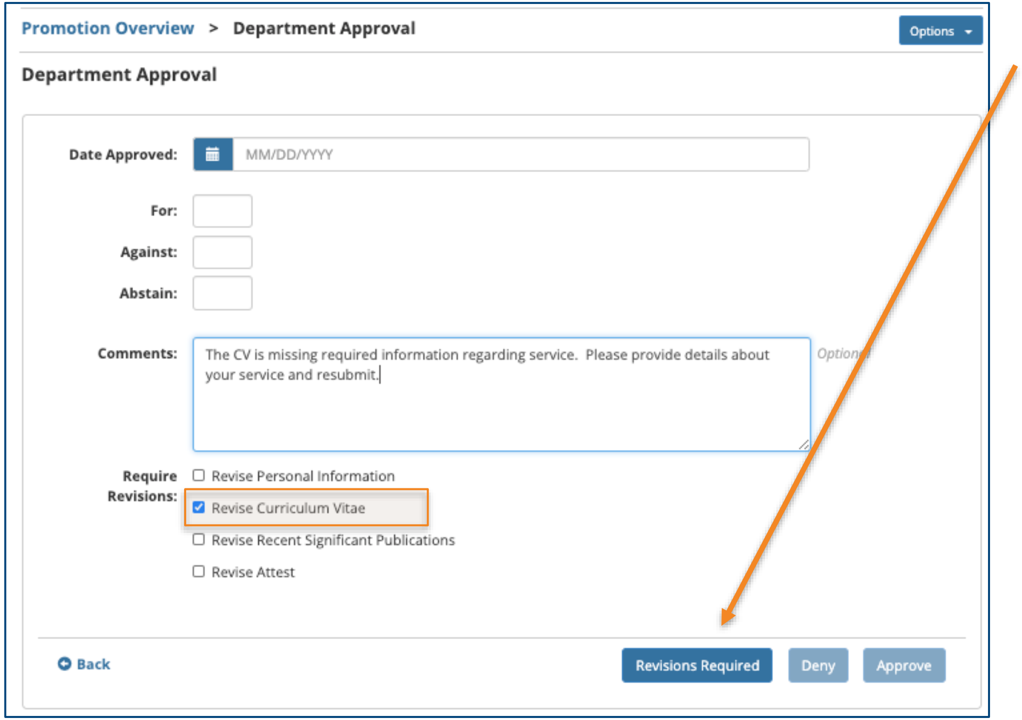
Rosa Holland
Assistant Professor - Medicine

Table of Contents 1
Last Year's Effort Assignment 2
Last Year's Goals & Accomplishments 3
Process Improvement Project 4
Verify CV 5
Mission: Teaching - Educational Accomplishments 6
Mission: Research - Scholarly Accomplishments 7
Mission: Administration & Service - Administrative Accomplishments 8
Mission: Patient Care - Clinical Accomplishments 9

Packets are built from previously uploaded PDFs and information entered into SmartForms.

Workflow

Requesting Revisions



Department Approval

Date Approved: MM/DD/YYYY

For:

Against:

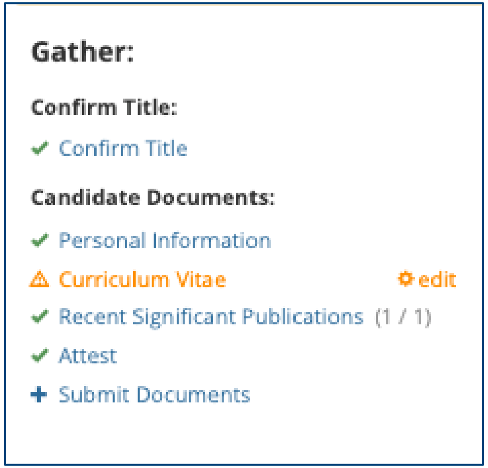
Abstain:

Comments: The CV is missing required information regarding service. Please provide details about your service and resubmit.

Optional

Require Revisions:
- ☐ Revise Personal Information
- ☑ Revise Curriculum Vitae
- ☐ Revise Recent Significant Publications
- ☐ Revise Attest

- When a revision is required, the selected step(s) are unlocked for corrections and the appropriate users are emailed.
- The unlocked steps are displayed in orange and any comments are displayed at the top of the screen.



Gather:

Confirm Title:

✓ Confirm Title

Candidate Documents:

✓ Personal Information

⚠ Curriculum Vitae ⚙ edit

✓ Recent Significant Publications (1 / 1)

✓ Attest

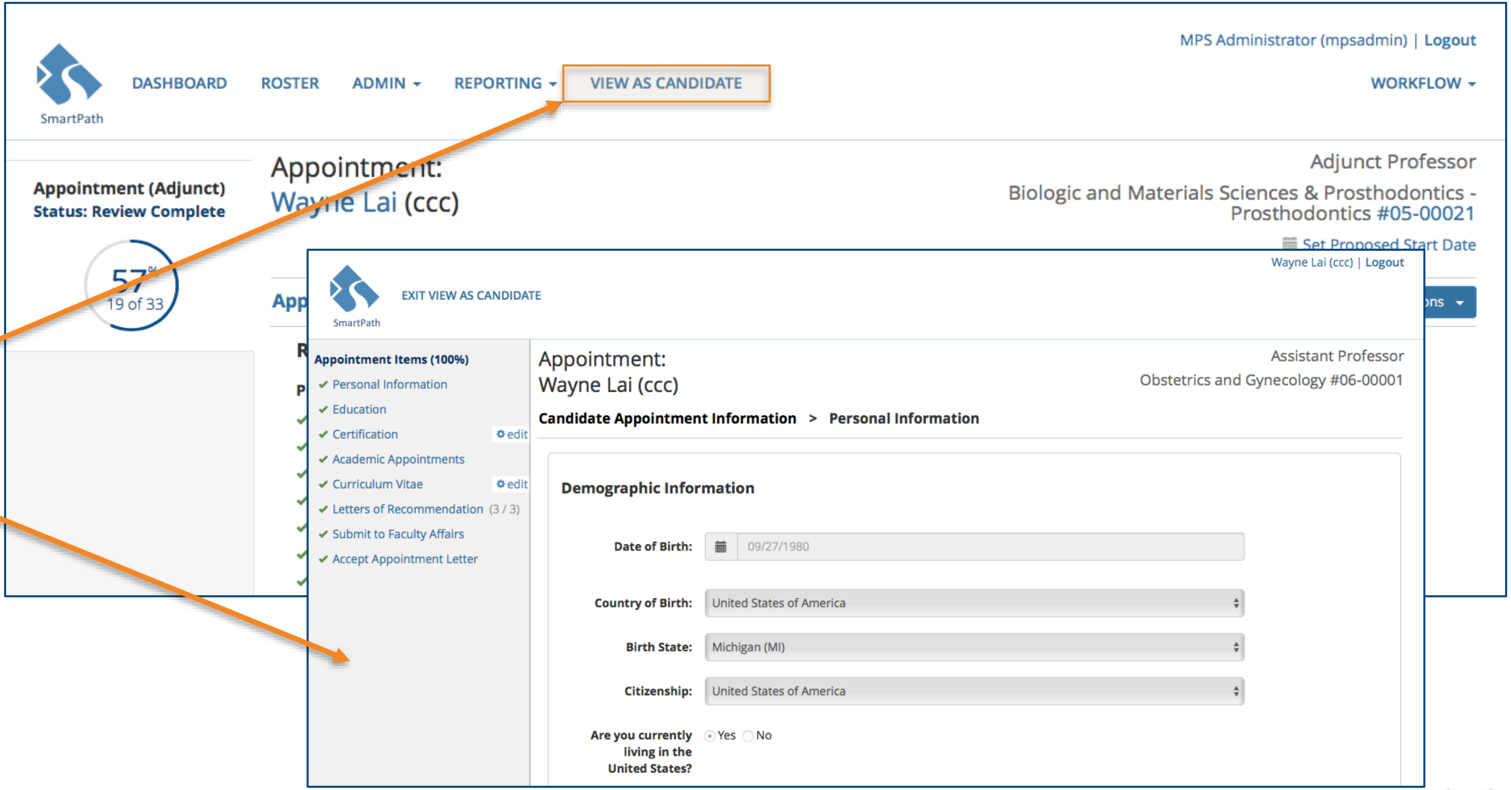
+ Submit Documents

- Once corrections are made and resubmitted, the packet will move through the approval process again.

Workflow

View as Candidate

- There may be circumstances where it is helpful to view a workflow from the Candidate’s perspective.
- Click ‘View As Candidate’ to see what the candidate sees
- You are not allowed to complete any of the workflow steps from this view.


SmartPath
DASHBOARD
ROSTER
ADMIN
REPORTING
VIEW AS CANDIDATE
WORKFLOW
MPS Administrator (mpsadmin) | Logout
EXIT VIEW AS CANDIDATE
Wayne Lai (ccc) | Logout

Appointment (Adjunct)
Status: Review Complete

57%
19 of 33

Appointment:
Wayne Lai (ccc)

Adjunct Professor
Biologic and Materials Sciences & Prosthodontics - Prosthodontics #05-00021

Set Proposed Start Date

Appointment Items (100%)
- ✓ Personal Information
- ✓ Education
- ✓ Certification edit
- ✓ Academic Appointments
- ✓ Curriculum Vitae edit
- ✓ Letters of Recommendation (3 / 3)
- ✓ Submit to Faculty Affairs
- ✓ Accept Appointment Letter

Appointment:
Wayne Lai (ccc)

Assistant Professor
Obstetrics and Gynecology #06-00001

Candidate Appointment Information > Personal Information

Demographic Information

Date of Birth: 09/27/1980

Country of Birth: United States of America

Birth State: Michigan (MI)

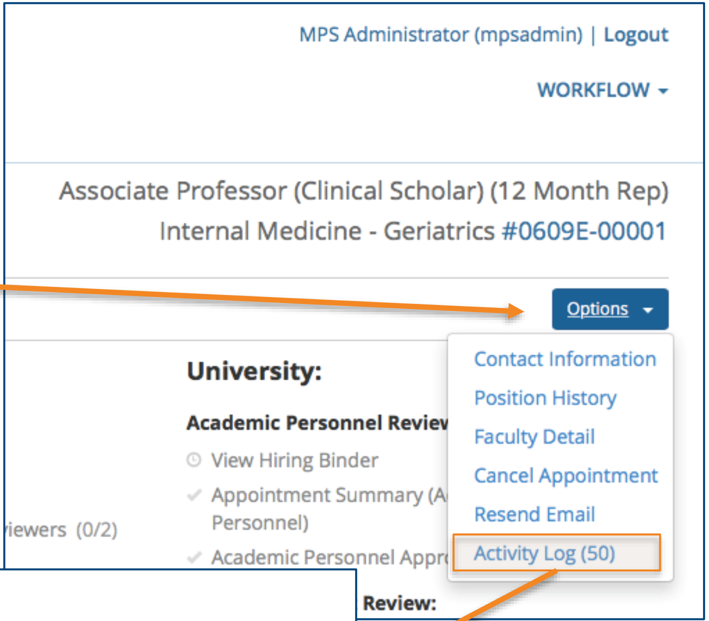
Citizenship: United States of America

Are you currently living in the United States? ● Yes ○ No

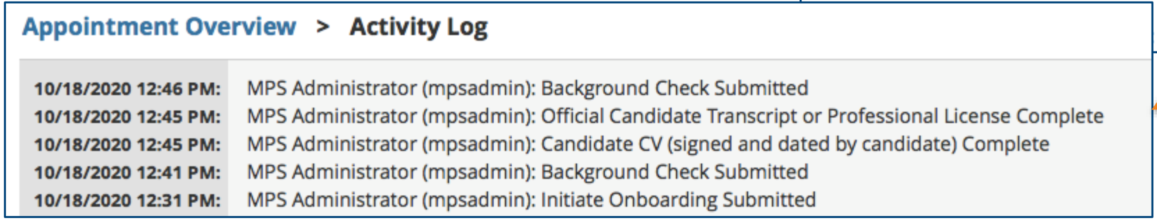
Workflow

Activity Log

- SmartPath keeps a log of all activity pertaining to an individual's workflow.
- To view the Activity Log, click on the blue "Options" button on the right side of your screen and choose "Activity Log."
- The Activity Log will show you **who** completed **what** step and **when**.


MPS Administrator (mpsadmin) | Logout
WORKFLOW
Options
Contact Information
Position History
Faculty Detail
Cancel Appointment
Resend Email
Activity Log (50)
University:
Academic Personnel Review
View Hiring Binder
Appointment Summary (A Personnel)
Academic Personnel Appr
iewers (0/2)
Review:

Associate Professor (Clinical Scholar) (12 Month Rep)
Internal Medicine - Geriatrics #0609E-00001



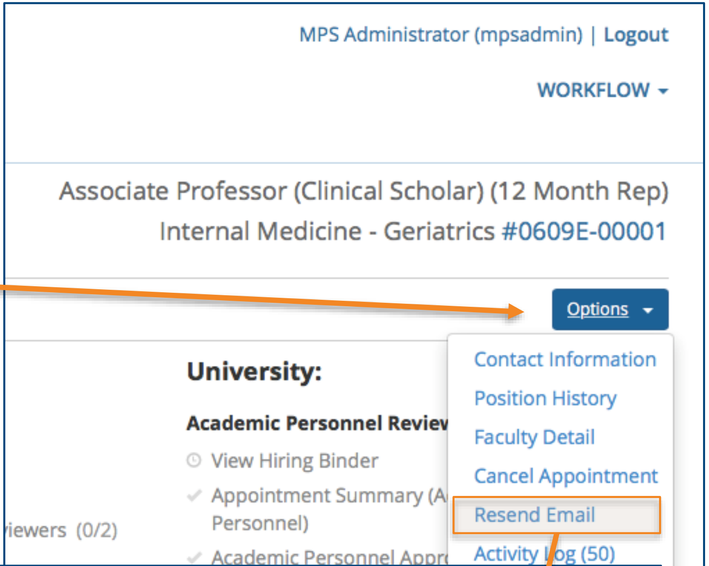
Appointment Overview > **Activity Log**

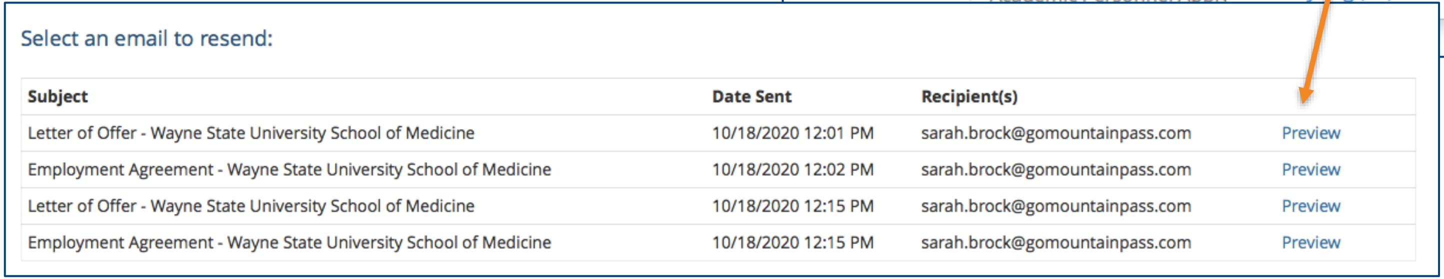
```
10/18/2020 12:46 PM:  MPS Administrator (mpsadmin): Background Check Submitted
10/18/2020 12:45 PM:  MPS Administrator (mpsadmin): Official Candidate Transcript or Professional License Complete
10/18/2020 12:45 PM:  MPS Administrator (mpsadmin): Candidate CV (signed and dated by candidate) Complete
10/18/2020 12:41 PM:  MPS Administrator (mpsadmin): Background Check Submitted
10/18/2020 12:31 PM:  MPS Administrator (mpsadmin): Initiate Onboarding Submitted
```

Workflow

Resend Email

- SmartPath keeps a log of all emails that have been sent out pertaining to an individual’s workflow.
- To view sent emails, click on the blue “Options” button on the right side of your screen and choose “Resend Email.”
- The Resend Email page will list all emails that have been sent. Clicking “Preview” will display the sent email and you have the option to resend that same email by clicking the blue “Resend” button at the bottom of the page.


MPS Administrator (mpsadmin) | Logout
WORKFLOW
Associate Professor (Clinical Scholar) (12 Month Rep)
Internal Medicine - Geriatrics #0609E-00001
Options
University:
Academic Personnel Reviev
View Hiring Binder
Appointment Summary (A
Personnel)
iewers (0/2)
Academic Personnel Appr
Contact Information
Position History
Faculty Detail
Cancel Appointment
Resend Email
Activity Log (50)



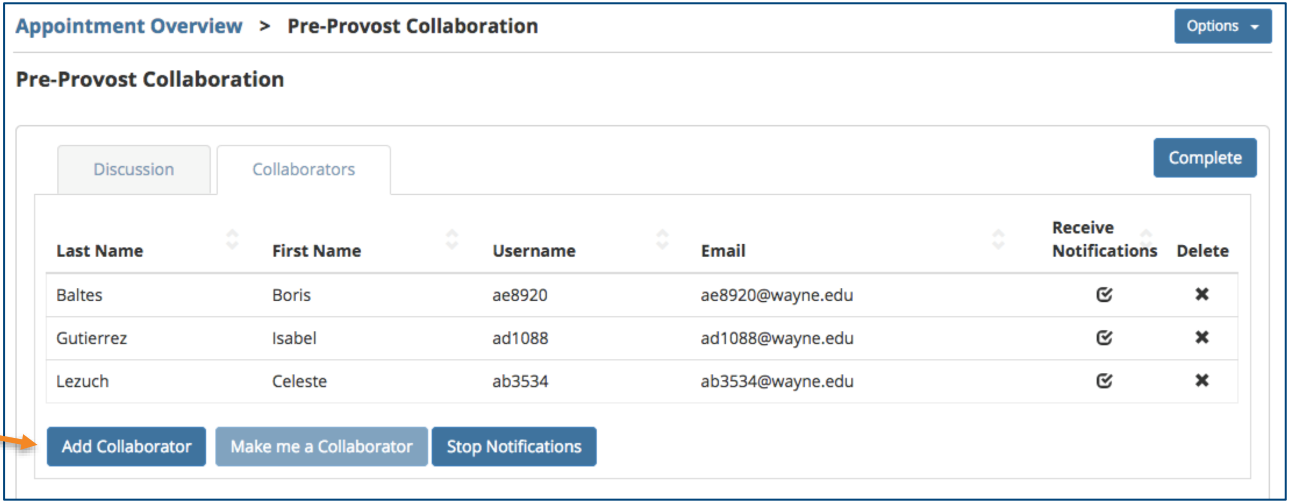
Select an email to resend:

Subject	Date Sent	Recipient(s)	
Letter of Offer - Wayne State University School of Medicine	10/18/2020 12:01 PM	sarah.brock@gomountainpass.com	Preview
Employment Agreement - Wayne State University School of Medicine	10/18/2020 12:02 PM	sarah.brock@gomountainpass.com	Preview
Letter of Offer - Wayne State University School of Medicine	10/18/2020 12:15 PM	sarah.brock@gomountainpass.com	Preview
Employment Agreement - Wayne State University School of Medicine	10/18/2020 12:15 PM	sarah.brock@gomountainpass.com	Preview

Workflow

Collaboration

- The Collaborators tab shows you everyone who will receive email notifications when comments are added.
- Individuals can be set up as initial collaborators.
- Additional people can be added by clicking "Add Collaborator."


Options
Complete
Discussion
Collaborators
Add Collaborator
Make me a Collaborator
Stop Notifications

Appointment Overview > **Pre-Provost Collaboration**

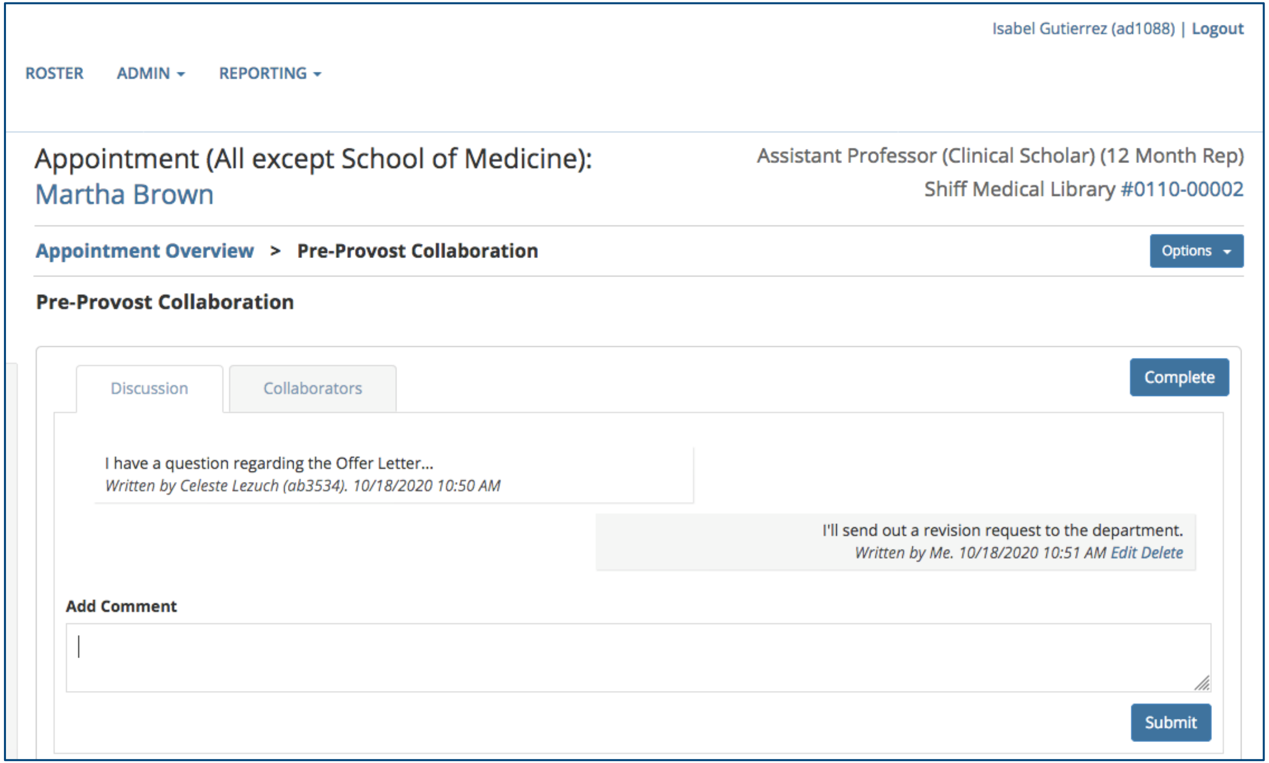
Pre-Provost Collaboration

Last Name	First Name	Username	Email	Receive Notifications	Delete
Baltes	Boris	ae8920	ae8920@wayne.edu	✓	✖
Gutierrez	Isabel	ad1088	ad1088@wayne.edu	✓	✖
Lezuch	Celeste	ab3534	ab3534@wayne.edu	✓	✖

Workflow

Collaboration

- The Discussion tab allows all collaborators to add questions and comments.
- The display is similar to what you see when you text someone on a smartphone. Your comments are displayed on the right, and everyone else's comments are displayed on the left.
- You can see who wrote each comment and when they added it.
- You can add new comments at the bottom (and be sure to click 'Submit!').


Isabel Gutierrez (ad1088) | Logout
ROSTER
ADMIN
REPORTING

Appointment (All except School of Medicine): Martha Brown

Assistant Professor (Clinical Scholar) (12 Month Rep)
Shiff Medical Library #0110-00002

Appointment Overview > Pre-Provost Collaboration
Options

Pre-Provost Collaboration

Discussion
Collaborators
Complete

I have a question regarding the Offer Letter...
Written by Celeste Lezuch (ab3534). 10/18/2020 10:50 AM

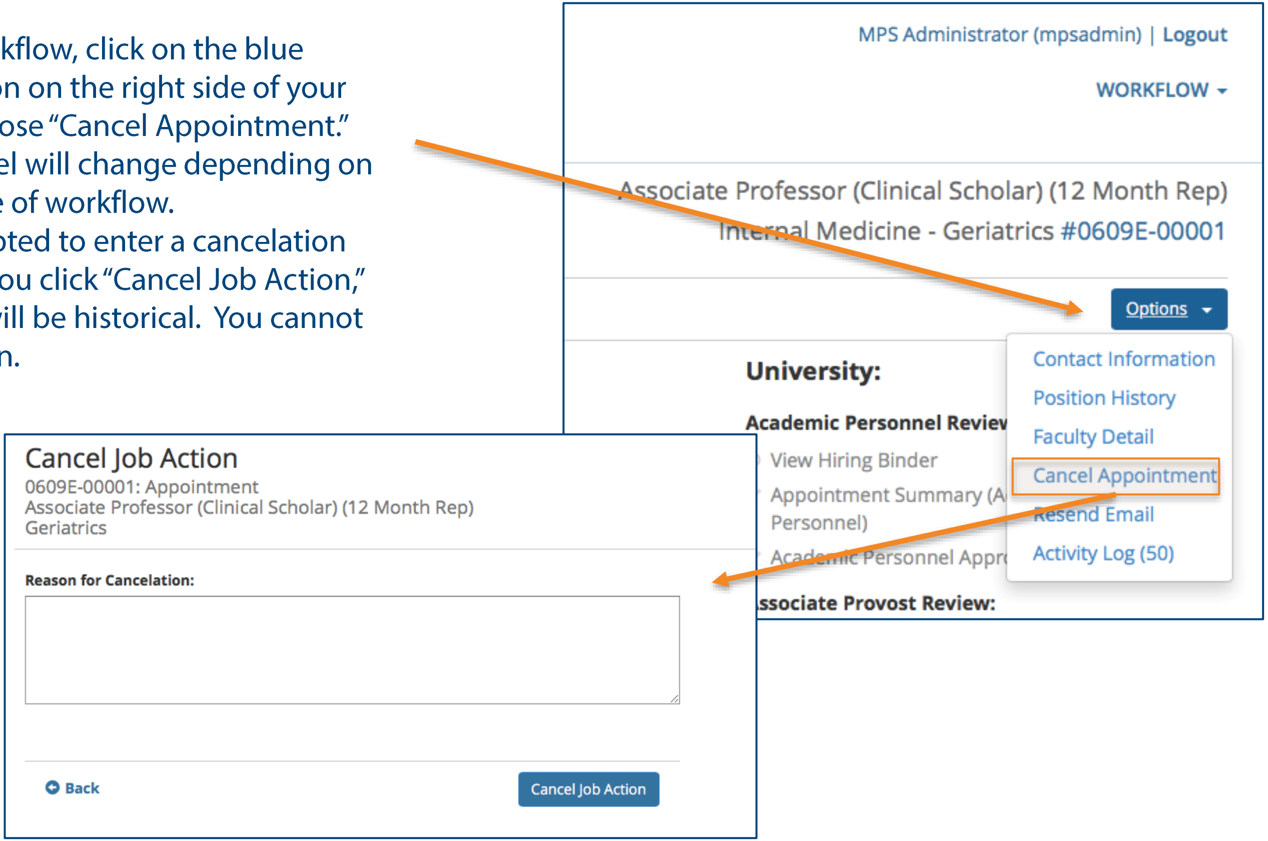
I'll send out a revision request to the department.
Written by Me. 10/18/2020 10:51 AM Edit Delete

Add Comment

Workflow

Canceling a Workflow

- To cancel a workflow, click on the blue "Options" button on the right side of your screen and choose "Cancel Appointment."
    - This label will change depending on the type of workflow.
- You'll be prompted to enter a cancelation reason. Once you click "Cancel Job Action," the workflow will be historical. You cannot undo this action.



MPS Administrator (mpsadmin) | **Logout**

WORKFLOW ▾

Associate Professor (Clinical Scholar) (12 Month Rep)
Internal Medicine - Geriatrics #0609E-00001

Options ▾

- Contact Information
- Position History
- Faculty Detail
- Cancel Appointment
- Resend Email
- Activity Log (50)

University:

Academic Personnel Review

View Hiring Binder

Appointment Summary (A… Personnel)

Academic Personnel Appr…

…ssociate Provost Review:

Cancel Job Action

0609E-00001: Appointment
Associate Professor (Clinical Scholar) (12 Month Rep)
Geriatrics

Reason for Cancelation:

Back

Cancel Job Action

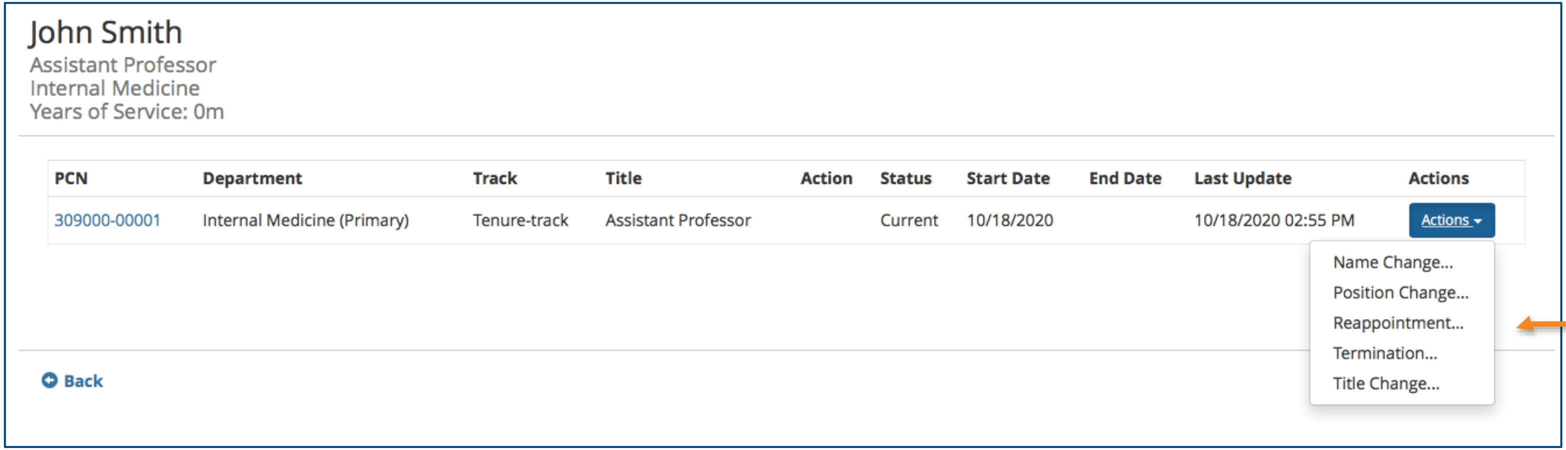
Maintaining the SmartPath Roster

Workflows to Maintain the Roster

- Position Change = change someone's department
- Title Change = change someone's title
- Termination = remove someone from roster
    - Terminating creates a vacant position on the SmartPath roster, but this does not mean the position is available to be filled based on your university's policies.
    - To fix incorrect start and end dates on the Roster, contact your SmartPath representative in your school

- To initiate one of these workflows, click on a faculty member's name on the Roster, which will show you their position history. Click the blue "Actions" dropdown and choose a workflow to initiate.

- Depending on your role, you may not have access to some of these workflows.



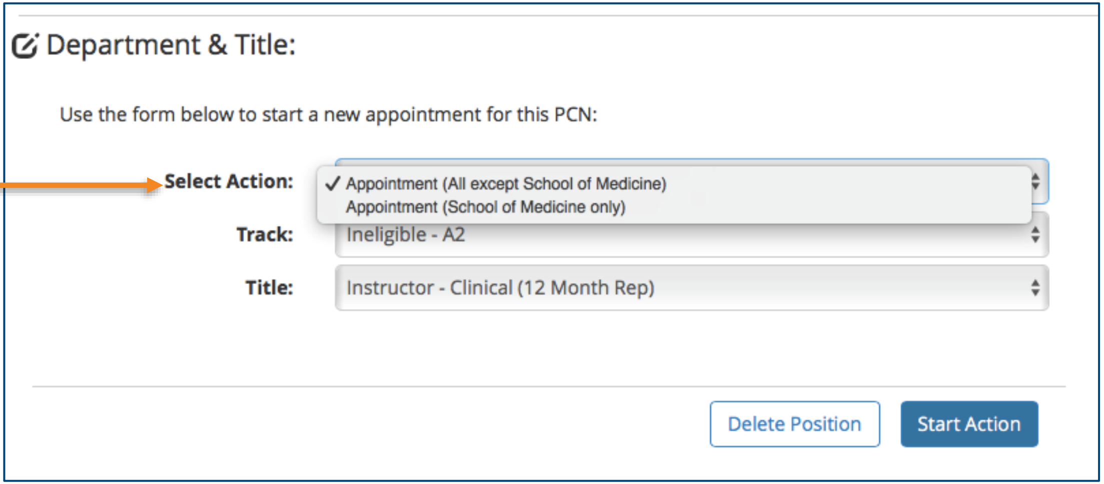
John Smith
Assistant Professor
Internal Medicine
Years of Service: 0m

PCN	Department	Track	Title	Action	Status	Start Date	End Date	Last Update	Actions
309000-00001	Internal Medicine (Primary)	Tenure-track	Assistant Professor		Current	10/18/2020		10/18/2020 02:55 PM	Actions ▾

WSU Appointment Workflow:
For Departments, BAOs, HR, Faculty Affairs

Launching an Appointment workflow

- SmartPath Appointment starts after a final candidate has been identified.
- From the Roster, select "Create New Position" to launch a new appointment workflow.
- When starting a new appointment workflow, be mindful of selecting the correct type of Appointment workflow.



Department & Title:

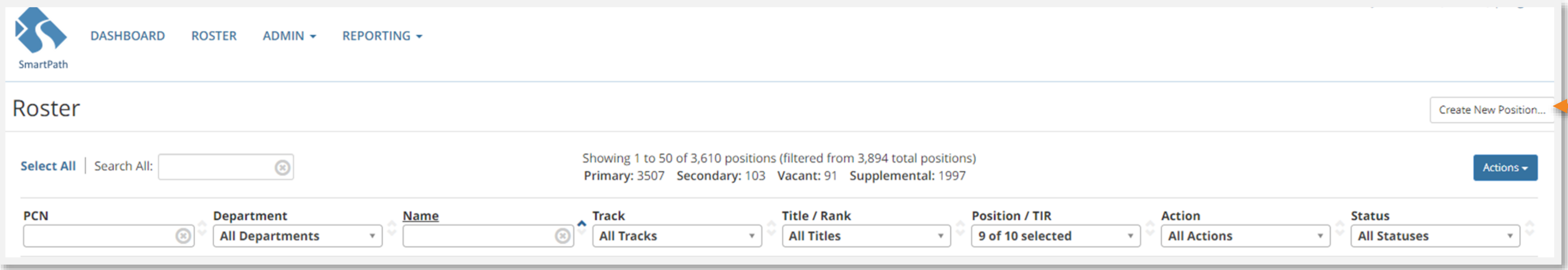
Use the form below to start a new appointment for this PCN:

Select Action: ✓ Appointment (All except School of Medicine)

Track: Ineligible - A2

Title: Instructor - Clinical (12 Month Rep)

Appointment (School of Medicine only)
Delete Position
Start Action



SmartPath
DASHBOARD
ROSTER
ADMIN
REPORTING
Create New Position...
Select All
Search All:
Actions

Roster

Showing 1 to 50 of 3,610 positions (filtered from 3,894 total positions)
Primary: 3507 **Secondary:** 103 **Vacant:** 91 **Supplemental:** 1997

PCN	Department	Name	Track	Title / Rank	Position / TIR	Action	Status
	All Departments		All Tracks	All Titles	9 of 10 selected	All Actions	All Statuses

Guest AccessID

- The WSU Guest AccessID will be set up at the beginning of the Appointment process in order for the candidate to receive and accept their Letter of Offer and Employment Agreement via SmartPath later on.

- The process for requesting a WSU Guest AccessID will remain outside of SmartPath. However, there are a few differences when filling out the request form.

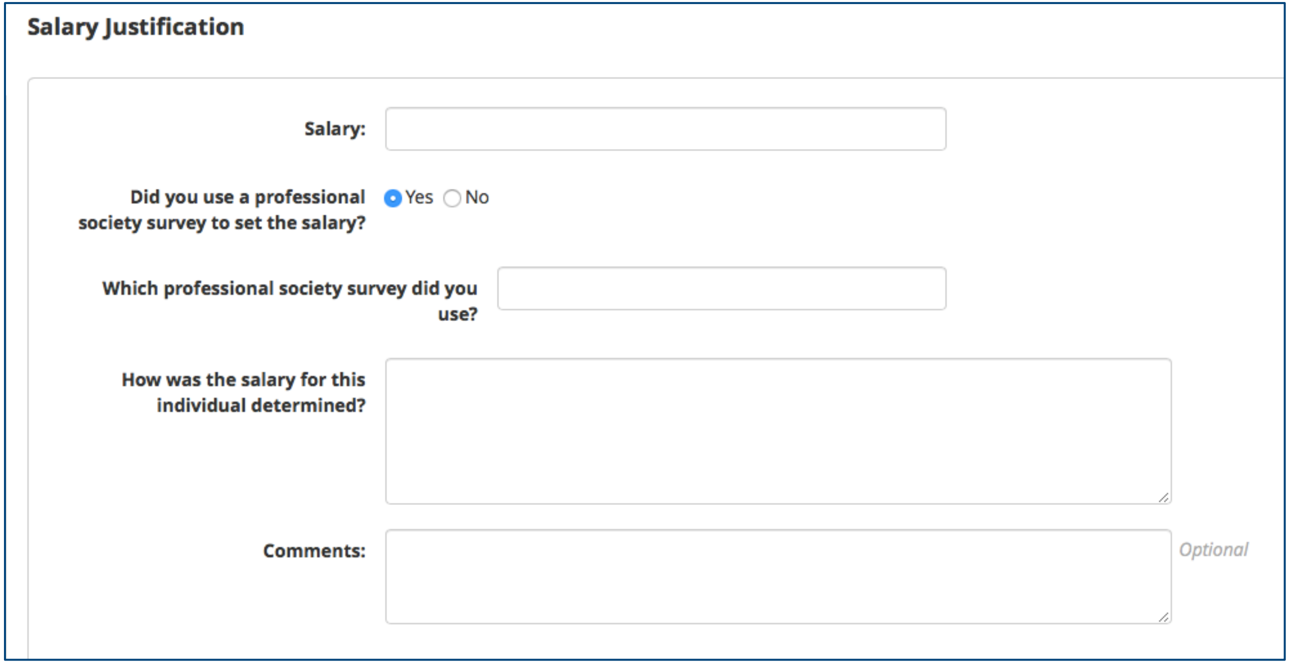
  1. When filling out the request form, please provide the actual Month and Date of the Guest's birthday and use place holder **1901** for the year of birth; in the "Reason for request" text field, please specify the below so the HelpDesk has the context and will use the Month and Date for duplicate ID check only:
     - **"This request is for pre-employment type Guest Access ID creation for the Faculty Hiring process (SmartPath). Year of birth can't be provided here for the concerns around age discrimination, etc."**
     - **After this sentence, please type "The candidate's outside email is (XXX)." and enter the candidate's outside email. For example, "JohnDoe@gmail.com"**

  1. C&IT determined that the regional HR manager/consultant should be the one that raise the Guest ID account request. (This requirement is because HR managers/consultants are the ones who will onboard the new hires, and they need to be aware and ensure the actual DOB of mm/dd/yyyy will be entered into your system later)
     a. New faculty hires requiring a password reset to access SmartPath can get stuck in a loop after their guest accessID has been created before they officially become employees. If you encounter a new faculty hire that needs to have their password reset to be able to accept their letter of offer in SmartPath, please instruct them to say their birth year is 1901, when C&IT asks for their birthdate. It will also help C&IT verify their identity if you provide the new faculty hire with their accessID and Banner ID, prior to them calling the helpdesk for a password reset.

  2. The regional HR manager/consultant must provide the actual DOB (mm/dd/yyyy) when onboarding the new hire (i.e. process the new hire EPAF).

Salary Justification

The Salary Justification is a requirement for the Provost's Office binder.



Salary Justification

Salary:

Did you use a professional society survey to set the salary? ● Yes ○ No

Which professional society survey did you use?

How was the salary for this individual determined?

Comments: *Optional*

Letter of Offer and Employment Agreement

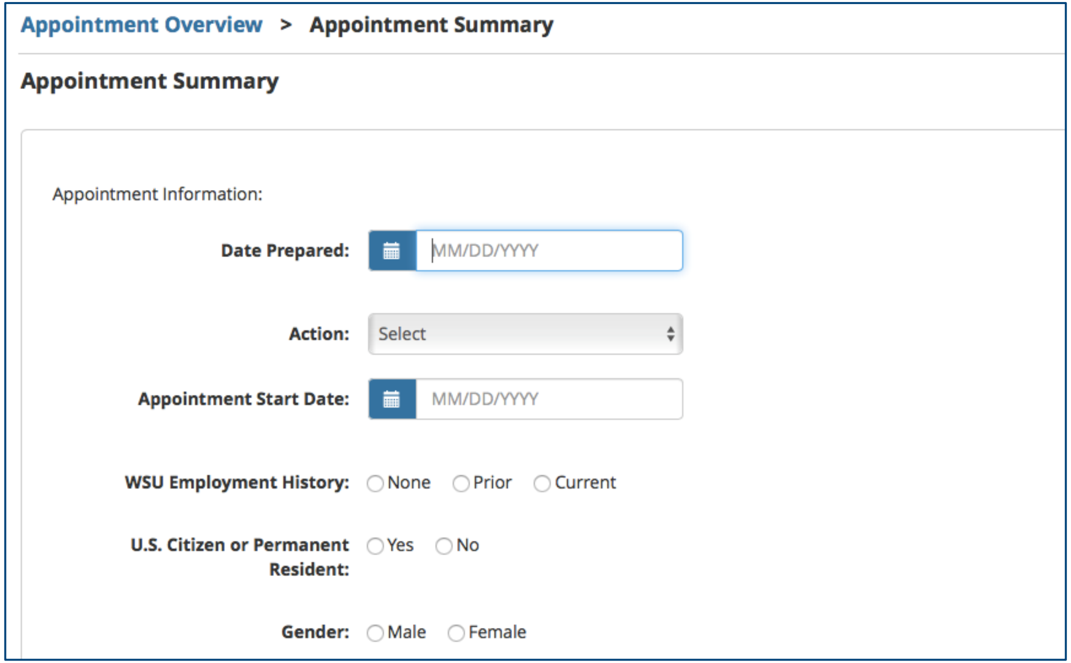
- **Policy change for signatures:**
  - As approved by the Office of General Counsel and Provost's Office, the Provost will no longer be signing the Letter of Offer. Each school and college will need to set up their own policy for who will sign the final Letter of Offer. This could be the dean and/or the department chair.

- For schools and colleges that **do not** have a SmartPath generated Letter of Offer and Employment Agreement:
  - You will upload a signed Letter of Offer and Employment Agreement based on the Provost's Office templates.
  - You will need to upload a Word doc and PDF version of the signed Letter of Offer and Employment Agreement.

- For schools and colleges that **do** have a SmartPath generated Letter of Offer and Employment Agreement:
  - You will need to complete the "Letter of Offer Form" with information pertaining to the candidate.
  - To confirm and add the Letter of Offer and Employment Agreement to the binder, you must complete the "Letter of Offer Review" and "Employment Agreement Review" steps. To complete these steps, you will need to click "Send" at the bottom of the page, but the Letter of Offer and Employment Agreement will not be emailed to anyone.

Appointment Summary

- The Appointment Summary is now a SmartForm instead of an Excel spreadsheet.
- Once you fill out the form and click "Save," this information will automatically be added to the binder.



Appointment Overview > Appointment Summary

Appointment Summary

Appointment Information:

Date Prepared: MM/DD/YYYY

Action: Select

Appointment Start Date: MM/DD/YYYY

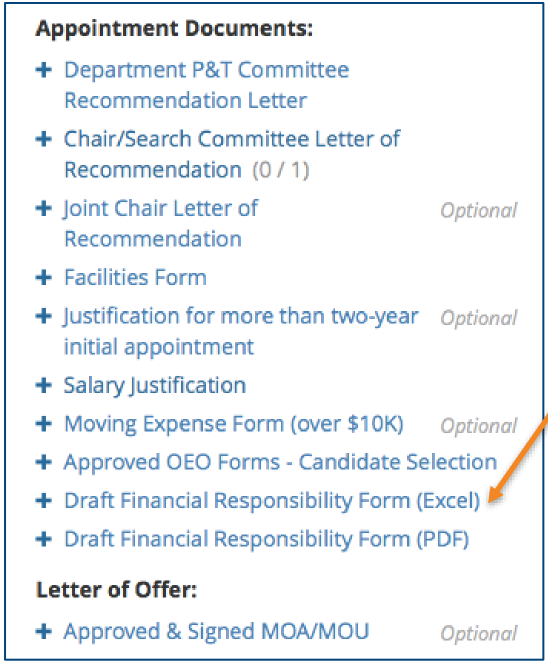
WSU Employment History: ○ None ○ Prior ○ Current

U.S. Citizen or Permanent Resident: ○ Yes ○ No

Gender: ○ Male ○ Female

BAO Review

Financial Responsibility Form (FRF)



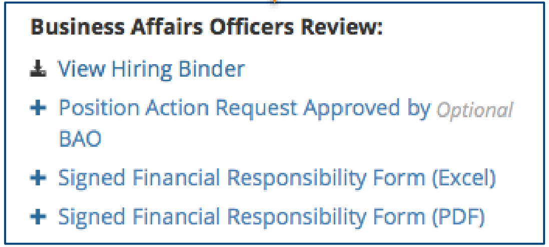
Appointment Documents:

- ✚ Department P&T Committee Recommendation Letter
- ✚ Chair/Search Committee Letter of Recommendation (0 / 1)
- ✚ Joint Chair Letter of Recommendation *Optional*
- ✚ Facilities Form
- ✚ Justification for more than two-year initial appointment *Optional*
- ✚ Salary Justification
- ✚ Moving Expense Form (over $10K) *Optional*
- ✚ Approved OEO Forms - Candidate Selection
- ✚ Draft Financial Responsibility Form (Excel)
- ✚ Draft Financial Responsibility Form (PDF)

Letter of Offer:

- ✚ Approved & Signed MOA/MOU *Optional*

- If your school/college has a draft FRF prepared, the BAO can download this Excel spreadsheet by clicking on the link in the first column of the workflow.
- Once the BAO has finalized the FRF and obtained signatures, they will upload both an Excel and PDF copy.

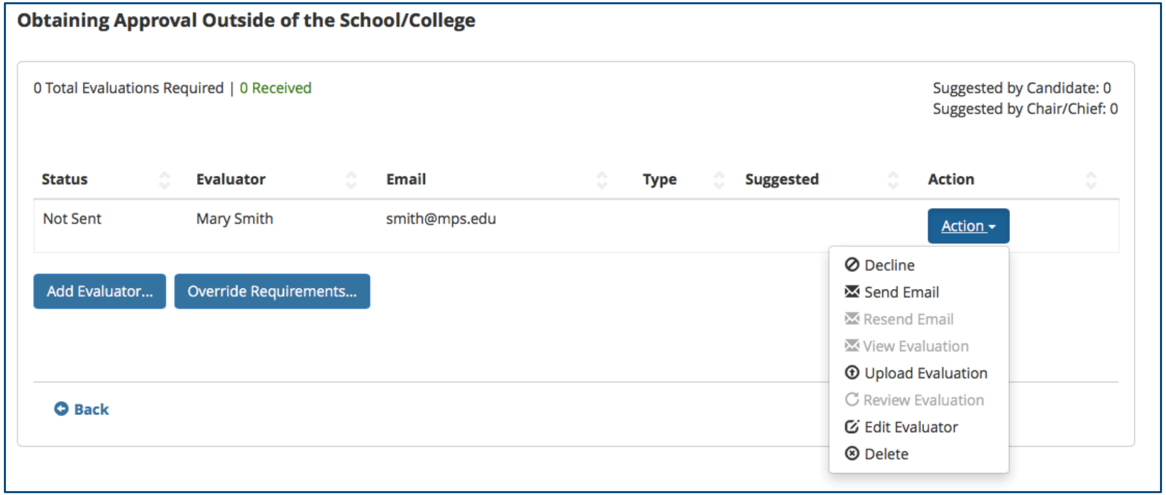


Business Affairs Officers Review:

- View Hiring Binder
- ✚ Position Action Request Approved by BAO *Optional*
- ✚ Signed Financial Responsibility Form (Excel)
- ✚ Signed Financial Responsibility Form (PDF)

Obtaining Approval Outside of the School/College

- When a school is processing a joint appointment and the dean or director of another school needs to review the binder, this step allows for this outside approval.
- They will receive an email with a link to the hiring binder and a link to upload their recommendation.
- The recommendation will be added to the hiring binder.



Obtaining Approval Outside of the School/College

0 Total Evaluations Required | 0 Received

Suggested by Candidate: 0
Suggested by Chair/Chief: 0

Status	Evaluator	Email	Type	Suggested	Action
Not Sent	Mary Smith	smith@mps.edu			Action

Decline
Send Email
Resend Email
View Evaluation
Upload Evaluation
Review Evaluation
Edit Evaluator
Delete
Add Evaluator...
Override Requirements...
Back

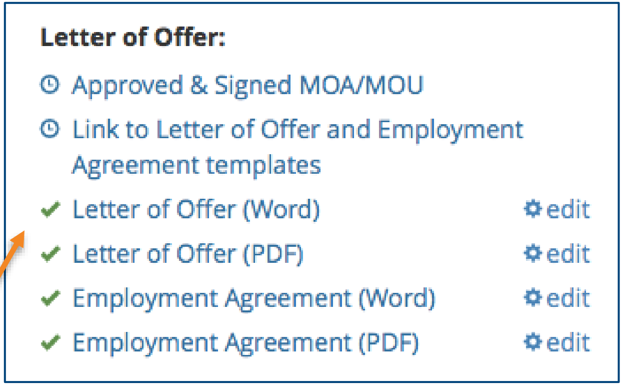
Final Letter of Offer and Employment Agreement

Policy change for signatures:

- As approved by the Office of General Counsel and Provost's Office, the Provost will no longer be signing the Letter of Offer. Each school and college will need to set up their own policy for who will sign the final Letter of Offer. This could be the dean and/or the department chair.

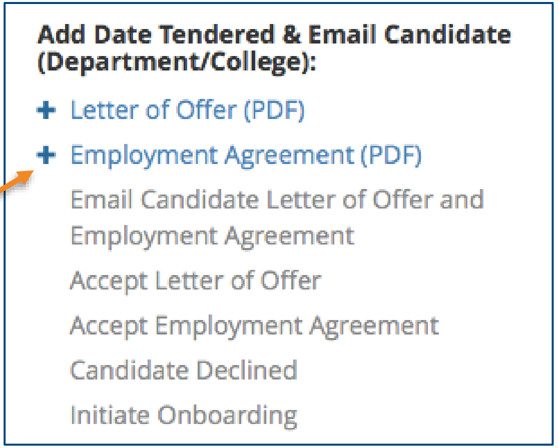
For schools and colleges that do not have a SmartPath generated Letter of Offer and Employment Agreement:

- You will receive an email with a link to SmartPath when it's time for you send the Letter of Offer and Employment Agreement to the candidate.
- You will need to download the Word version of the Letter of Offer that was uploaded in the first column, add the date tendered, and upload the final PDF version in the third column. This final PDF is what the candidate will receive.
  - Same process applies to the Employment Agreement.



Letter of Offer:

- 🕓 Approved & Signed MOA/MOU
- 🕓 Link to Letter of Offer and Employment Agreement templates
- ✓ Letter of Offer (Word) ⚙edit
- ✓ Letter of Offer (PDF) ⚙edit
- ✓ Employment Agreement (Word) ⚙edit
- ✓ Employment Agreement (PDF) ⚙edit



Add Date Tendered & Email Candidate (Department/College):

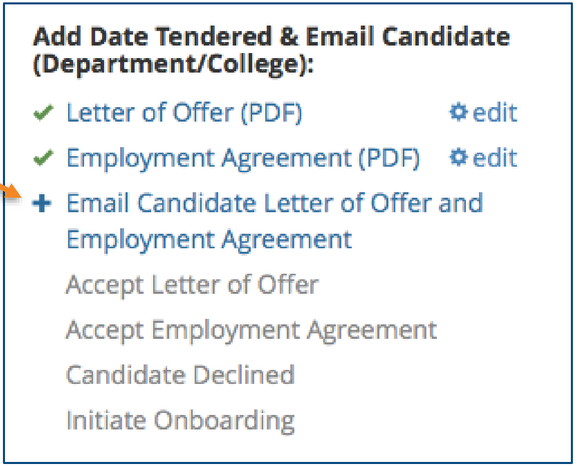
- + Letter of Offer (PDF)
- + Employment Agreement (PDF)
- Email Candidate Letter of Offer and Employment Agreement
- Accept Letter of Offer
- Accept Employment Agreement
- Candidate Declined
- Initiate Onboarding

Final Letter of Offer and Employment Agreement

For schools and colleges that **do not** have a SmartPath generated Letter of Offer and Employment Agreement:

- After uploading the final PDFs, you will email the candidate notifying them that there is a Letter of Offer and Employment Agreement ready for them to review.
- The "Accept" steps are for the candidate to complete.
- To see what the candidate sees, click on "View As Candidate" in the top menu bar.

- **Please note:** You will initiate Onboarding only after the candidate has accepted both the Letter of Offer and the Employment Agreement.



Add Date Tendered & Email Candidate (Department/College):

✓ Letter of Offer (PDF) ⚙ edit

✓ Employment Agreement (PDF) ⚙ edit

+ Email Candidate Letter of Offer and Employment Agreement

Accept Letter of Offer

Accept Employment Agreement

Candidate Declined

Initiate Onboarding

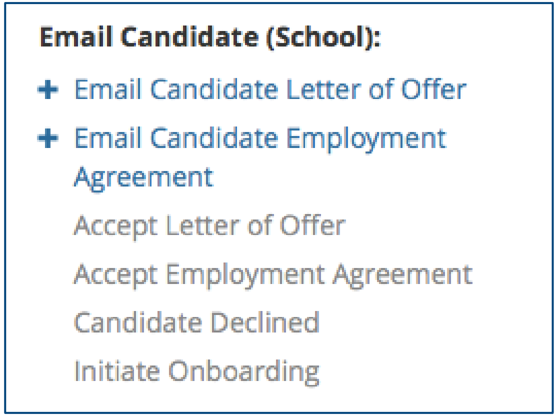
Final Letter of Offer and Employment Agreement

Policy change for signatures:

- As approved by the Office of General Counsel and Provost's Office, the Provost will no longer be signing the Letter of Offer. Each school and college will need to set up their own policy for who will sign the final Letter of Offer. This could be the dean and/or the department chair.

For schools and colleges that do have a SmartPath generated Letter of Offer and Employment Agreement:

- You will receive an email with a link to SmartPath when it's time for you send the Letter of Offer and Employment Agreement to the candidate.
- You will email the Letter of Offer to the candidate and be sure to enter a Requested Return Date. This date defaults to 7 days in the future based on the date the letter is sent.
- You will also email the Employment Agreement to the candidate.
- The "Accept" steps are for the candidate to complete.
- To see what the candidate sees, click on "View As Candidate" in the top menu bar.



Email Candidate (School):

+ Email Candidate Letter of Offer
+ Email Candidate Employment Agreement

Accept Letter of Offer

Accept Employment Agreement

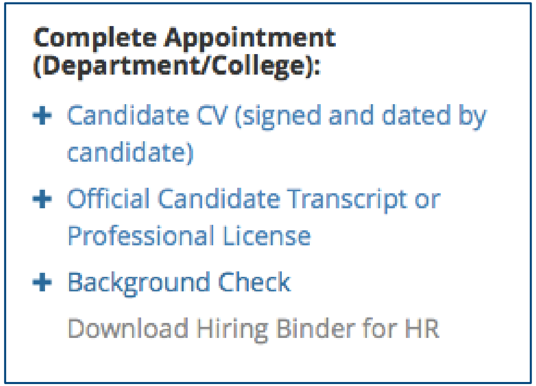
Candidate Declined

Initiate Onboarding

- **Please note:** You will initiate Onboarding only after the candidate has accepted both the Letter of Offer and the Employment Agreement.

Complete Appointment

- The first two steps in this section are PDF file uploads.
- You will not be uploading a background check to the workflow. The Background Check step asks whether the background check has been cleared or denied.
- SmartPath information does not automatically load into Xtender, so the "Download Hiring Binder for HR" link generates a PDF of all the documents for you to upload into Xtender.
- Complete Appointment step
  - This step will only appear once the background check has been cleared.
  - It will be available to complete once all other steps in this section are complete.
  - If the background check has been denied, this step will not be available and you will need to cancel the workflow.



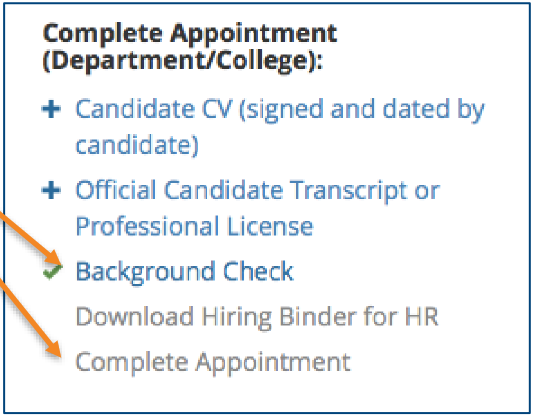
Complete Appointment (Department/College):

+ Candidate CV (signed and dated by candidate)

+ Official Candidate Transcript or Professional License

+ Background Check

Download Hiring Binder for HR



Complete Appointment (Department/College):

+ Candidate CV (signed and dated by candidate)

+ Official Candidate Transcript or Professional License

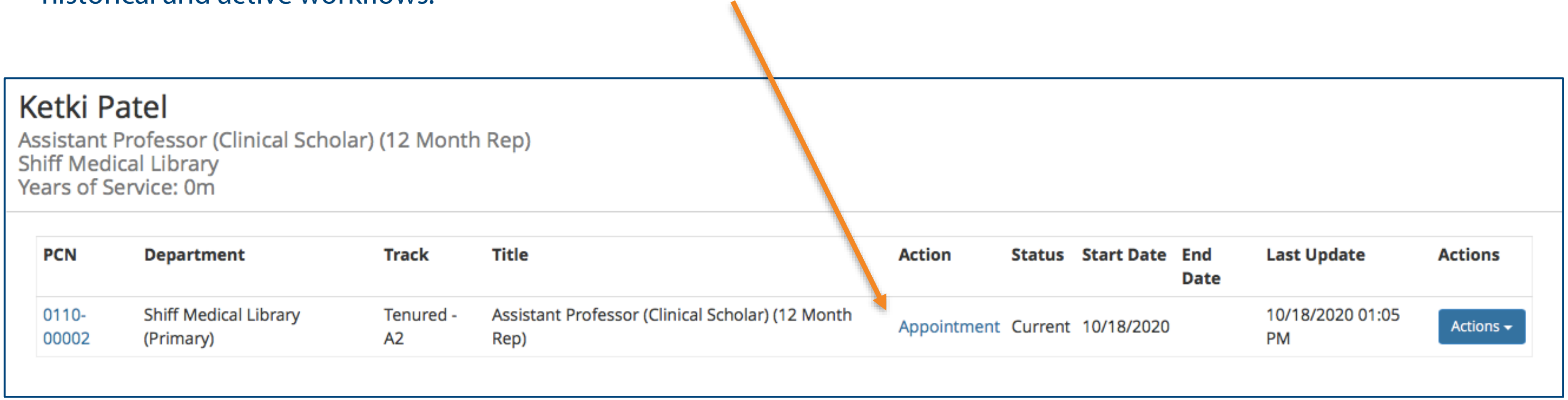
✓ Background Check

Download Hiring Binder for HR

Complete Appointment

Completing the Workflow

- When you have completed the last step in the workflow, the workflow will become historical, meaning that you can still access all of the information, but cannot make any changes.
- This individual will now be listed on the Roster without an active workflow listed.
- You can access all of their historical workflows by clicking on their name on the Roster, which will show you their position history and all historical and active workflows.



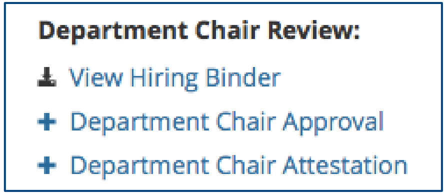
Ketki Patel
Assistant Professor (Clinical Scholar) (12 Month Rep)
Shiff Medical Library
Years of Service: 0m

PCN	Department	Track	Title	Action	Status	Start Date	End Date	Last Update	Actions
0110-00002	Shiff Medical Library (Primary)	Tenured - A2	Assistant Professor (Clinical Scholar) (12 Month Rep)	Appointment	Current	10/18/2020		10/18/2020 01:05 PM	Actions ▾

WSU Appointment Workflow:
For Department Chairs

Overview

- You will receive an email with a link to SmartPath when it’s time for you to review the binder.
- Log into SmartPath with your WSU AccessID and password.
- Department Chair approval is a two step process, please be sure to Approve and Attest.
- The “Department Chair Attestation” is required by OGC and will be included in the hiring binder.

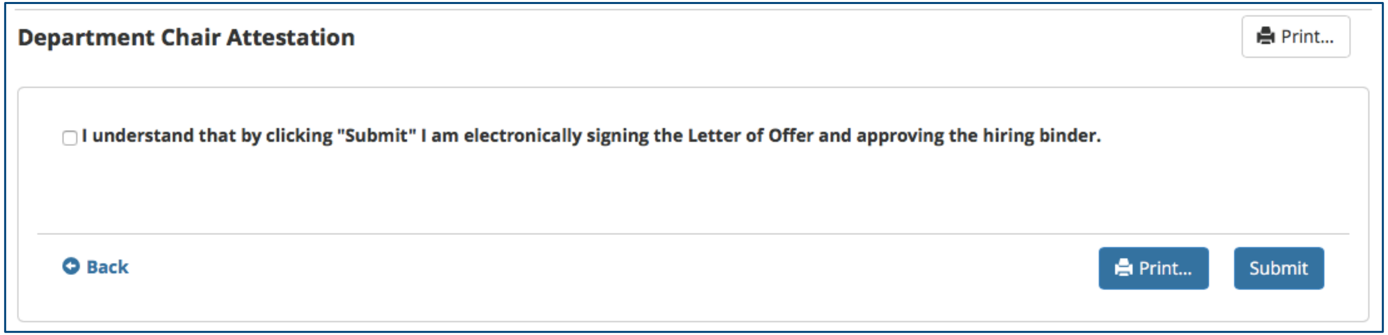


Department Chair Review:

View Hiring Binder

+ Department Chair Approval

+ Department Chair Attestation



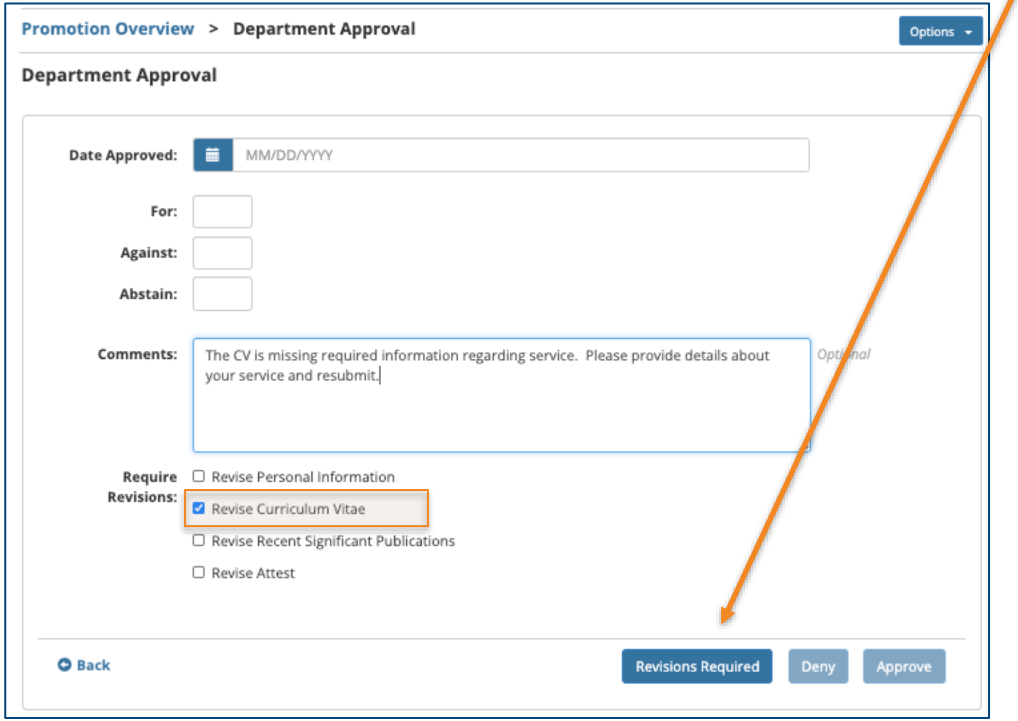
Department Chair Attestation

☐ **I understand that by clicking "Submit" I am electronically signing the Letter of Offer and approving the hiring binder.**

Overview

Workflow: Requesting revisions

*This shows the functionality of requesting revisions, but is not your workflow.



Department Approval

Date Approved: MM/DD/YYYY

For:

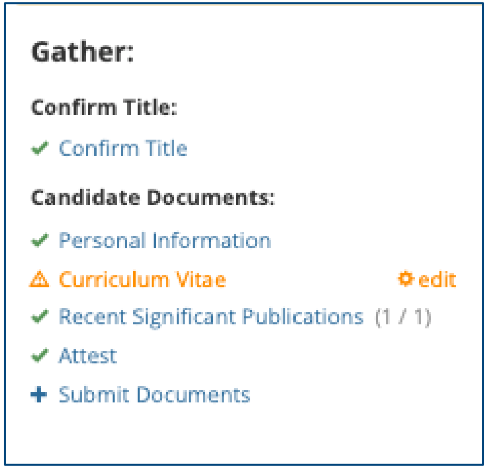
Against:

Abstain:

Comments: The CV is missing required information regarding service. Please provide details about your service and resubmit. *Optional*

Require Revisions:
- ☐ Revise Personal Information
- ☑ Revise Curriculum Vitae
- ☐ Revise Recent Significant Publications
- ☐ Revise Attest

- When a revision is required, the selected step(s) are unlocked for corrections and the appropriate users are emailed.
- The unlocked steps are displayed in orange and any comments are displayed at the top of the screen.



Gather:

Confirm Title:
- ✓ Confirm Title

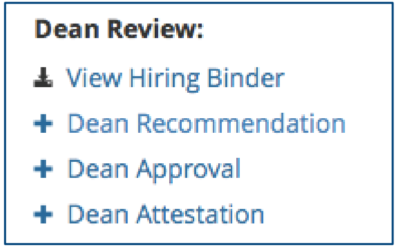
Candidate Documents:
- ✓ Personal Information
- ⚠ Curriculum Vitae ⚙ edit
- ✓ Recent Significant Publications (1 / 1)
- ✓ Attest
- ✚ Submit Documents

- Once corrections are made and resubmitted, the packet will move through the approval process again.

WSU Appointment Workflow:
For Deans

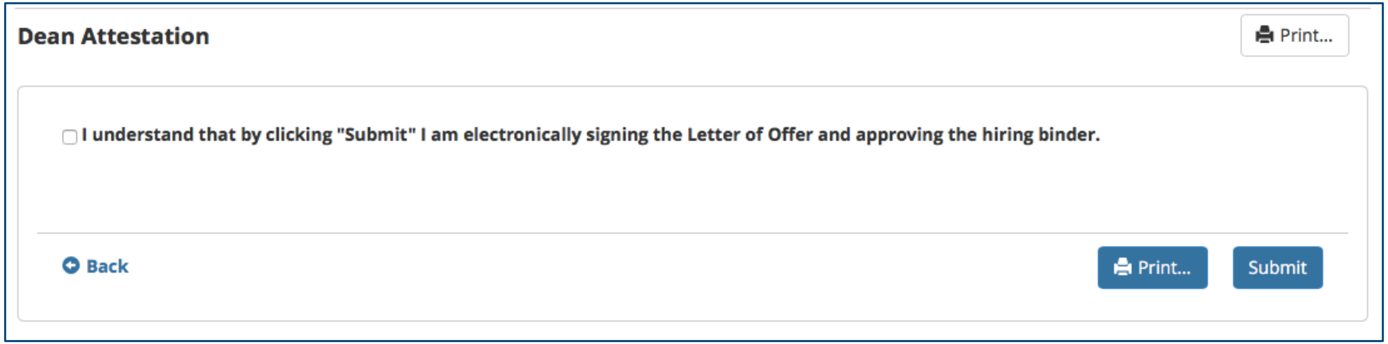
Overview

- You will receive an email with a link to SmartPath when it's time for you to review the binder.
- Log into SmartPath with your WSU AccessID and password.
- The steps that you need to complete may vary depending on your school's process and faculty rank/title.
- The Dean's approval is a two step process, please be sure to Approve and Attest.
- The "Dean Recommendation" will need to be uploaded by either by you or your admin. This must be a PDF.
- The "Dean Attestation" is required by OGC and will be included in the hiring binder.



Dean Review:

View Hiring Binder
+ Dean Recommendation
+ Dean Approval
+ Dean Attestation



Dean Attestation

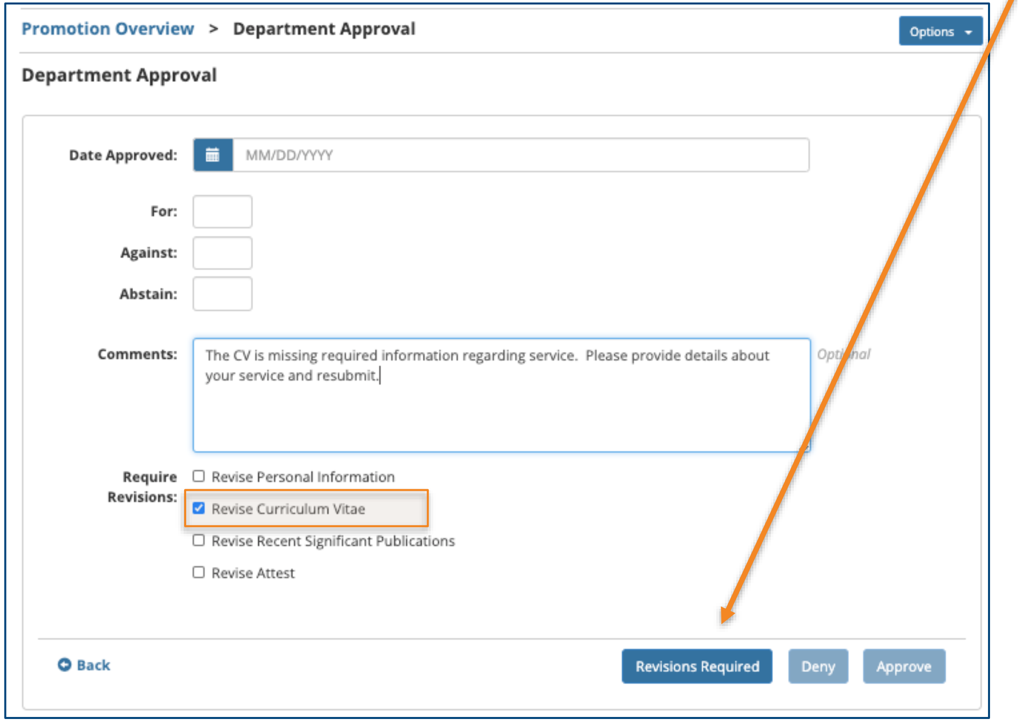
☐ I understand that by clicking "Submit" I am electronically signing the Letter of Offer and approving the hiring binder.

Print...
Back
Print...
Submit

Overview

Workflow: Requesting revisions

*This shows the functionality of requesting revisions, but is not your workflow.



Department Approval

Date Approved: MM/DD/YYYY

For:

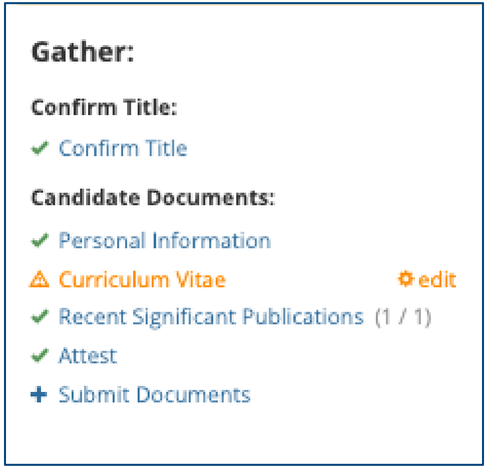
Against:

Abstain:

Comments: The CV is missing required information regarding service. Please provide details about your service and resubmit. *Optional*

Require Revisions:
☐ Revise Personal Information
☑ Revise Curriculum Vitae
☐ Revise Recent Significant Publications
☐ Revise Attest

- When a revision is required, the selected step(s) are unlocked for corrections and the appropriate users are emailed.
- The unlocked steps are displayed in orange and any comments are displayed at the top of the screen.



Gather:

Confirm Title:
✓ Confirm Title

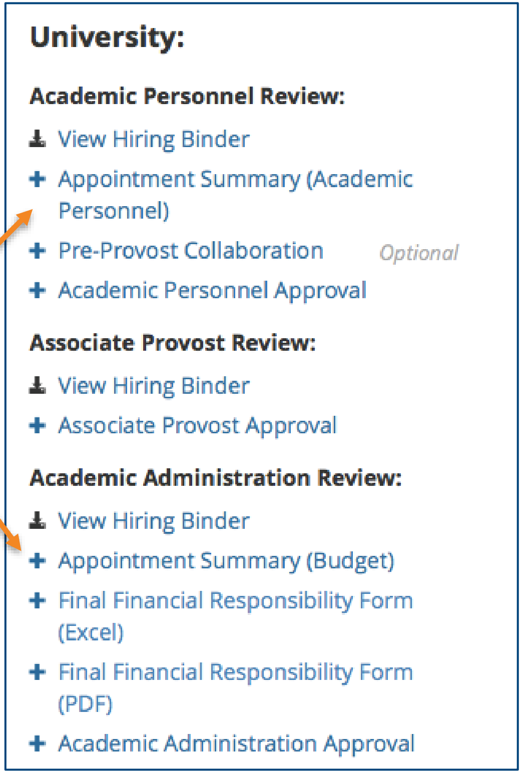
Candidate Documents:
✓ Personal Information
⚠ Curriculum Vitae ⚙ edit
✓ Recent Significant Publications (1 / 1)
✓ Attest
+ Submit Documents

- Once corrections are made and resubmitted, the packet will move through the approval process again.

WSU Appointment Workflow:
For Academic Personnel, Associate Provost, and Academic Administration

Overview

- Once the Dean of the school/college completes their attestation, all of the steps shown on the right will open at the same time.
    - This allows you to view/complete these three sections in any order.
- You will receive an email with a link to SmartPath when it's time for you to review the binder.
- Log into SmartPath with your WSU AccessID and password.
- The steps that you need to complete may vary depending on the faculty rank/title.
- The two Appointment Summary steps only contains the portions of the Appointment Summary that you need to complete. The rest of the Appointment Summary has already been completed by the department and you can view this in the "View Hiring Binder" step.
- Revisions can only be requested from the "Academic Personnel Approval" step.
- Once the "Academic Personnel Approval" step has a green checkmark, this group will receive an email that the binder review has been completed and is ready for the next group to review.
- If there are changes to the FRF, these will be handled via phone conversation with the BAO. Academic Administration will upload final FRF, in both Excel and PDF formats.



University:

Academic Personnel Review:

- View Hiring Binder
- + Appointment Summary (Academic Personnel)
- + Pre-Provost Collaboration *Optional*
- + Academic Personnel Approval

Associate Provost Review:

- View Hiring Binder
- + Associate Provost Approval

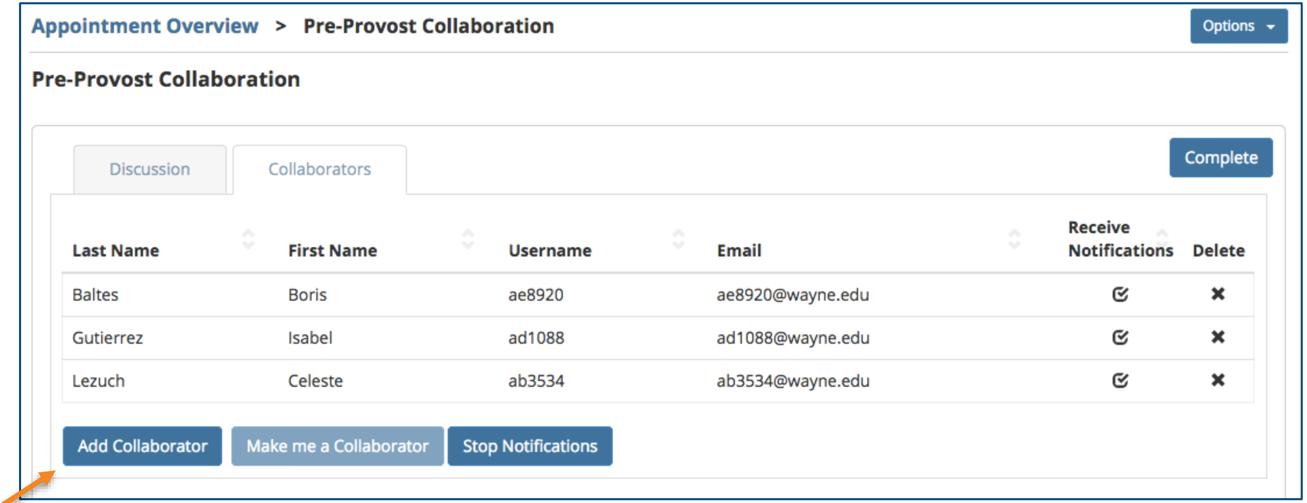
Academic Administration Review:

- View Hiring Binder
- + Appointment Summary (Budget)
- + Final Financial Responsibility Form (Excel)
- + Final Financial Responsibility Form (PDF)
- + Academic Administration Approval

Collaboration

Pre-Provost Collaboration

- This step is optional and intended for questions from Academic Personnel, the Associate Provost, and Academic Administration.
- The Collaborators tab shows you everyone who will receive email notifications when comments are added.
- Boris, Isabel, and Celeste are collaborators by default.
- Additional people can be added by clicking "Add Collaborator."


Appointment Overview > Pre-Provost Collaboration
Options
Discussion
Collaborators
Complete
Add Collaborator
Make me a Collaborator
Stop Notifications

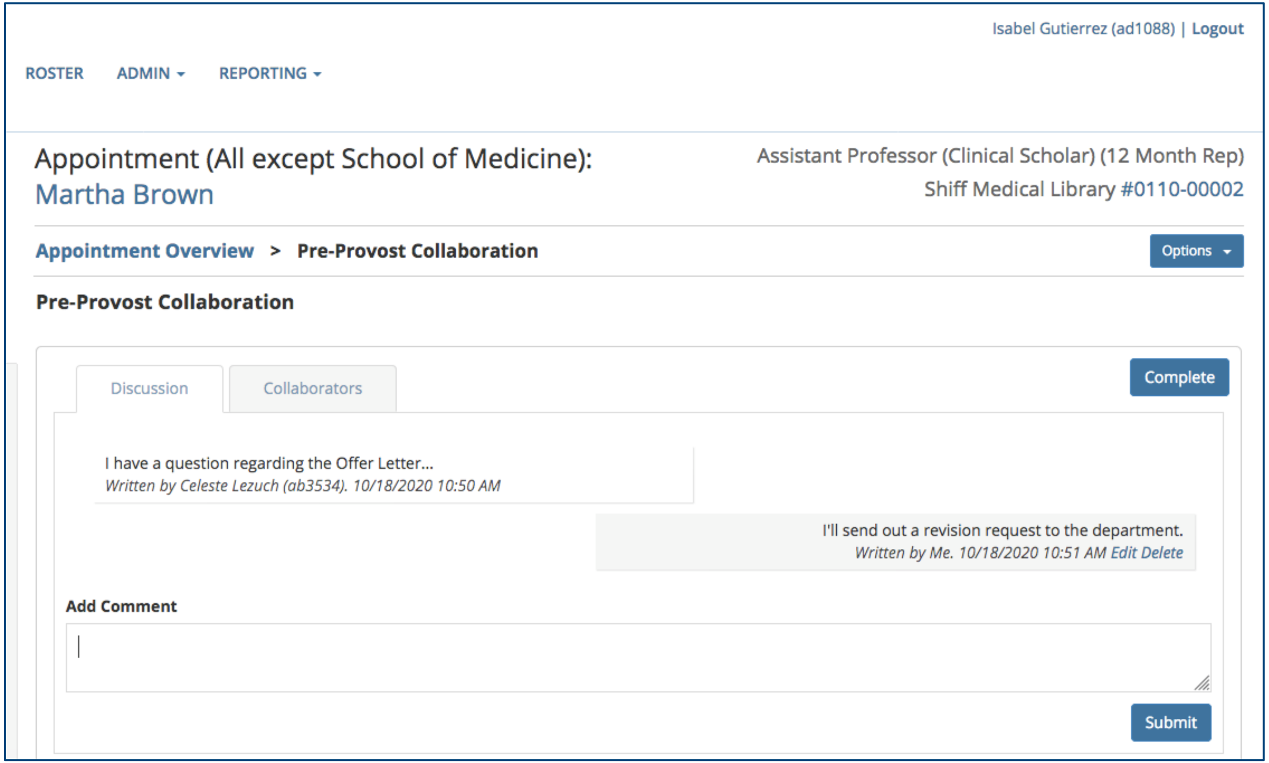
Pre-Provost Collaboration

Last Name	First Name	Username	Email	Receive Notifications	Delete
Baltes	Boris	ae8920	ae8920@wayne.edu	✓	✖
Gutierrez	Isabel	ad1088	ad1088@wayne.edu	✓	✖
Lezuch	Celeste	ab3534	ab3534@wayne.edu	✓	✖

Collaboration

Pre-Provost Collaboration

- The Discussion tab allows all collaborators to add questions and comments.
- The display is similar to what you see when you text someone on a smartphone. Your comments are displayed on the right, and everyone else's comments are displayed on the left.
- You can see who wrote each comment and when they added it.
- You can add new comments at the bottom (and be sure to click 'Submit!')


Isabel Gutierrez (ad1088) | Logout
ROSTER
ADMIN
REPORTING

Appointment (All except School of Medicine): Martha Brown

Assistant Professor (Clinical Scholar) (12 Month Rep)
Shiff Medical Library #0110-00002

Appointment Overview > Pre-Provost Collaboration
Options

Pre-Provost Collaboration

Discussion
Collaborators
Complete

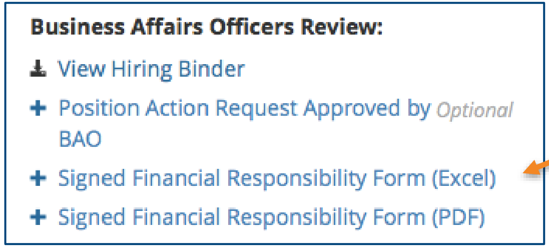
I have a question regarding the Offer Letter...
Written by Celeste Lezuch (ab3534). 10/18/2020 10:50 AM

I'll send out a revision request to the department.
Written by Me. 10/18/2020 10:51 AM Edit Delete

Add Comment
Submit

Financial Responsibility Form (FRF)

Academic Administration



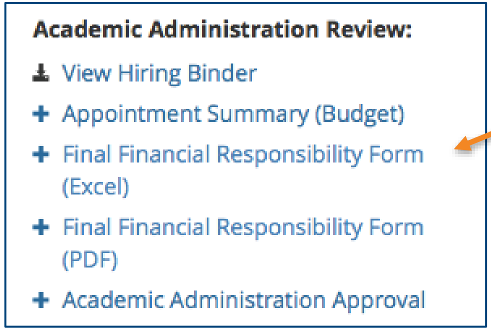
Business Affairs Officers Review:

⭳ View Hiring Binder

+ Position Action Request Approved by BAO *Optional*

+ Signed Financial Responsibility Form (Excel)

+ Signed Financial Responsibility Form (PDF)



Academic Administration Review:

⭳ View Hiring Binder

+ Appointment Summary (Budget)

+ Final Financial Responsibility Form (Excel)

+ Final Financial Responsibility Form (PDF)

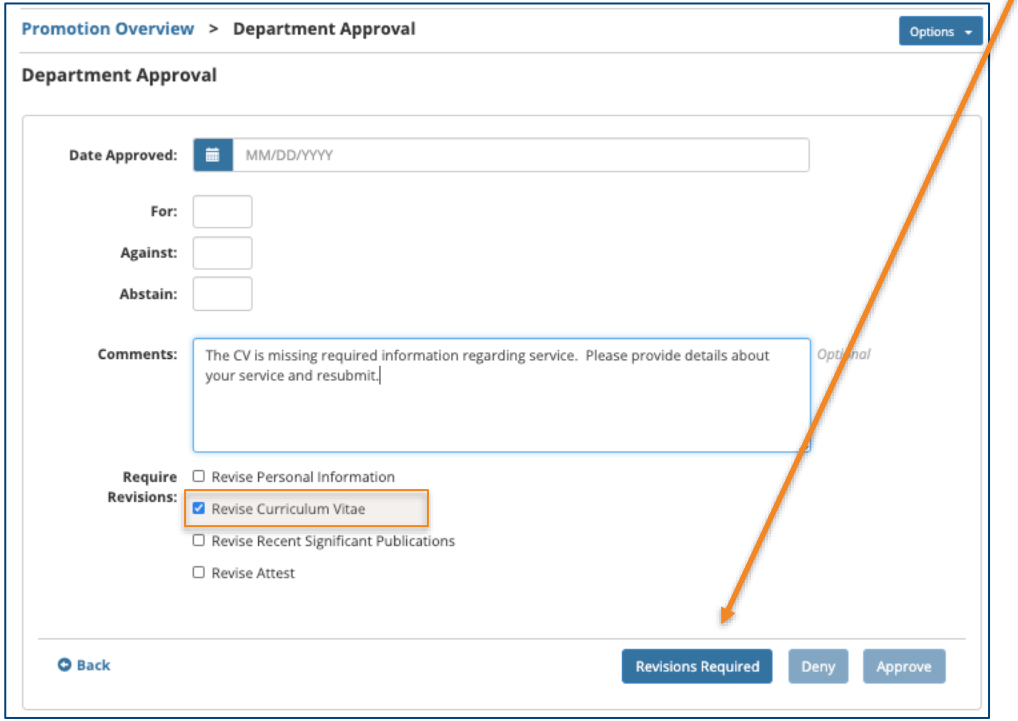
+ Academic Administration Approval

- You can download the BAO’s signed FRF spreadsheet by clicking on the link in the second column of the workflow under “Business Affairs Officers Review.”
- If there are changes to the FRF, these will be handled via phone conversation with the BAO.
- Academic Administration will upload final FRF, in both Excel and PDF formats.
- The final PDF version of the FRF is automatically added to the Provost’s hiring binder.

Overview

Workflow: Requesting revisions

*This shows the functionality of requesting revisions, but is not your workflow.



Promotion Overview > **Department Approval**

Department Approval

Date Approved: MM/DD/YYYY

For:

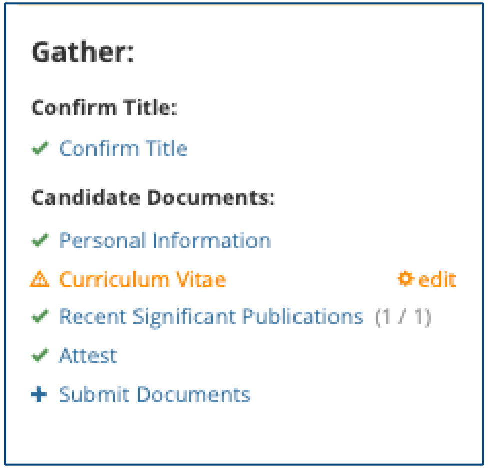
Against:

Abstain:

Comments: The CV is missing required information regarding service. Please provide details about your service and resubmit.

Require Revisions:
☐ Revise Personal Information
☑ Revise Curriculum Vitae
☐ Revise Recent Significant Publications
☐ Revise Attest

- When a revision is required, the selected step(s) are unlocked for corrections and the appropriate users are emailed.
- The unlocked steps are displayed in orange and any comments are displayed at the top of the screen.



Gather:

Confirm Title:
✓ Confirm Title

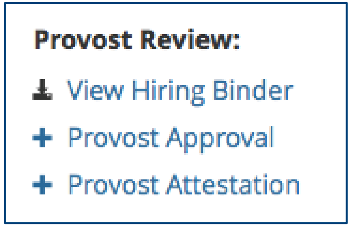
Candidate Documents:
✓ Personal Information
⚠ Curriculum Vitae ⚙edit
✓ Recent Significant Publications (1 / 1)
✓ Attest
+ Submit Documents

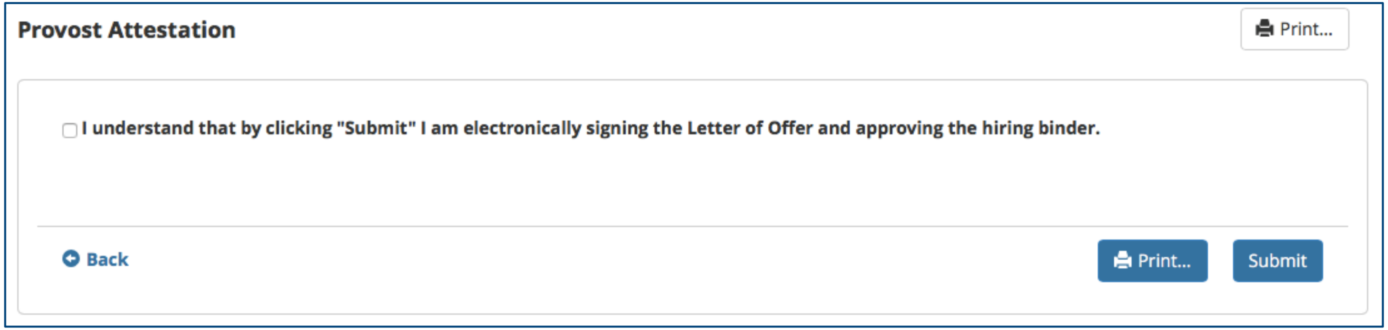
- Once corrections are made and resubmitted, the packet will move through the approval process again.

WSU Appointment Workflow:
For the Provost

Overview

- You will receive an email with a link to SmartPath when it's time for you to review the binder.
- Log into SmartPath with your WSU AccessID and password.
- The Provost's approval is a two step process, please be sure to Approve and Attest.
- The "Provost Attestation" is required by OGC and will be included in the hiring binder.


Provost Review:
View Hiring Binder
+ Provost Approval
+ Provost Attestation

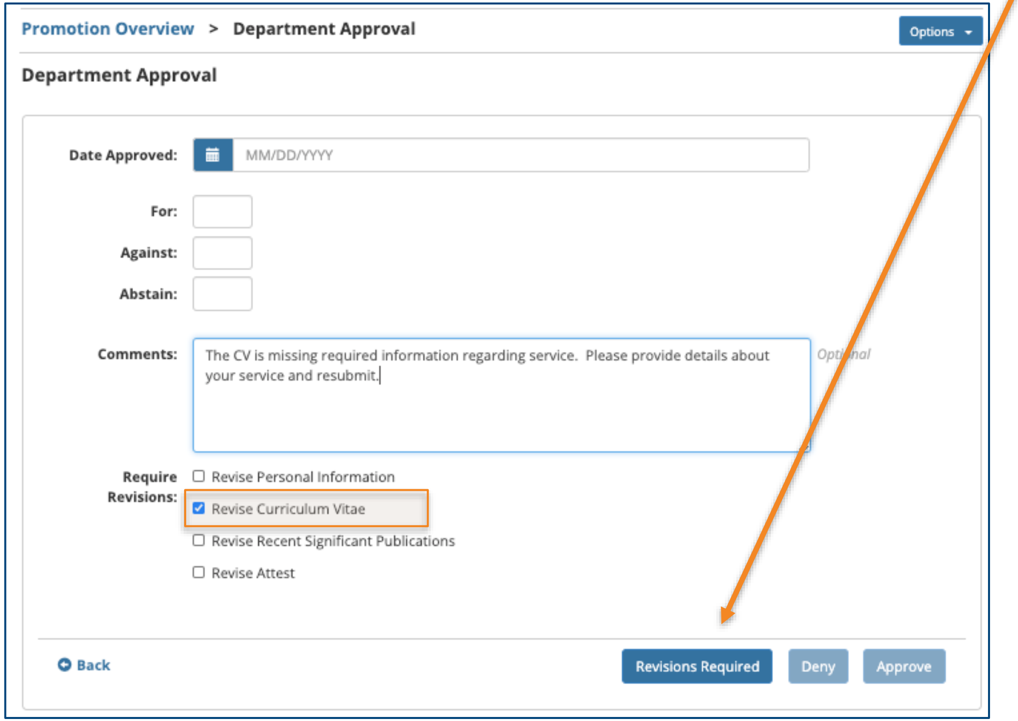

Provost Attestation
Print...
Back
Print...
Submit

☐ **I understand that by clicking "Submit" I am electronically signing the Letter of Offer and approving the hiring binder.**

Overview

Workflow: Requesting revisions

*This shows the functionality of requesting revisions, but is not your workflow.



Promotion Overview > **Department Approval**

Department Approval

Date Approved: MM/DD/YYYY

For:

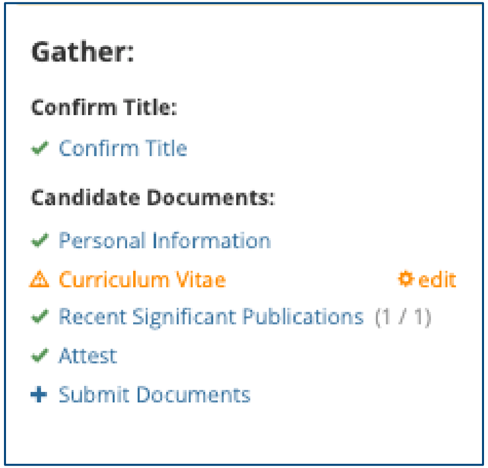
Against:

Abstain:

Comments: The CV is missing required information regarding service. Please provide details about your service and resubmit. *Optional*

Require Revisions:
☐ Revise Personal Information
☑ Revise Curriculum Vitae
☐ Revise Recent Significant Publications
☐ Revise Attest

- When a revision is required, the selected step(s) are unlocked for corrections and the appropriate users are emailed.
- The unlocked steps are displayed in orange and any comments are displayed at the top of the screen.



Gather:

Confirm Title:
✓ Confirm Title

Candidate Documents:
✓ Personal Information
⚠ Curriculum Vitae ⚙ edit
✓ Recent Significant Publications (1 / 1)
✓ Attest
+ Submit Documents

- Once corrections are made and resubmitted, the packet will move through the approval process again.

Need Help?

If you have any questions or need any assistance, please contact your school/college representative.

Need Help? If you have any questions or need any assistance, please contact your school/college representative.

WSU-SmartPath Point of Contacts for Schools/Colleges

LAST UPDATED: 5/5/2022

SCHOOL/COLLEGE	FIRST NAME	LAST NAME	EMAIL	Microsoft Team Link
Mike Ilitch School of Business	Toni	Somers	toni_somers@wayne.edu	Click here to chat.
College of Education	Kierstin	Fiscus	kfiscus@wayne.edu	Click here to chat.
College of Engineering	Rita	Gordon	rita.gordon@wayne.edu	Click here to chat.
College of Fine, Performing, and Communication Arts	Robin	Collins	robin.collins@wayne.edu	Click here to chat.
	James	Thomas	JMThomas@wayne.edu	Click here to chat.
Irvin D. Reid Honors College	Stuart	May	ab1508@wayne.edu	Click here to chat.
Law School	Adeeb	Mozip	aamozip@wayne.edu	Click here to chat.
	Robin	Johnson	rjohnson@wayne.edu	Click here to chat.
College of Liberal Arts and Sciences	Ken	Jackson	KenJackson@wayne.edu	Click here to chat.
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	Josephine	Beaudette	jbeaudette@med.wayne.edu	Click here to chat.
	Renee (Shirley)	Cooper	shcoope@med.wayne.edu	Click here to chat.
College of Nursing	Aiman	Rahman	aimanrahman@wayne.edu	Click here to chat.
Eugene Applebaum College of Pharmacy & Health Sciences	Dawn	Waltz	dwaltz@wayne.edu	Click here to chat.
School of Social Work	Janie	Williams-White	williamswhite@wayne.edu	Click here to chat.
University Libraries and the School of Information Sciences	Rachel	Beatty	ab8711@wayne.edu	Click here to chat.