

# SmartPath™ Overview Wayne State University School of Medicine

Fall 2020





# 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

**STARTING ON MONDAY OCTOBER 26<sup>TH</sup>, YOU WILL BE ABLE TO LOG IN TO SMARTPATH WITH THE LINK BELOW – PLEASE DO NOT LOG IN BEFORE**

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

Website: <https://wsu.mntnpass.com/mps/login>

Username: your WSU AccessID

Password: your associated password



# 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

The screenshot shows the SmartPath Roster interface. At the top, there is a navigation bar with 'DASHBOARD', 'ROSTER', and 'REPORTING' menus. The 'ROSTER' menu is highlighted with an orange box and an arrow pointing to the 'Roster' title. In the top right corner, the user 'John Doe (ofa)' is logged in, with a 'Logout' link and a 'WORKFLOW' dropdown menu. Below the navigation bar, the 'Roster' title is displayed, along with a 'Create New Position...' button. A search bar is present with the text 'Showing 1 to 6 of 6 positions' and a summary: 'Primary: 6 Secondary: 0 Vacant: 0 Supplemental: 0'. An 'Actions' dropdown menu is also visible. The main content is a table with the following columns: PCN, Department, Name, Track, Title / Rank, Position / TIR, Action, and Status. The table contains six rows of data, with the second row highlighted in grey. An arrow points to the 'Action' column of the second row, specifically to the 'Faculty Evaluation' link. On the left side, an arrow points to the 'Department' dropdown menu. On the right side, an arrow points to the 'Create New Position...' button, and another arrow points to the 'Faculty Evaluation' link.

Access the roster from the navigation menu

Create a new position or appointment

Sort, search and filter to find the right person

Link directly to an "In Progress" workflow

PCN	Department	Name	Track	Title / Rank	Position / TIR	Action	Status
04-0001	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
15-0001	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 Professor	In Progress	Faculty Evaluation	Started





# Navigation

The screenshot shows the SmartPath dashboard interface. At the top left, the SmartPath logo is displayed. To its right are navigation tabs: DASHBOARD, ROSTER, and REPORTING. A dropdown menu for REPORTING is visible. In the top right corner, the user's name 'John Doe (ofa)' and a 'Logout' link are shown. A 'WORKFLOW' dropdown menu is open, showing options for 'Workflow' and 'Curriculum Vitae'. Below the navigation is a search bar and a section titled '4 actionable items'. This section contains several filters: Workflows (Annual Review), Events (Annual Review Read...), Tracks (Clinical, Research), Titles (Clinical Professor, ...), and Departments (Family and Community Me...). Below the filters is a table with columns: Last Updated, Name, Department, Title / Rank, and PCN. The table lists several records, including one for Shelley Diaz in Medical Education and another for Melba Brooks in Family and Community Medicine. An orange box highlights the navigation area, and an orange arrow points from the 'REPORTING' tab to the 'Annual Review Started' section of the table. Another orange arrow points from the 'WORKFLOW' dropdown to the right side of the page.

SmartPath

DASHBOARD ROSTER REPORTING ▾

John Doe (ofa) | Logout

WORKFLOW ▾

Workflow

Curriculum Vitae

## Dashboard

Search:  4 actionable items

**Workflows** **Events** **Tracks** **Titles** **Departments** [Select All](#)

Annual Review ▾ Annual Review Read... ▾ Clinical, Research ▾ Clinical Professor, ... ▾ 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

John Doe (ofa) | Logout

SmartPath DASHBOARD ROSTER REPORTING

**WORKFLOW**

- Workflow
- Curriculum Vitae

## Dashboard

Search:  4 actionable items

**Workflows** **Events** **Tracks** **Titles** **Departments** [Select All](#)

Annual Review Annual Review Read... Clinical, Research Clinical Professor, ... 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

The screenshot shows the SmartPath Roster page. At the top, there is a navigation bar with 'DASHBOARD', 'ROSTER', 'REPORTING', and 'WORKFLOW'. The user is logged in as 'John Doe (ofa)'. The main heading is 'Roster' with a 'Create New Position...' button. Below the heading, there is a search bar and a summary: 'Showing 1 to 4 of 4 positions (filtered from 6 total positions)'. The summary also indicates 'Primary: 4 Secondary: 0 Vacant: 0 Supplemental: 0'. There is an 'Actions' button. The main table has columns: PCN, Department, Name, Track, Title / Rank, Position / TIR, Action, and Status. The first row is highlighted: PCN 03-00001, Department Emergency Medicine, Name Holland, Rosa, Track Clinical, Title / Rank Clinical Associate Professor, Position / TIR 3y 2m, Action --, Status --. An orange arrow points from the 'Name' column to a detailed view of this position. The detailed view shows a table with columns: PCN, Department, Track, Title, Action, Status, Start Date, End Date, Last Update, and Actions. The row for PCN 03-00001 is shown with details: Department (Primary) Emergency Medicine, Track Clinical, Title Clinical Associate Professor, Status Current, Start Date 08/01/2017, End Date 07/31/2021, Last Update 09/27/2020 07:29 PM. An 'Actions' button is present, with a dropdown menu showing 'Faculty Evaluation...' and 'Termination...'. Another orange arrow points from the 'Actions' dropdown to the text 'Select workflow to initiate'.

John Doe (ofa) | Logout

DASHBOARD ROSTER REPORTING WORKFLOW

### Roster

Create New Position...

Select All | Search All: 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
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 and Gynecology						
04-00002	Family and Community Medicine						

Show 50 rows

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

Faculty Evaluation...  
Termination...

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

Select workflow to initiate



# Workflow

## Creating New Workflows

The screenshot shows the SmartPath Roster page. At the top, there is a navigation bar with 'DASHBOARD', 'ROSTER', 'ADMIN', and 'REPORTING' menus, and a 'WORKFLOW' dropdown. The user is identified as 'MPS Administrator (mpsadmin) | Logout'. The main heading is 'Roster', with a 'Create New Position...' button. Below this, there is a search bar and summary statistics: 'Showing 1 to 50 of 161 positions', 'Primary: 161', 'Secondary: 0', 'Vacant: 20', and 'Supplemental: 3'. An 'Actions' dropdown is also present. A table lists roster items with columns for PCN, Department, Name, Track, and Title / Rank. A modal window titled 'New Position' is open, prompting the user to 'Provide details below to create a Position:'. The modal includes a 'Department & Title' section with a list of radio buttons for departments, a 'Track' dropdown menu, and a 'Title' dropdown menu. A 'Create Position' button is at the bottom of the modal.

MPS Administrator (mpsadmin) | Logout

DASHBOARD ROSTER ADMIN REPORTING WORKFLOW

Roster

Create New Position...

Select All | Search All: Showing 1 to 50 of 161 positions  
Primary: 161 Secondary: 0 Vacant: 20 Supplemental: 3 Actions

PCN	Department	Name	Track	Title / Rank
08-00039	Family Medicine	Adams, Derick	Clinical	Clinical Assistant Professor
	Family Medicine	Adams, Derick	Clinical	Clinical Assistant 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 Position

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:	Review:	Finalize:
<b>Faculty Forms:</b> <ul style="list-style-type: none"><li>+ Last Year's Effort Assignment</li><li>+ Last Year's Goals &amp; Accomplishments</li><li>+ Process Improvement Project</li><li>+ Curriculum Vitae</li><li>+ Teaching Portfolio</li><li>+ Scholarly Accomplishments</li><li>▾ View Annual Review Submit to Chair and/or Chief</li></ul>	<b>Chair and/or Chief Review:</b> <ul style="list-style-type: none"><li>View Annual Review</li><li>Chair and/or Chief Approval</li><li>Chair Review and Comments</li><li>Next Year's Department Goals</li></ul> <b>Candidate Review:</b> <ul style="list-style-type: none"><li>View Annual Review</li><li>Candidate Acknowledgement</li></ul>	<b>Complete Annual Review:</b> <ul style="list-style-type: none"><li>Complete Annual Review</li></ul>

- 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.

- 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.

Promotion (short): Sandra I Bennett (bens)  
Clinical Professor  
Dermatology #06-00008  
Set Proposed Start Date

Promotion Overview

Gather:	Review:	Decide:
<b>Confirm Title:</b> <ul style="list-style-type: none"><li>✓ Confirm Title</li></ul> <b>Candidate Documents:</b> <ul style="list-style-type: none"><li>✓ Personal Information</li><li>✓ Curriculum Vitae</li><li>✓ Recent Significant Publications (1 / 1)</li><li>✓ Attest</li><li>✓ Submit Documents</li></ul>	<b>Manage Evaluations:</b> <ul style="list-style-type: none"><li>+ Manage Evaluations (0/3)</li></ul> <b>Department Review:</b> <ul style="list-style-type: none"><li>▾ View Promotion Packet</li><li>+ Department Approval</li></ul>	<b>Committee Review:</b> <ul style="list-style-type: none"><li>▾ View Promotion Packet</li><li>+ Committee Review</li><li>+ Committee Approval</li></ul> <b>Complete Promotion:</b> <ul style="list-style-type: none"><li>+ Complete Promotion</li></ul>



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

Options ▾

### Last Year's Effort Assignment

Print...

Teaching effort (%):

Research 1 (Grant Funded) effort (%):

Research 2 (Department Sponsored)  
effort (%):

Departmental Administration effort (%):

Clinical effort (%):

⬅ Back

Print...

Save as Draft

Save

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: Clinical Associate Professor  
Rosa Holland (qqq) Emergency Medicine #03-0001

**Faculty Evaluation Overview > Curriculum Vitae** Options ▾

⚙ **Curriculum Vitae:**

Browse...

Use CV In System

⬅ Back

- 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

Promotion Overview > Department Approval Options ▾

### Department Approval

Date Approved:

For:

Against:

Abstain:

Comments:  Optional

Require Revisions:

- Revise Personal Information
- Revise Curriculum Vitae
- Revise Recent Significant Publications
- Revise Attest

[Back](#) [Revisions Required](#) [Deny](#) [Approve](#)

- 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

## Managing Evaluations

Track progress by evaluator type

Create and manage a list of evaluators and track status

**Manage Evaluations**

13 Total Evaluations Required | 13 Received  
5 External Arm's Length Required | 5 Completed  
2 Internal Required | 2 Completed  
4 Undergraduate Student Required | 4 Completed  
2 Graduate Student Required | 2 Completed

Suggested by Candidate: 9  
Suggested by Chair/Chief: 4

Status	Evaluator	Email	Type	Suggested	Action
✓ Approved	Mariah Simpkins	msimpkins@gvsu.edu	External Arm's Length	Chair/Chief	Action ▾
✓ Approved	Kaitlyn Beckett	kbeckett@cmu.edu	External Arm's Length	Candidate	Action ▾
✓ Approved	Ulysses Winchester	uwinchester@cornell.edu	External Arm's Length	Candidate	Action ▾
✓ Approved	David Loki	dloki@osu.edu	External Arm's Length	Candidate	Action ▾
✓ Approved	Cynthia Stevens	cstevens@harvard.edu	External Arm's Length	Candidate	Action ▾
✓ Uploaded on 09/27/2020 07:05 PM	Holly VanderKooi	hvanderk@myuniv.edu	Internal	Chair/Chief	Action ▾
✓ Uploaded on 09/27/2020 07:05 PM	Ingrid Biggs	ibiggs@myuniv.edu	Internal	Candidate	Action ▾
✓ Uploaded on 09/27/2020 07:05 PM	Renee Andrews	randrews@umich.edu	Undergraduate Student	Candidate	Action ▾
✓ Uploaded on 09/27/2020 07:06 PM	Angela Brown	angelabrown@umich.edu	Undergraduate Student	Candidate	Action ▾

Decline

✉ Send Email

✉ Resend Email

👁 View Evaluation

📄 Upload Evaluation

🔄 Review Evaluation

✎ Edit Evaluator

🗑 Delete

- Send templated email to reviewers
- Email contains link to the candidate's packet and place to upload evaluation
- Confirm/Approve that reviewer meets criteria



# 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.

The screenshot displays the SmartPath system interface. At the top right, the user is identified as 'MPS Administrator (mpsadmin) | Logout'. The navigation menu includes 'DASHBOARD', 'ROSTER', 'ADMIN', 'REPORTING', and 'VIEW AS CANDIDATE', which is highlighted with an orange box. Below the navigation, the main content area shows an appointment for 'Wayne Lai (ccc)' with a status of 'Review Complete' and a progress indicator of '57% (19 of 33)'. The appointment is for the position of 'Adjunct Professor, Biologic and Materials Sciences & Prosthodontics - Prosthodontics #05-00021'. A 'Set Proposed Start Date' button is visible. Below this, a 'Wayne Lai (ccc) | Logout' link is present. The 'EXIT VIEW AS CANDIDATE' section shows a list of 'Appointment Items (100%)' with green checkmarks indicating completion: Personal Information, Education, Certification, Academic Appointments, Curriculum Vitae, Letters of Recommendation (3 / 3), Submit to Faculty Affairs, and Accept Appointment Letter. The 'Candidate Appointment Information > Personal Information' section is expanded, showing 'Demographic Information' with fields for Date of Birth (09/27/1980), Country of Birth (United States of America), Birth State (Michigan (MI)), and Citizenship (United States of America). A question 'Are you currently living in the United States?' is also present with 'Yes' and 'No' radio buttons.



# 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 ▾

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 (Academic Personnel)
- ✓ Academic Personnel Appr

iewers (0/2)

Review:

### 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 ▾

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

**University:**

**Academic Personnel Review**

- View Hiring Binder
- ✓ Appointment Summary (Academic Personnel)
- ✓ Academic Personnel Appr

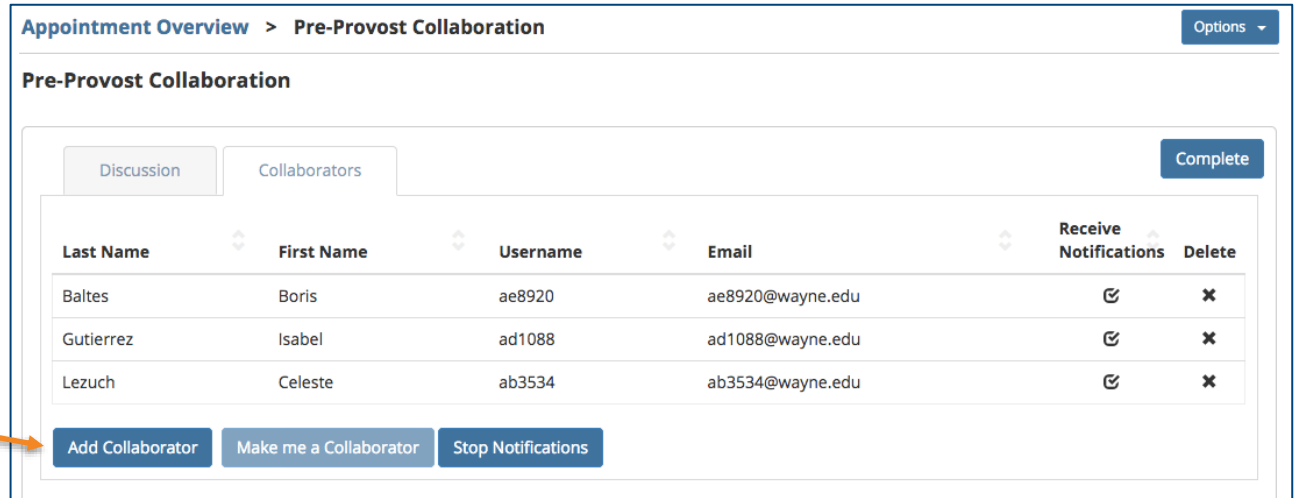
Reviewers (0/2)

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



- 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.”



The screenshot displays the 'Appointment Overview > Pre-Provost Collaboration' interface. It features a 'Pre-Provost Collaboration' section with two tabs: 'Discussion' and 'Collaborators'. A 'Complete' button is located in the top right corner of this section. Below the tabs is a table listing collaborators with columns for Last Name, First Name, Username, Email, Receive Notifications, and Delete. An orange arrow points to the 'Add Collaborator' button at the bottom left of the interface.

Last Name	First Name	Username	Email	Receive Notifications	Delete
Baltes	Boris	ae8920	ae8920@wayne.edu	<input checked="" type="checkbox"/>	✕
Gutierrez	Isabel	ad1088	ad1088@wayne.edu	<input checked="" type="checkbox"/>	✕
Lezuch	Celeste	ab3534	ab3534@wayne.edu	<input checked="" type="checkbox"/>	✕

Buttons at the bottom: Add Collaborator, Make me a Collaborator, Stop Notifications



# 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!').

The screenshot shows a web application interface for 'Appointment Collaboration'. At the top right, it displays the user 'Isabel Gutierrez (ad1088) | Logout'. Below this is a navigation bar with 'ROSTER', 'ADMIN', and 'REPORTING' options. The main content area is titled 'Appointment (All except School of Medicine): Martha Brown' and includes the role 'Assistant Professor (Clinical Scholar) (12 Month Rep)' and 'Shiff Medical Library #0110-0002'. A breadcrumb trail shows 'Appointment Overview > Pre-Provost Collaboration' with an 'Options' dropdown menu. The 'Pre-Provost Collaboration' section has two tabs: 'Discussion' (selected) and 'Collaborators'. A 'Complete' button is in the top right of this section. The discussion area shows two comments: one from Celeste Lezuch (10/18/2020 10:50 AM) asking a question, and one from 'Me' (10/18/2020 10:51 AM) responding that a revision request will be sent. At the bottom, there is an 'Add Comment' text area and a 'Submit' button.





# 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 cancellation reason. Once you click “Cancel Job Action,” the workflow will be historical. You cannot undo this action.

The screenshot displays a workflow management interface. At the top right, it shows the user 'MPS Administrator (mpsadmin) | Logout' and a 'WORKFLOW' dropdown menu. The main content area displays details for an 'Associate Professor (Clinical Scholar) (12 Month Rep)' in 'Internal Medicine - Geriatrics #0609E-00001'. A blue 'Options' button is visible on the right. A dropdown menu is open from this button, listing several actions: 'Contact Information', 'Position History', 'Faculty Detail', 'Cancel Appointment' (highlighted with an orange box), 'Resend Email', and 'Activity Log (50)'. An orange arrow points from the 'Options' button to the 'Cancel Appointment' option. Below the main content, a 'Cancel Job Action' dialog box is shown. It contains the text '0609E-00001: Appointment Associate Professor (Clinical Scholar) (12 Month Rep) Geriatrics' and a 'Reason for Cancellation:' label above a text input field. At the bottom of the dialog, there are two buttons: 'Back' and 'Cancel Job Action'. An orange arrow points from the 'Cancel Appointment' option in the dropdown menu to the 'Cancel Job Action' button in the dialog box.



# Maintaining the SmartPath Roster



# Workflows to Maintain the Roster

- Name Change = change someone's name
- 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 ▾

[← Back](#)

- Name Change...
- Position Change...
- Reappointment...
- Termination...
- Title Change...






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



# Launching an Appointment workflow

- SmartPath Appointment starts after a final candidate has been identified.
- 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)  
 Appointment (School of Medicine only)

**Track:**

**Title:**

---



# 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 new 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:**

**Action:**

**Appointment Start Date:**

**WSU Employment History:**  None  Prior  Current

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

**Gender:**  Male  Female



# SoM: Executive Committee Review

## Overview

### Executive Committee Review:

📄 View Hiring Binder

+ Preliminary OFA Approval

Assign Primary & Secondary Reviewers (0/2)

Meeting Date

Ready for Executive Committee Meeting

Executive Committee Collaboration

Executive Committee Approval

### Preliminary OFA Approval

- You can send back for revisions.

### Assign Primary & Secondary Reviewers

- You can assign one primary and one secondary reviewer and send them an email.
- The reviewers can choose to upload notes if desired, but this is not required
  - If they do upload notes, all Executive Committee members will receive an email notifying them that a document has been added to the binder.

### Meeting Date

- You can set a meeting date (or reset a meeting date if the binder is tabled).

### Ready for Executive Committee Meeting

- Completing this step will email and create a dashboard event for Executive Committee members.

### Executive Committee Collaboration

- This is optional.

### Executive Committee Approval

- You can record the final Approval Date, final vote tally, and comments.



# SoM: OFA Review and BAO Review

## Overview

### OFA Review:

- 📁 View Hiring Binder
- + Change Rank *Optional*
- + Dean Recommendation *Optional*
- + OFA Approval

### BAO Review:

- 📁 View Hiring Binder
- + Position Action Request Approved by BAO
- + Signed Financial Responsibility Form *Optional* (Excel)
- + Signed Financial Responsibility Form *Optional* (PDF)
- + Dean Summary Comments
- + Review Dean Summary
- + BAO/OFA Collaboration *Optional*
- BAO Approval

### BAO/OFA Collaboration

- This is optional and located under “BAO Review.”
- OFA and BAO can use this to ask questions during the review process.

### OFA Review

#### Change Rank

- You can change the rank/title if needed.

#### Dean Recommendation

- This must be a PDF.

#### OFA Approval

- This must be completed before the BAO Approval can be completed.

### BAO Review

#### Dean Summary Comments

- The questions answered here will be added to the “Review Dean Summary” step.

#### Review Dean Summary

- You must check the checkbox at the bottom of the page and click Submit.
- The summary page will be added to the Dean’s binder.

#### BAO Approval

- Executive Committee Approval, OFA Approval, and all required BAO Review steps must be completed before this step is available for completion.



# 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 *Optional* BAO
- + 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

[Add Evaluator...](#) [Override Requirements...](#)

[Back](#)

- Decline
- Send Email
- Resend Email
- View Evaluation
- Upload Evaluation
- Review Evaluation
- Edit Evaluator
- Delete



# 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)	<a href="#">Appointment</a>	Current	10/18/2020		10/18/2020 01:05 PM	<a href="#">Actions</a> ▾





# 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.
- 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

[Print...](#)

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

---

[Back](#) [Print...](#) [Submit](#)



# Overview

## Workflow: Requesting revisions

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

Promotion Overview > Department Approval

Options

### Department Approval

Date Approved:

For:

Against:

Abstain:

Comments:  Optional

Require Revisions:

- Revise Personal Information
- Revise Curriculum Vitae
- Revise Recent Significant Publications
- Revise Attest

Back Revisions Required Deny Approve

- 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 SoM Executive Committee



# 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.
- Discussion
  - 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!').
- Collaborators
  - Lists everyone who will receive email notifications when comments are added.
  - All EC members are initial collaborators.
  - Additional people can be added by clicking "Add Collaborator."

## Appointment Overview

### School/College:

### Executive Committee Review:

 [View Hiring Binder](#)









 [Executive Committee Collaboration](#)

*Optional*

**Appointment Overview** > **Executive Committee Collaboration** Options ▾

### Executive Committee Collaboration

Discussion Voting Collaborators Complete

Last Name	First Name	Username	Email	Receive Notifications	Delete
Rowley	James	aa1499	aa1499@wayne.edu		
Fridman	Rafael	aa2721	aa2721@wayne.edu		
Ackerman	Sharon	aa2155	aa2155@wayne.edu		
Pearson	Claire	dx2738	dx2738@wayne.edu		







# WSU Appointment Workflow: For SoM Dean





# 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 "Dean Attestation" is required by OGC and will be included in the hiring binder.

## Dean Review:

- 📄 View Hiring Binder
- + Dean Collaboration with BAO and OFA *Optional*
- + Dean Approval
- Dean Attestation

## Dean Attestation

Print...

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

Back

Print...

Submit



# Overview

## Dean Collaboration with BAO and OFA

- Discussion
  - 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!').
- Collaborators
  - Lists everyone who will receive email notifications when comments are added.
  - The Dean, Dean's Chief of Staff, OFA, and BAO members are initial collaborators.
  - Additional people can be added by clicking "Add Collaborator."

**Dean Review:**

- ↓ View Hiring Binder
- + Dean Collaboration with BAO and OFA *Optional*
- + Dean Approval
- Dean Attestation

**Appointment Overview** > **Dean Collaboration with BAO and OFA** Options ▾

**Dean Collaboration with BAO and OFA**

Discussion Collaborators Complete

Last Name	First Name	Username	Email	Receive Notifications	Delete
Timchuck	Janice	ak5295	ak5295@wayne.edu	📧	✕
Schweitzer	Mark	he4401	he4401@wayne.edu	📧	✕
Robell	Sue	ab9334	ab9334@wayne.edu	📧	✕
Weathers	Natasha	ak5901	ak5901@wayne.edu	📧	✕
Beaudette	Josie	ad2163	ad2163@wayne.edu	📧	✕



# Overview

## Workflow: Requesting revisions

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

Promotion Overview > Department Approval

Options

### Department Approval

Date Approved:

For:

Against:

Abstain:

Comments:  Optional

Require Revisions:

- Revise Personal Information
- Revise Curriculum Vitae
- Revise Recent Significant Publications
- Revise Attest

Back Revisions Required Deny Approve

- 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:

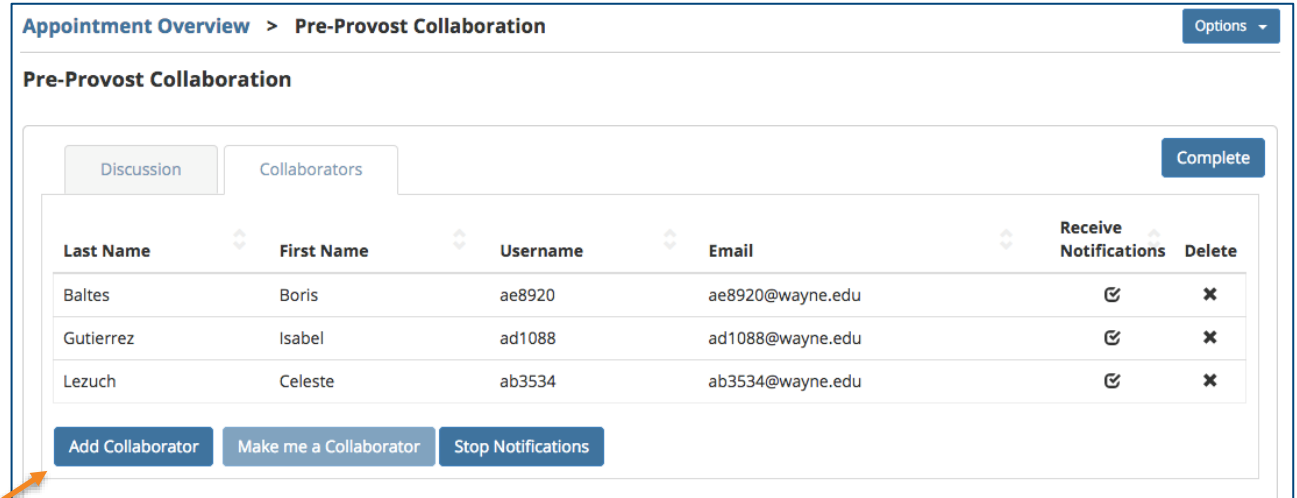
- ↓ View Hiring Binder
- + Appointment Summary (Budget)
- + Final Financial Responsibility Form (Excel)
- + Final Financial Responsibility Form (PDF)
- + Academic Administration Approval



# 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."



The screenshot displays the 'Pre-Provost Collaboration' interface. At the top, there is a breadcrumb trail 'Appointment Overview > Pre-Provost Collaboration' and an 'Options' dropdown menu. Below this, the title 'Pre-Provost Collaboration' is shown. There are two tabs: 'Discussion' and 'Collaborators', with 'Collaborators' being the active tab. A 'Complete' button is located in the top right corner of the main content area. The main content area contains a table with the following columns: Last Name, First Name, Username, Email, Receive Notifications, and Delete. The table lists three collaborators: Baltes (Boris, ae8920, ae8920@wayne.edu), Gutierrez (Isabel, ad1088, ad1088@wayne.edu), and Lezuch (Celeste, ab3534, ab3534@wayne.edu). Below the table, there are three buttons: 'Add Collaborator', 'Make me a Collaborator', and 'Stop Notifications'. An orange arrow points to the 'Add Collaborator' button.

Last Name	First Name	Username	Email	Receive Notifications	Delete
Baltes	Boris	ae8920	ae8920@wayne.edu	<input checked="" type="checkbox"/>	✕
Gutierrez	Isabel	ad1088	ad1088@wayne.edu	<input checked="" type="checkbox"/>	✕
Lezuch	Celeste	ab3534	ab3534@wayne.edu	<input checked="" type="checkbox"/>	✕



# 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!')

The screenshot displays a web interface for a Pre-Provost Collaboration. At the top right, the user is identified as Isabel Gutierrez (ad1088) with a Logout link. Navigation tabs include ROSTER, ADMIN, and REPORTING. The main content area shows an appointment for Martha Brown, an Assistant Professor (Clinical Scholar) with a 12-month term at Shiff Medical Library #0110-0002. A breadcrumb trail indicates the current view is Pre-Provost Collaboration. A 'Complete' button is visible in the top right of the collaboration area. The interface features two tabs: 'Discussion' (selected) and 'Collaborators'. The discussion thread contains two messages: one from Celeste Lezuch asking a question about an offer letter, and a response from the user stating they will send a revision request. Below the messages is an 'Add Comment' section with a text input field and a 'Submit' button.

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 #0110-0002

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 *Optional* BAO
- + 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

Options

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

Back Revisions Required Deny Approve

- 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 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...

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

Back

Print...

Submit



# Overview

## Workflow: Requesting revisions

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

Promotion Overview > Department Approval

Options

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

Back Revisions Required Deny Approve

- 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.



# SmartPath CV



MPS Administrator (mpsadmin) | Logout

SmartPath CV HOME PRINT MANAGE EXTERNAL DATA ADMIN

**CURRICULUM VITAE**

- MPS Administration
- Curriculum Vitae
- Workflow
- Faculty Profile

### MPS Administrator

Welcome

#### Work with a CV:

Select a CV:

Administrator, MPS	1, User
3, User	4, User
5, User	Doe, John
Jenson, Hal	User, Department

#### Manage Access to your CV:

##### Add a New Proxy Holder

User:

Read / Edit:

These are the CVs you have access to

Access the CV module via the dropdown

Faculty members can designate a proxy to enter/edit data on their behalf



- The left-hand navigation displays all the main categories of your institution's CV.
- To add another entry, click on either of the two highlighted areas to bring up a new entry form.

The screenshot displays the CV navigation interface for John Doe. The left-hand navigation menu includes categories such as Personal Info, Education & Training, Postdoctoral Training, Additional Training, Certification & Licensure, Appointments, Honors, Awards & Prizes, Grants & Contracts, Professional Societies, Patents, Editorial Positions, Teaching, and Committee & Administrative. The Education & Training section is expanded, showing a table of education entries for John Doe. Two buttons are highlighted with orange boxes: '+ Add Education...' in the top right of the Education section and '+ Add Another Education' at the bottom of the table. An orange arrow points from the '+ Add Education...' button to a modal form titled 'Education'. The modal form contains fields for Program, Degree, Specialty, Mentor, Institution, City, State, Country, Start date, and End date. The Start and End date fields include calendar icons. The modal form also has 'Cancel' and 'Save changes' buttons at the bottom.

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CV HOME PRINT ▾ MANAGE EXTERNAL DATA ▾ ADMIN ▾ REPORTING ▾ CURRICULUM VITAE ▾

SmartPath

Personal Info

Education & Training ▾

**Education** ▸

Postdoctoral Training

Additional Training

Certification & Licensure

Appointments

Honors, Awards & Prizes

Grants & Contracts

Professional Societies

Patents

Editorial Positions

Teaching

Committee & Administrative

**John Doe**

Education

Help... Print this Section Download Data Requirements + Add Education...

Program	Degree	Institution	Start
Undergraduate	BS	University of California-Davis, Davis, CA	09/1994
Graduate	MD	University of South Florida-Main Campus, Tampa, FL	09/2005

+ Add Another Education

Education

Show Help

Education

\*Program:

Degree:

Specialty:

Mentor:

Institution

\*Institution:

\*City:

State:

Country:

Dates

\*Start:

End:

Cancel Save changes



Import data  
from PubMed

Claim and  
categorize your  
publications

SmartPath CV HOME PRINT **MANAGE EXTERNAL DATA** ADMIN REPORTING CURRICULUM VITAE

MPS Administrator (mpsadmin) | Logout

PubMed Import Find, Review, and Save: Last Name: simon First Name: Author First Name Affiliation: Search 25 results, 19975 remaining: Next 25 Results...

Search & Review

Reviewed: Mine (0)

Reviewed: Not Mine (0)

Save Changes

Search Results Not Yet Reviewed:

Authorship Synopsis

Mine Not Mine Barawi KS, Lewis C, **Simon** N, Bisson JI. A systematic review of factors associated with outcome of psychological treatment disorder. *European journal of psychotraumatology* 11(1): 1774240. 7/2020 33029317

Mine Not Mine Peer Reviewed Madadian MA, **Simon** S, Messiha A. Changing trends in the management of condylar fractures *maxillofacial surgery* 8/2020 33020008

Mine Not Mine de Klein CAM, Alfaro MA, Giltrap D, Topp CFE, **Simon** PL, Noble ADL, van der Weerden TJ. Global Research Alliance N<= methodology guidelines: Statistical considerations, emission factor calculation, and data reporting. *Journal of environm* 49(5): 1156-1167. 9/2020 33016448

Mine Not Mine Peer Reviewed Wajnberg A, Mansour M, Leven E, Bouvier NM, Patel G, Firpo-Betancourt A, Mendu R, Jhang J, Houldsworth J, Sordillo E, Paniz-Mondolfi A, Baine I, **Simon** V, Aberg J, Krammer F, Reich D, Cordon-Cardo C. Humoral r patients with COVID-19 in the New York City region, USA: an observational study. *The Lancet. Microbe* 9/2020 33015652

Mine Not Mine Gangwar SP, Green MN, Michard E, **Simon** AA, Feijó JA, Sobolevsky AI. Structure of the Arabidopsis Glutamate Receptor Binding Domain. *Structure (London, England : 1993)* 9/2020 33027636

Mine Not Mine **Simon** MJK, Regan WD. Bubble Sign to Confirm the Integrity of the Shoulder Rotator Cuff. *Arthroscopy techniques* 9(9): e1389-e1395. 9/2020 33024682

Mine Not Mine Troidl K, **Simon** F. [Student tuition during COVID-19]. *Gefasschirurgie : Zeitschrift fur vaskulare und endovaskulare Chirurg Osterreichischen Gesellschaft fur Gefasschirurgie unter Mitarbeit der Schweizerischen Gesellschaft fur Gefasschirurgie* 1-4. 10/2020 33024353





## Need Help?

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

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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	<a href="mailto:toni_somers@wayne.edu">toni_somers@wayne.edu</a>	<a href="#">Click here to chat.</a>
College of Education	Kierstin	Fiscus	<a href="mailto:kfiscus@wayne.edu">kfiscus@wayne.edu</a>	<a href="#">Click here to chat.</a>
College of Engineering	Rita	Gordon	<a href="mailto:rita.gordon@wayne.edu">rita.gordon@wayne.edu</a>	<a href="#">Click here to chat.</a>
College of Fine, Performing, and Communication Arts	Robin	Collins	<a href="mailto:robin.collins@wayne.edu">robin.collins@wayne.edu</a>	<a href="#">Click here to chat.</a>
	James	Thomas	<a href="mailto:JMThomas@wayne.edu">JMThomas@wayne.edu</a>	<a href="#">Click here to chat.</a>
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Law School	Adeeb	Mozip	<a href="mailto:aamozip@wayne.edu">aamozip@wayne.edu</a>	<a href="#">Click here to chat.</a>
	Robin	Johnson	<a href="mailto:rjohnson@wayne.edu">rjohnson@wayne.edu</a>	<a href="#">Click here to chat.</a>
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School of Social Work	Janie	Williams-White	<a href="mailto:williamswhite@wayne.edu">williamswhite@wayne.edu</a>	<a href="#">Click here to chat.</a>
University Libraries and the School of Information Sciences	Rachel	Beatty	<a href="mailto:ab8711@wayne.edu">ab8711@wayne.edu</a>	<a href="#">Click here to chat.</a>

