



SmartPath™ Overview Wayne State University

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

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

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, followed by 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 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 orange arrow points to the 'Name' column header, and another points to the 'Action' column for the second row. A third arrow points to the 'Create New Position...' button.

Access the roster from the navigation menu

Sort, search and filter to find the right person

Create a new position or appointment

Link directly to an "In Progress" workflow

PCN	Department	Name	Track	Title / Rank	Position / TIR	Action	Status
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 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. An orange box highlights these tabs, with an arrow pointing to the ROSTER tab. In the top right corner, the user's name 'John Doe (ofa)' and a 'Logout' link are visible. Below the navigation tabs, there is a 'WORKFLOW' dropdown menu with options for 'Workflow' and 'Curriculum Vitae'. An orange arrow points from the 'WORKFLOW' dropdown to the right. The main content area is titled 'Dashboard' and features a search bar. Below the search bar, there are several filter tabs: Workflows, Events, Tracks, Titles, and Departments. The 'Workflows' tab is selected, showing a list of items. The list has columns for 'Last Updated', 'Name', 'Department', 'Title / Rank', and 'PCN'. The first item is 'Annual Review Ready for Chair and/or Chief Review (1)' with a timestamp of '10/07/2020 02:48 AM' and a name 'Shelley Diaz'. The second item is 'Annual Review Started (3)' with a timestamp of '10/06/2020 02:20 AM' and a name 'Shelley Diaz'. The third item is '09/30/2020 06:27 PM' with a name 'Shelley Diaz'. The fourth item is '09/30/2020 04:14 PM' with a name 'Melba Brooks'. An orange arrow points from the 'REPORTING' tab to the 'Annual Review Started (3)' item.

John Doe (ofa) | Logout

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	✕

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: Annual Review
Events: Annual Review Read...
Tracks: Clinical, Research
Titles: Clinical Professor, ...
Departments: Family and Community Me... [Select All](#)

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	X
Annual Review Started (3)					
10/06/2020 02:20 AM	Shelley Diaz	Medical Education	Research Assistant Professor	15-00001	X
09/30/2020 06:27 PM	Shelley Diaz	Medical Education	Research Assistant Professor	15-00001	X
09/30/2020 04:14 PM	Melba Brooks	Family and Community Medicine	Clinical Professor	04-00001	X

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 lists faculty members with columns for PCN, Department, Name, Track, Title / Rank, Position / TIR, Action, and Status. The first row is highlighted for 'Holland, Rosa' in the Emergency Medicine department. A callout box provides a detailed view of this position, including columns for PCN, Department, Track, Title, Action, Status, Start Date, End Date, Last Update, and Actions. The 'Actions' dropdown menu is open, showing options like 'Faculty Evaluation...' and 'Termination...'. A 'Show 50 rows' option is visible at the bottom left.

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						

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

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 'New Position' modal is open, prompting the user to 'Provide details below to create a Position:'. The modal has a 'Department & Title' section with a list of department options, a 'Track' dropdown set to 'Instructional', and a 'Title' dropdown set to 'Open'. A 'Create Position' button is at the bottom right 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:
Faculty Forms: <ul style="list-style-type: none">+ 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	Chair and/or Chief Review: <ul style="list-style-type: none">View Annual ReviewChair and/or Chief ApprovalChair Review and CommentsNext Year's Department Goals Candidate Review: <ul style="list-style-type: none">View Annual ReviewCandidate Acknowledgement	Complete Annual Review: <ul style="list-style-type: none">Complete Annual Review

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



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

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 'Appointment (Adjunct) Status: Review Complete' for 'Wayne Lai (ccc)'. A circular progress indicator shows '57%' and '19 of 33' items. On the right, the candidate's role is listed as '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 for '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

Review:

Appointment Overview > Activity Log

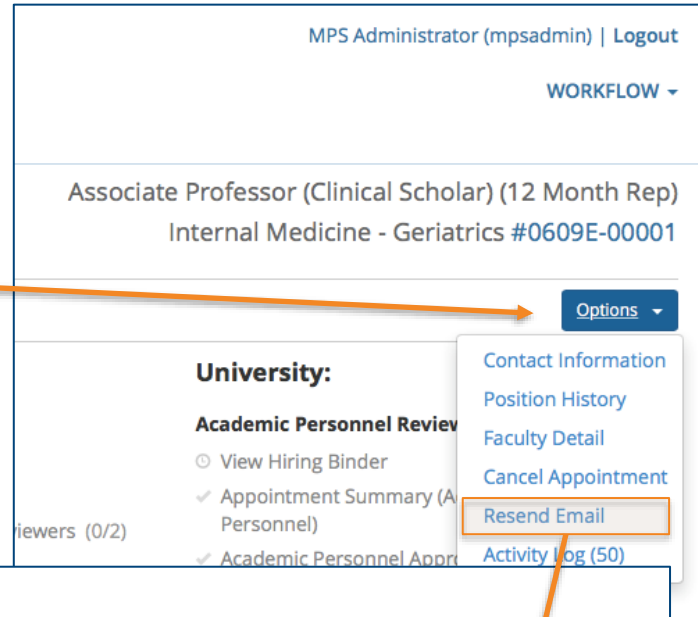
10/18/2020 12:46 PM:	MPS Administrator (mpsadmin): Background Check Submitted
10/18/2020 12:45 PM:	MPS Administrator (mpsadmin): Official Candidate Transcript or Professional License Complete
10/18/2020 12:45 PM:	MPS Administrator (mpsadmin): Candidate CV (signed and dated by candidate) Complete
10/18/2020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

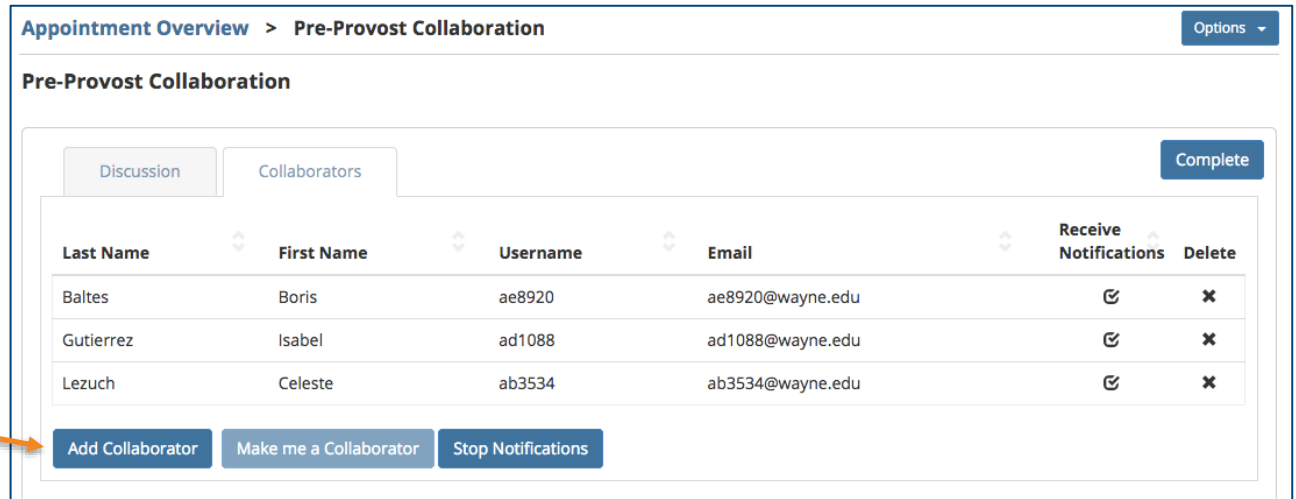
An orange arrow points from the 'Resend Email' option in the dropdown menu to the 'Resend Email' table below.

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 the user (10/18/2020 10:51 AM) replying 'I'll send out a revision request to the department.' Below the comments is an 'Add Comment' section with a text input field 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 as 'MPS Administrator (mpsadmin) | Logout' and a 'WORKFLOW' dropdown menu. The main content area shows details for an 'Associate Professor (Clinical Scholar) (12 Month Rep)' in 'Internal Medicine - Geriatrics #0609E-00001'. An 'Options' button is visible, which has been clicked to reveal a dropdown menu. The menu items are: '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' menu item. Below the main content, a 'Cancel Job Action' dialog box is open. It contains the following text: 'Cancel Job Action', '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' menu item to the 'Cancel Job Action' dialog box.



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 ▾

← 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.
- 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)
 Appointment (School of Medicine only)

Track: Ineligible - A2

Title: Instructor - Clinical (12 Month Rep)

[Delete Position](#) [Start Action](#)

 DASHBOARD ROSTER ADMIN REPORTING

Roster

[Create New Position...](#)

Select All | Search All:

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

PCN	Department	Name	Track	Title / Rank	Position / TIR	Action	Status
<input type="text"/>	All Departments	<input type="text"/>	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:

Action:

Appointment Start Date:

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 *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) 
- ✓ 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

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

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.





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

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 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:

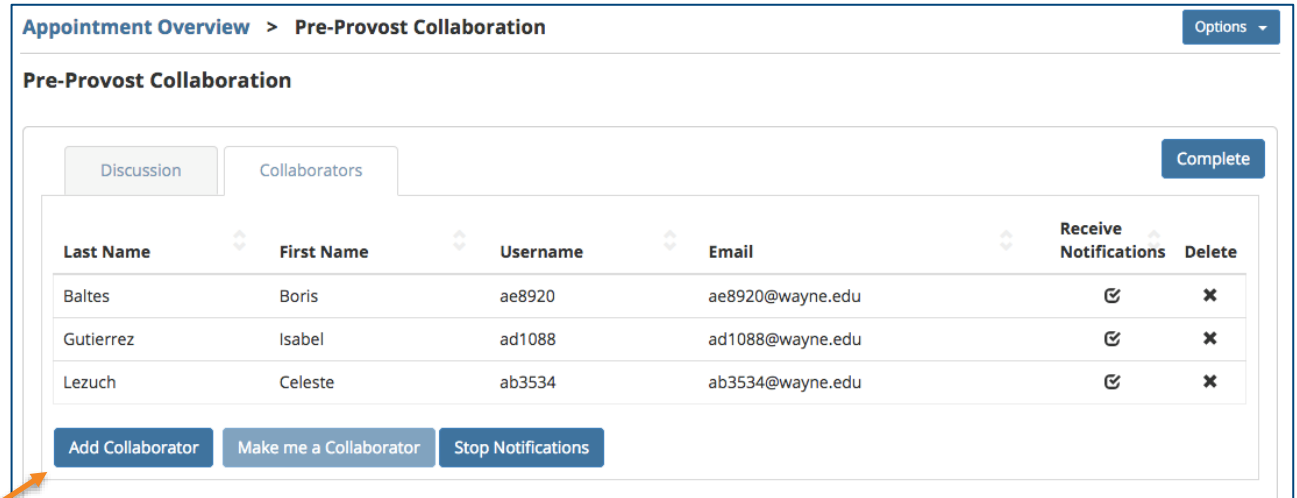
- ↓ View Hiring Binder
- + Appointment Summary (Budget)
- + Final Financial Responsibility Form (Excel)
- + Final Financial Responsibility Form (PDF)
- + Academic Administration Approval



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 tab area. The main content is a table with the following columns: Last Name, First Name, Username, Email, Receive Notifications, and Delete. The table contains three rows of data:

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

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.



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 #0110-00002. Below this, there are links for Appointment Overview and Pre-Provost Collaboration, along with an Options menu. The Pre-Provost Collaboration section features two tabs: Discussion and Collaborators. A 'Complete' button is located in the top right of this section. The discussion thread shows a comment from Celeste Lezuch (ab3534) dated 10/18/2020 at 10:50 AM: "I have a question regarding the Offer Letter...". A response from the user, dated 10/18/2020 at 10:51 AM, states: "I'll send out a revision request to the department." Below the comments is an 'Add Comment' section with a text input field and a 'Submit' button.



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

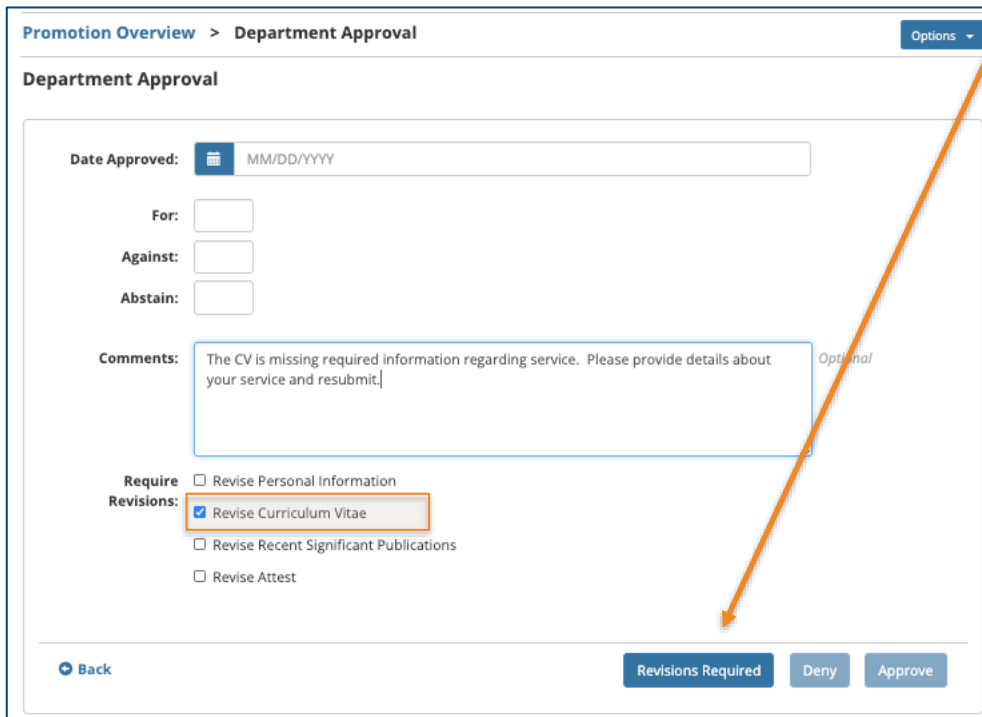
- You can download the BAO's signed FRF spreadsheet by clicking on the link in the second column of the workflow under "Business Affairs Officers Review."
- If there are changes to the FRF, these will be handled via phone conversation with the BAO.
- Academic Administration will upload final FRF, in 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.



The screenshot displays the 'Department Approval' workflow interface. At the top, it shows 'Promotion Overview > Department Approval' and an 'Options' dropdown. The main section is titled 'Department Approval'. It includes a 'Date Approved' field with a calendar icon and 'MM/DD/YYYY' placeholder. Below are 'For:', 'Against:', and 'Abstain:' input fields. A 'Comments' section contains a text box with the message: 'The CV is missing required information regarding service. Please provide details about your service and resubmit.' To the right of the text box is a small 'Optional' label. Underneath the comments is a 'Require Revisions:' section with four checkboxes: 'Revise Personal Information', 'Revise Curriculum Vitae' (which is checked and highlighted with an orange border), 'Revise Recent Significant Publications', and 'Revise Attest'. At the bottom, there are three buttons: 'Back', 'Revisions Required' (highlighted in blue), and 'Deny' and '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'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...

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.

