SmartPath™ Overview
Wayne State University
School of Medicine

Fall 2020
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
STARTING ON MONDAY OCTOBER 26TH, 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.mtnpass.com/mps/login
Username: your WSU AccessID
Password: your associated password
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:
  o Edit (complete steps; upload documents)
  o View (can see all information, but not make any changes)
  o Overview only (step label is grayed out and cannot see any information about the step)
  o None (step is hidden from view)
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
### Dashboard

#### Workflows
- Annual Review

#### Events
- Annual Review Read... (1)

#### Tracks
- Clinical, Research

#### Titles
- Clinical Professor, ...

#### Departments
- Family and Community Medicine...

#### Last Updated
- 10/07/2020 02:48 AM

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
<th>Title / Rank</th>
<th>PCN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelley Diaz</td>
<td>Medical Education</td>
<td>Research Assistant Professor 15-00001</td>
<td></td>
</tr>
</tbody>
</table>

#### Annual Review Started (3)
- 10/06/2020 02:20 AM
- 09/30/2020 06:27 PM
- 09/30/2020 04:14 PM

Switch from Workflow to other modules, if available

Switch between Dashboard and Roster and access Reporting, if available
### Dashboard

#### Workflows
- **Annual Review**
- **Events**
  - Annual Review Read...
- **Tracks**
  - Clinical, Research
- **Titles**
  - Clinical Professor, ...
- **Departments**
  - Family and Community Medicine

#### Last Updated
- **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

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**Notifications**

Notifications alert you to action required.

**Link directly to a workflow if needed**
SmartPath Workflow Overview
Initiate New Workflows for a Current Faculty Member

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

Select workflow to initiate

<table>
<thead>
<tr>
<th>PCN</th>
<th>Department</th>
<th>Track</th>
<th>Title / Rank</th>
<th>Action</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Last Update</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>03-00001</td>
<td>Emergency Medicine</td>
<td>Clinical</td>
<td>Clinical Associate Professor</td>
<td>None</td>
<td>Current</td>
<td>08/01/2017</td>
<td>07/31/2021</td>
<td>09/27/2020 07:29 PM</td>
<td>Faculty Evaluation... Termination...</td>
</tr>
<tr>
<td>11-00001</td>
<td>Radiology</td>
<td>Clinical</td>
<td>Clinical Associate Professor</td>
<td>None</td>
<td>Current</td>
<td>10/08/2017</td>
<td>12/31/2018</td>
<td>09/27/2020 07:29 PM</td>
<td>Faculty Evaluation... Termination...</td>
</tr>
</tbody>
</table>
Creating New Workflows

Roster

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

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

New Position
Provide details below to create a Position:

Department:
- Medical School (2300000)
- MSA-Administration (2310000)
- Computational Medicine & Bioinformatics (231639)
- Cell and Developmental Biology (2320000)
- Anesthesiology (2330000)
- Biological Chemistry (2340000)
- Dermatology (2350000)
- Family Medicine (2355000)
- Human Genetics (2360000)
- Internal Medicine (236999)
- Administration (2370000)
- Allergy (2375000)

Track: Instructional
Title: Open

Create a new position and appointment
Enter key position/appointment attributes
Locking and unlocking steps

- 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.

- 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.

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

Last Year's Effort Assignment

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

Options
Print...
Save as Draft
Save

Clinical Associate Professor
Emergency Medicine #03-00001

This step uses a SmartForm to capture required information.
- 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.
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

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

- Once corrections are made and resubmitted, the packet will move through the approval process again.
### Workflow: Managing Evaluations

#### Manage Evaluations

<table>
<thead>
<tr>
<th>Status</th>
<th>Evaluator</th>
<th>Email</th>
<th>Type</th>
<th>Suggested</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Approved</td>
<td>Mariah Simpkins</td>
<td><a href="mailto:msimpkins@gvsu.edu">msimpkins@gvsu.edu</a></td>
<td>External Arm's Length</td>
<td>Chair/Chief</td>
<td>Action ▶</td>
</tr>
<tr>
<td>☑ Approved</td>
<td>Kaitlyn Beckett</td>
<td><a href="mailto:kbeckett@cmu.edu">kbeckett@cmu.edu</a></td>
<td>External Arm's Length</td>
<td>Chair/Chief</td>
<td>Action ▶</td>
</tr>
<tr>
<td>☑ Approved</td>
<td>Ulysses Winchester</td>
<td><a href="mailto:uwinchester@cornell.edu">uwinchester@cornell.edu</a></td>
<td>External Arm's Length</td>
<td>Chair/Chief</td>
<td>Action ▶</td>
</tr>
<tr>
<td>☑ Approved</td>
<td>David Loki</td>
<td><a href="mailto:dloki@osu.edu">dloki@osu.edu</a></td>
<td>External Arm's Length</td>
<td>Chair/Chief</td>
<td>Action ▶</td>
</tr>
<tr>
<td>☑ Approved</td>
<td>Cynthia Stevens</td>
<td><a href="mailto:cstevens@harvard.edu">cstevens@harvard.edu</a></td>
<td>External Arm's Length</td>
<td>Chair/Chief</td>
<td>Action ▶</td>
</tr>
<tr>
<td>Uploaded on 09/27/2020 07:05 PM</td>
<td>Holly VanderKool</td>
<td><a href="mailto:hvanderk@myuniv.edu">hvanderk@myuniv.edu</a></td>
<td>Internal</td>
<td>Candidate</td>
<td>Action ▶</td>
</tr>
<tr>
<td>Uploaded on 09/27/2020 07:05 PM</td>
<td>Ingrid Biggs</td>
<td><a href="mailto:ibiggs@myuniv.edu">ibiggs@myuniv.edu</a></td>
<td>Internal</td>
<td>Candidate</td>
<td>Action ▶</td>
</tr>
<tr>
<td>Uploaded on 09/27/2020 07:05 PM</td>
<td>Renee Andrews</td>
<td><a href="mailto:randrews@umich.edu">randrews@umich.edu</a></td>
<td>Undergraduate Student</td>
<td>Candidate</td>
<td>Action ▶</td>
</tr>
<tr>
<td>Uploaded on 09/27/2020 07:06 PM</td>
<td>Angela Brown</td>
<td>angela <a href="mailto:brown@umich.edu">brown@umich.edu</a></td>
<td>Undergraduate Student</td>
<td>Candidate</td>
<td>Action ▶</td>
</tr>
</tbody>
</table>

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

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*Track progress by evaluator type*

*Create and manage a list of evaluators and track status*
• 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.
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.
- 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.
• 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 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!').
Canceling a Workflow

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

2. 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).
The Salary Justification is a new requirement for the Provost's Office binder.
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.
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.
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
  o 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
- Facilities Form
- Justification for more than two-year initial appointment
- Salary Justification
- Moving Expense Form (over $10K)
- Approved OEO Forms - Candidate Selection
- Draft Financial Responsibility Form (Excel)
- Draft Financial Responsibility Form (PDF)

Letter of Offer:
- Approved & Signed MOA/MOU

Business Affairs Officers Review:
- View Hiring Binder
- Position Action Request Approved by Optional BAO
- Signed Financial Responsibility Form (Excel)
- Signed Financial Responsibility Form (PDF)

• 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.
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.
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.
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.

• 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.
• 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.
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

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

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

- 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.

- 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.”
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.
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.”
Overview
Workflow: Requesting revisions

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

- 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.

- 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 contain 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.
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.”
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!’)
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.
**Workflow: Requesting revisions**

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

- 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.

- Once corrections are made and resubmitted, the packet will move through the approval process again.
WSU Appointment Workflow: For the Provost
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.
Overview
Workflow: Requesting revisions

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

- 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.

- Once corrections are made and resubmitted, the packet will move through the approval process again.
• 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.
### PubMed Import for publications

**Import data from PubMed**

**Claim and categorize your publications**

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<th>Last Name</th>
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<td>Simon MJK.</td>
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# Need Help?
If you have any questions or need any assistance, please contact your school/college representative.

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<tr>
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<td>Mike Ilitch School of Business</td>
<td>Toni</td>
<td>Somers</td>
<td><a href="mailto:toni_somers@wayne.edu">toni_somers@wayne.edu</a></td>
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<td>Ken</td>
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<td>Eugene Applebaum College of Pharmacy &amp; Health Sciences</td>
<td>Dawn</td>
<td>Waltz</td>
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<td>School of Social Work</td>
<td>Janie</td>
<td>Williams-White</td>
<td><a href="mailto:williamswwhite@wayne.edu">williamswwhite@wayne.edu</a></td>
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<tr>
<td>University Libraries and the School of Information Sciences</td>
<td>Rachel</td>
<td>Beatty</td>
<td><a href="mailto:ab8711@wayne.edu">ab8711@wayne.edu</a></td>
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