PawPrint for Faculty Hiring Packets Departmental Assistant's Guide (July 2016)

Overview

Welcome to PawPrint (https://pawprint.med.psu.edu/PawPrint/), a web based utility for electronically signing documents. Users can upload documents and specify who needs to sign them. Then those people log into PawPrint and sign the document. Email notifications are sent to signees as soon as it is their turn to sign the document. In order to use PawPrint you must have a Penn State Access Account.

You must use PawPrint for new faculty hires that are **new to the University.** Do not use PawPrint for department transfers.

This is a step by step guide on how to upload a faculty hiring packet and resolve issues raised by signatories ('rejections'). PawPrint has 'help' integrated throughout the website. Every page has a ⊙Help link in the upper right hand corner. Please note: Google Chrome is the recommended browser for PawPrint. If you do not have access to Google Chrome, Firefox is the second choice. Internet Explorer is not recommended, as users have reported errors when accessing PawPrint from Internet Explorer. Depending on your choice of browser, the images that appear in this guide may not be an exact replica of what you see on your screen.

If you have questions or require assistance with the PawPrint workflow process, please contact Becky Moyer at rmoyer7@hmc.psu.edu or Ext. 4565.

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Updating Your Profile

Upon your first entry into PawPrint, you will be directed to the Profile page. If you are not automatically directed, you will need to click on the 'Profile' button.

Here you may edit your first and last names and email address.
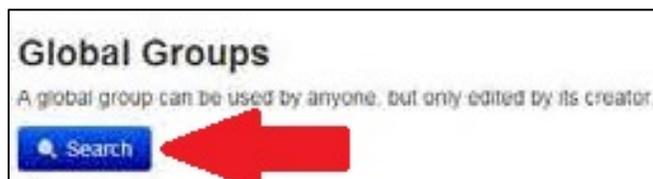
Subscribing to a Global Group

For each faculty hiring packet you upload, you must select a global group maintained by the Office of Faculty Affairs. The global groups contain the names of the signatories who must review and sign off on the hiring packet. **It is very important that you select the appropriate global group dependent upon the type of employment hire (clinical vs. basic science).** If the candidate is a clinician, select the global group for <mark>clinical faculty</mark>. If the candidate is a basic scientist, select the global group for <mark>basic science faculty</mark>.

1. Log into PawPrint at pawprint.med.psu.edu, if you have not already done so.

2. Click on 'Groups' in the navigation bar, if you are not already on the 'Groups' page.

3. Click the 'Search' button.

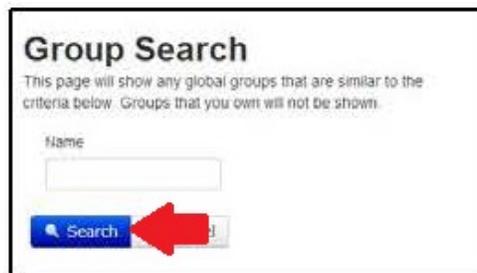## Subscribing to the Clinical Faculty Global Group:

1. Enter 'Clinical Faculty Hiring Packet' into the 'Name' field if the candidate is a clinician.

2. Click 'Search'.

3. Click on the 'Subscribe' button adjacent to the group named 'Clinical Faculty Hiring Packet'.

4. You are now subscribed to the group. This is a one-time procedure and will not need to be repeated in future log-ins.

Subscribing to the Basic Science Faculty Global Group:

1. Enter 'Basic Science Faculty Hiring Packet' if the candidate is a basic scientist.
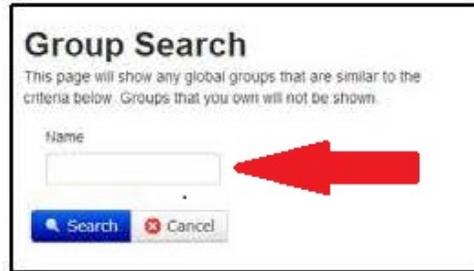
2. Click 'Search'.

Group Search

This page will show any global groups that are similar to the criteria below. Groups that you own will not be shown.

Name

[   ]

🔍 Search

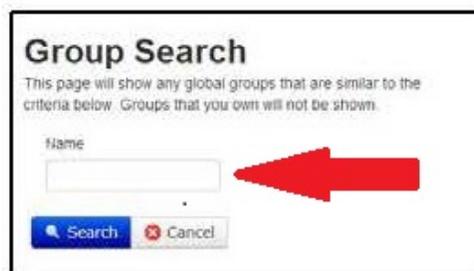3. Click on the 'Subscribe' button adjacent to the group named 'Basic Science Faculty Hiring Packet'.

4. You are now subscribed to the group. This is a one-time procedure and will not need to be repeated in future log-ins.

Uploading a Faculty Hiring Packet

1. Log into PawPrint at pawprint.med.psu.edu, if you have not already done so.

2. Click on 'Upload' in the navigation bar, if you are not already on the 'Upload Document' page.

3. Enter the faculty hiring packet's title into the 'Document Title' field. ==The naming convention that must be used is: 'Faculty Hiring Packet Last Name First Name'.==

Document Title*

Note: The document title may not be more than 100 characters long.

4. To create your notification e-mail subject line, you must click 'Use Title'. This will populate your document title into the subject line for the notification e-mail that signees will receive. However, the text will not appear on this screen.

Notification Email Subject Line

Use Title - OR - Enter custom subject here.

Note: Not selecting "Use Title" and leaving the field blank will cause PawPrint to use a default subject when sending emails.

5. Check 'Allow signees to delegate their signatures to other users.' You MUST choose this option.

☐ Prompt signees to re-enter their password when signing the document.

☑ Allow signees to delegate their signatures to other users.

6. PawPrint defaults to automatically remind signees via e-mail every 2 days until signed. These settings are pre-selected, and you don't need to take any action on this section.

☑ Email signees a reminder every [2] days until signed.

7. Select the hiring packet to upload by clicking the 'Browse' or 'Choose File' button. Depending on your computer settings, the exact wording may vary. The hiring packet must be a PDF file with cover sheet and documents in the order required by the Office of Faculty Affairs (available at Medical Staff Office website or Faculty Affairs website)

Select the document to upload*
[Choose File] hosen
Note: The file must be a DOC, DOCX, or PDF.

8. Using the 'Select the signees' dropdown select these signees **in the following order**:

1) The global group you selected in the previous section ('Clinical Faculty Hiring Packet' or 'Basic Science Faculty Hiring Packet')

2) 'Hillemeier, Craig' **(Pay attention to the order in which you select Dr. Hillemeier, as he must be listed last. This is critical)**

'Select the signees
[Select] [Can't find someone?]

Clinical Faculty Hiring Packet   remove
Hillemeier, Craig   remove
Note: You can drag and drop signees to re-order the list

9. Click 'Save'.

10. The hiring packet has been uploaded.

Using the "Authorize" Function

'Authorize' helps you control who has access to your document. Anyone listed as 'Authorized' can view the document, while people who can 'Edit' the document will have access to everything except the capability to authorize other users. Everyone listed as 'Authorized' will receive e-mails about the document's status. You may authorize another user at any point after uploading the document. If desired, you may choose multiple authorized users.

1. Log into PawPrint at pawprint.med.psu.edu, if you have not already done so.
2. Click on 'Documents' in the navigation bar, if you are not already on the 'Documents' page.

3. Click the document title for which you want to authorize another user.
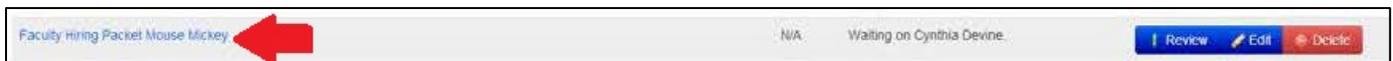
4. Click the 'Authorize' button.

5. Under 'Authorize', you may choose the correct name from the drop-down list.

6. If the correct name is not in the drop-down list, choose 'Can't find someone?'
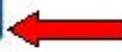
- Then, type in the first and last name and click 'Search'.

- Choose 'Invite' next to the correct name.

- Choose "OK" in the pop-up window

The page at https://pawprint.med.psu.edu says:

By clicking OK, Clarissa Callen Slater will automatically receive an email invitation from you.

OK   Cancel

- PawPrint will automatically send an invitation e-mail to the identified person's PSU e-mail address. The name will now appear as a selection in the drop-down list.

7. Choose 'Save'

Save

8. PawPrint will default to 'View Only' authorization level. **If you want the user to be able to EDIT the document, you must choose 'Edit & View', and then choose 'Save' again.**

9. PawPrint will send an e-mail notification to the authorized user stating that they now have access to the document.

10. To remove an authorization, choose 'Remove' on the Authorization screen.

11. Choose "OK" in the pop-up window.

12. The user will receive a notification e-mail from PawPrint stating that their authorization for this document has been removed.

Resolving a Rejection

If there is an identified issue or problem with any information in the hiring packet, a signee may choose to 'reject' it. An e-mail notification will be generated and sent to the uploader to alert you to the rejection. This e-mail will include the reason for the rejection. To resolve the rejection, you need to revise the packet to address the issue and re-upload the entire revised version as detailed below. Note, please do not upload single pages; the entire packet must be re-uploaded.

Please note: the "Edit" function should be used ONLY for resolving rejections. Please ensure accuracy in your initial submission; if a change must be made in the packet for reasons other than a rejection, the packet should be withdrawn and a new upload created.

1. Log into PawPrint at pawprint.med.psu.edu, if you have not already done so.
2. Click on 'Documents' in the navigation bar, if you are not already on the 'Documents' page.


3. Click the 'Edit' button adjacent to the document for which you want to resolve a rejection.
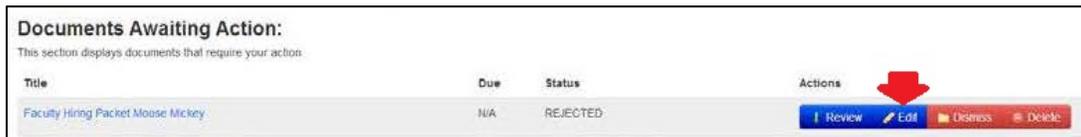
4. Please note: the document title should be pre-populated text reflecting your previously entered information. You should not need to re-enter or change this information.
5. When you are ready to upload your revised, scanned, PDF packet, select the revised document by clicking the 'Browse' or 'Choose File' button. Depending on your computer settings, the exact wording may vary.
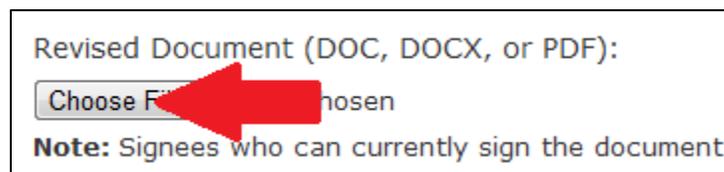
6. Check the checkbox beside the rejection that you want to resolve. <mark>NOTE: If you see an option to "Restart the Workflow", do NOT choose this option. There is no circumstance in which you should use "Restart the Workflow".</mark>
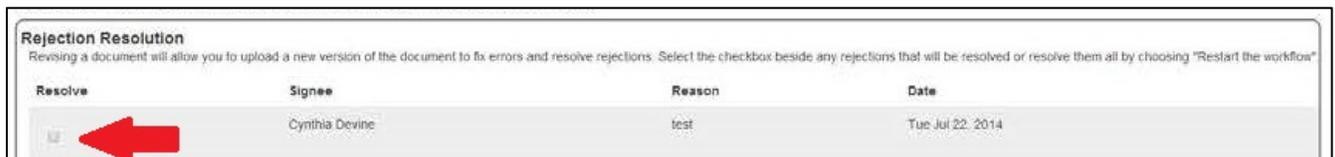
7. Click 'Save'.

8. The new document will be sent to the signatories for their review and signature.

Document Approval (Certification)

When all signees have approved the packet, you will receive an e-mail from PawPrint alerting you that the packet has been approved. At that time, you need to enter PawPrint and print the certification page.

1. Log into PawPrint at pawprint.med.psu.edu, if you have not already done so.
2. Click on 'Documents' in the navigation bar, if you are not already on the 'Documents' page.

3. Under the section 'Recent Documents', you will see all of your recent uploaded documents. Find the document title that was just approved, and click on 'Print Cert' next to the title.

4. The certification page will serve as documentation of approval to proceed with making the faculty hire. It is essential that you keep a copy of this certificate with your faculty hiring paperwork. It needs to be included with the Position Requisition Form packet (HMC) or Personnel Action Form packet (COM) after the candidate has accepted the position and these packets are submitted to the Dean's Office for signature.

If you have questions or require assistance with the PawPrint workflow process, please contact Becky Moyer at rmoyer7@hmc.psu.edu or Ext. 4565.

Tips

1. For HMC-employed faculty hiring packets, please reference the "Checklist" available on the Medical Staff Office website for a list of documents that should be included with the uploaded packet. (LINK: https://infonet.pennstatehershey.net/web/medical-staff-office/faculty-and-advanced-practice-appointment-process/physician-appointment-process)

2. For COM-employed faculty hiring packets, please reference the "Basic Science Faculty Hiring Instructions" available on the Faculty Affairs website for a list of documents that should be

included with the uploaded packet. (LINK:
http://www.pennstatehershey.org/web/facultyaffairs/home/recruitment)

3. **Fixed Term I Faculty appointments for PSHMC clinicians:** The appointment end date should always be June 30 of the appropriate academic year.