



TEMERTY FACULTY OF MEDICINE
UNIVERSITY OF TORONTO

Guide to Academic Appointments

Using Web Forms and LaserFiche

Clinical Department Coordinators Version

Discovery Commons

August 2021

Table of Contents

When to Use the LaserFiche Online Appointments System	3
Introduction to the Components of the Appointments System	4
Which Modules Do I Use.....	6
Logging in to the Modules of the Appointments Application.....	7
The Appointments Process	10
Step-by-Step:.....	10
Changing the Status of a Dossier	19
Uploading Documents Directly into LaserFiche.....	21
Regenerating the Appointments PDF	21
Column Headings – Refining your View, Sorting your Lists	22
Letters of Offer.....	25
Generate Letters of Offer (Using LaserFiche Web Access):	26
<i>Re-create the Letter of Offer Template</i>	26
Make Changes to a Letter of Offer:	31
Department Address and Chair’s Name and Email:.....	31
E-Mail Letters of Offer:	32
E-Mailing Other Documents Directly From LaserFiche.....	33
Appendix A - Quick Reference to Appointments System Websites.....	36
Appendix B – Clinical Appointments Workflow	37
Appendix C – Other Academic Appointments Workflow	38

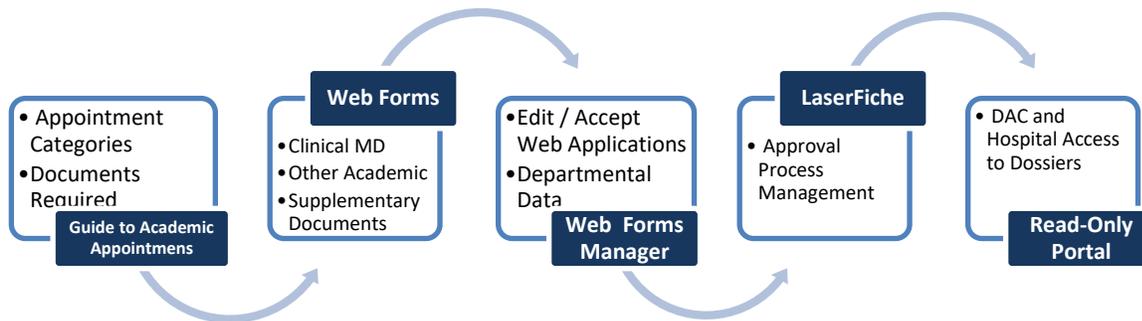
When to Use the LaserFiche Online Appointments System

- All Clinical MD appointments including foreign-trained physician appointments, and clinical cross appointments
- Junior Promotions (this refers solely to clinical appointments where the applicant is moving from the rank of Lecturer to Assistant Professor)
- Status-Only Appointments
- Non-budgetary cross appointments
- Adjunct and Visiting Appointments
- Part-time appointments

Note: Tenure, Tenure-stream, Contractually-Limited Term Appointments (CLTAs), and Teaching-stream appointments are still processed through the university's TALEO system.

Introduction to the Components of the Appointments System

The Appointments Workflow is carried out over 5 different, but inter-related modules. These will be described in more detail as we go through the Appointments workflow but the following is a brief description of the role each application plays in the system.



1. The Guide to Academic Appointments (<http://aca.med.utoronto.ca/>) will guide you, in a step-by-step process, to the correct appointment category for your candidate and will show a list of the list of documents required in each appointment category's application package. The Guide also contains links to online application forms and to other helpful information.

2. Online Application Forms (2) and the Supplementary Document Submission form (1). By using these online forms an appointment candidate (or their agent) can apply for an academic appointment AND submit many of the required documents for the appointment. Links to these web forms are in the above-mentioned Guide to Academic Appointments but their URLs may be bookmarked or placed in other information pages for quick access. These online application forms supersede the paper application posted in the HR toolbox. Submission and subsequent acceptance of an online application form triggers a sequence of events in LaserFiche that result in a dossier (folder) being created for the applicant and the insertion of any documents attached to the application form into that dossier. There are 2 online applications form, one for clinical MD appointments and one for non-MD appointments.

The Supplementary Document Submission form is used to submit supplementary documents to a dossier that has already been created (i.e. through the acceptance of an application form).

Here are the URLs for the forms:

Application Form for Clinical MD Appointments:

<http://documents.med.utoronto.ca/forms/clinical>

Application Form for Other Academic (non-MD) Appointments:

<http://documents.med.utoronto.ca/forms/nonclinical>

Form For Submitting Supplementary Documentation:

<http://documents.med.utoronto.ca/forms/appointmentdocs>

3. WebForms Manager: Using the Online Forms Manager

(<http://documents.med.utoronto.ca/forms>) the Departmental Coordinators (DCs) can review the submitted applications forms, correct them if necessary, add information to the form, reject or place a form on hold, or accept a form. When an application form is accepted several functions begin, not the least of which is the automatic creation of a dossier for the candidate in LaserFiche document system. All of the functions that take place when a form is accepted are described in detail in **The Appointments Workflow** section of this manual.

4. LaserFiche: (<http://documents.med.utoronto.ca/laserfiche>) LaserFiche is the central document management system for this project. LaserFiche is configured to allow key staff members (e.g. department coordinators, Human Resources staff and the Dean or the Dean's representatives) to route application packages through an approval process. It will accept, store and display documents for an appointment candidate, create unique ID numbers, allow changes to the access rights on document sets, record workflow events, create personalized Letters of Offer (if desired), and send notification e-mails, with attachments, to various stakeholders throughout the approval process.

5. Read-Only Portal: The Read-only Portal (<http://documents.med.utoronto.ca/appointments>) allows persons who are not licensed to use the full version of LaserFiche to view the documents in a candidate's dossier. It is used as part of the approval process mentioned above. The department coordinator can control when documents become visible on the Read-only Portal, and to whom. This portal will be used by members of Departmental Appointments Committees (DACs), Hospital Coordinators (HC), and by members of the Faculty Appointments Advisory Committee (FAAC) to view the contents of a dossier.

Which Modules Do I Use

Guide to Academic Appointments
Everyone

Online Applications / Document Submission
Applicants (or their Agents) Department Coordinators (DCs) Hospital Contacts (HC)

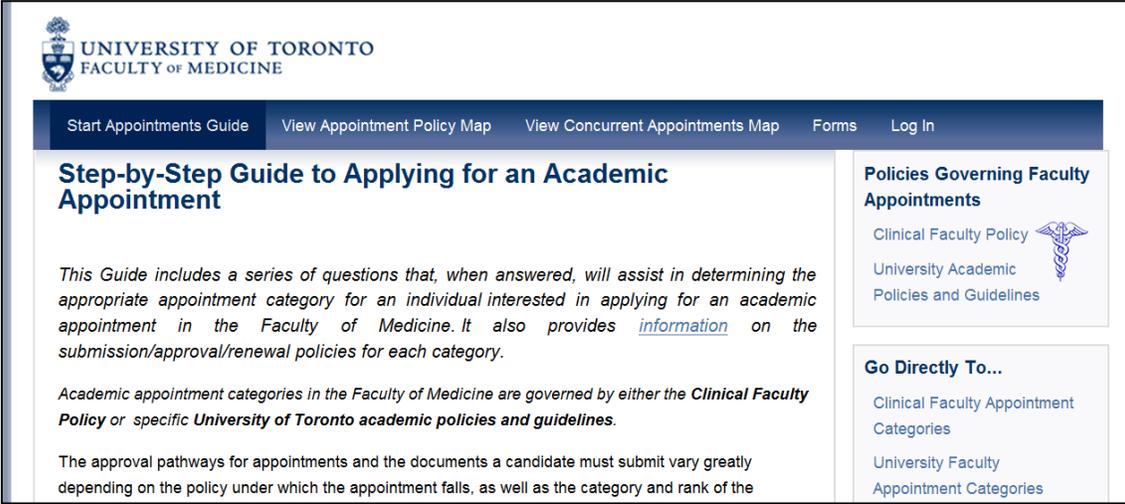
Web Forms Manager
Department Coordinators (DCs)

LaserFiche Appointments System
Department Coordinators (DCs) Human Resources Reviewer (HR) Dean / Vice Dean / Chair of FAAC

Read-Only Portal
Departmental Appointments Committee Members (DAC) FAAC Committee Members Hospital Coordinators (HC)

Logging in to the Modules of the Appointments Application

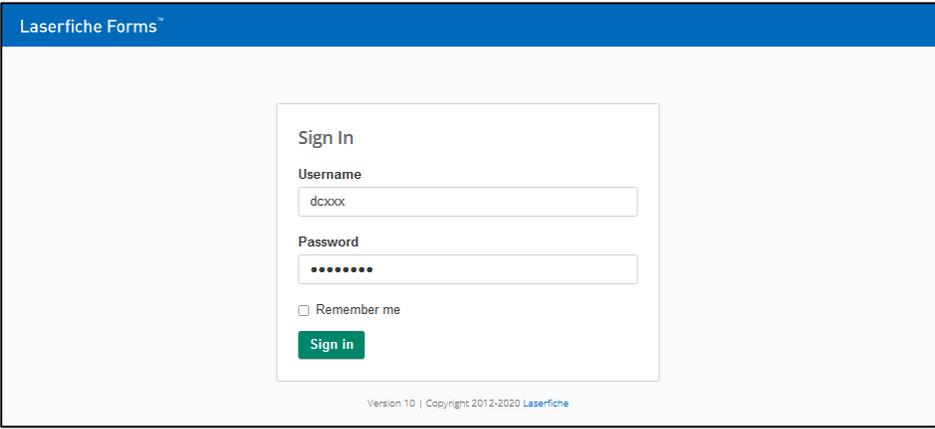
1. **The Guide to Academic Appointments** (<http://aca.med.utoronto.ca/>) requires **no login**; it is open to the public.



The screenshot shows the University of Toronto Faculty of Medicine website. The header includes the university logo and name. A navigation bar contains links: Start Appointments Guide, View Appointment Policy Map, View Concurrent Appointments Map, Forms, and Log In. The main content area features a large heading: "Step-by-Step Guide to Applying for an Academic Appointment". Below this heading is a paragraph of text: "This Guide includes a series of questions that, when answered, will assist in determining the appropriate appointment category for an individual interested in applying for an academic appointment in the Faculty of Medicine. It also provides information on the submission/approval/renewal policies for each category." Another paragraph follows: "Academic appointment categories in the Faculty of Medicine are governed by either the Clinical Faculty Policy or specific University of Toronto academic policies and guidelines." A final paragraph states: "The approval pathways for appointments and the documents a candidate must submit vary greatly depending on the policy under which the appointment falls, as well as the category and rank of the". To the right of the main content, there are two sidebar sections. The first is titled "Policies Governing Faculty Appointments" and contains links for "Clinical Faculty Policy" and "University Academic Policies and Guidelines" with a medical symbol. The second is titled "Go Directly To..." and contains links for "Clinical Faculty Appointment Categories" and "University Faculty Appointment Categories".

2. **Web Submission Forms:** The Applications Forms do not require a log in. The Supplementary Data forms do not require a log in, but they do have a required field for the unique ID number of the appointment candidate. This unique ID is generated when an application form is accepted by the department coordinator, causing a dossier to be created in LaserFiche.

3. **WebForms Manager:** (<http://documents.med.utoronto.ca/forms>). This is an online application; there is no desktop version of this application. Only the Departmental Coordinator (DC) has access to the WebForms Manager. You will be prompted to log-in. Your username is **dcxxx** where xxx is your departments Org unit. For example: dc999. Password (to begin) = password.



The screenshot shows the Laserfiche Forms login page. The page has a blue header with the text "Laserfiche Forms™". The main content area is white and contains a "Sign In" form. The form has two input fields: "Username" with the text "dcxxx" and "Password" with a masked password "*****". Below the password field is a checkbox labeled "Remember me" which is unchecked. At the bottom of the form is a green "Sign in" button. At the very bottom of the page, there is a small footer that reads "Version 10 | Copyright 2012-2020 Laserfiche".

If you have questions about your login and password, you may contact **Libby Shirriff** (libby.shirriff@utoronto.ca), **Donna Deak** (d.deak@utoronto.ca) or Tery van Taack (tery.vantaack@utoronto.ca) of Human Resources.

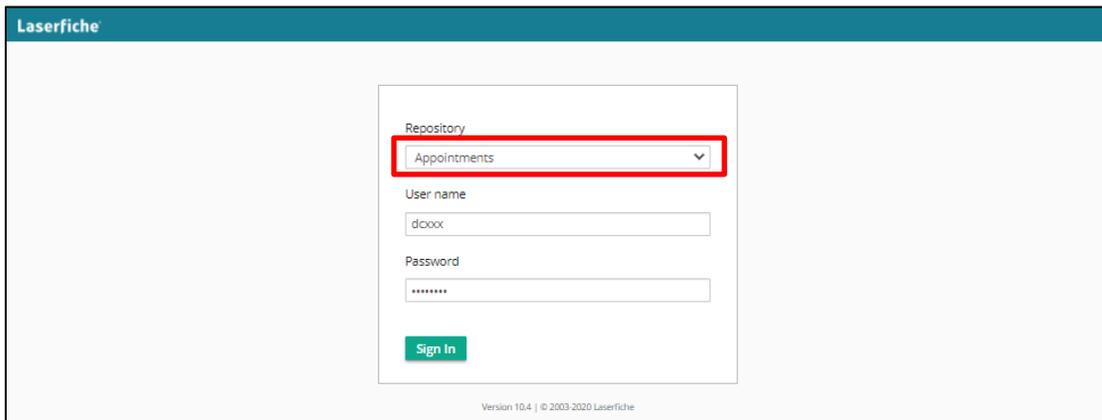
4. **LaserFiche:** (<http://documents.med.utoronto.ca/laserfiche>).

The Department Coordinators (DC), the Human Resources Coordinators (HR), the Dean, the Vice Dean of Clinical Affairs, and the Chair of the FAAC will use a web-based application (web client) to administer the Academic Appointments process.

For Department Coordinators, your username is **dcxxx** where xxx is your department's Org unit. For example: dc999. Your password, initially, is *password*.

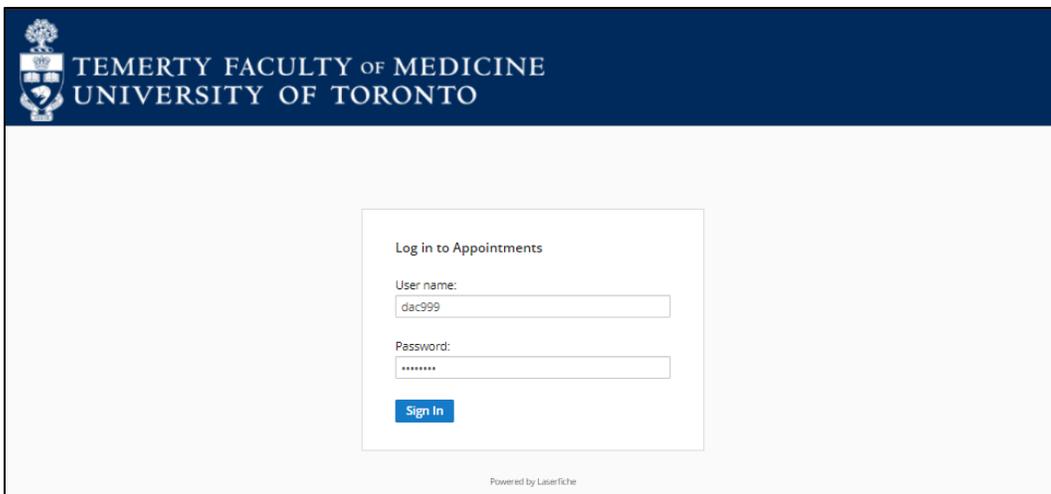
Human Resources staff, the Chair of the FAAC, the Vice Dean of Clinical Affairs and the Dean of the Temerty Faculty of Medicine will be individually informed of their usernames and passwords.

You can access the LaserFiche web client by entering the URL above into a web browser from any computer that has access to the internet. For those of you familiar with our LaserFiche system for Promotions, this is an oft-used website. However, you will **select a different repository (Appointments)** and use a different login name and password. It may be a good idea to save this URL in your browser's favorites to save you from entering it in every time you'd like to access the Academic Appointments system.



5. **Read-Only Portal:** (<http://documents.med.utoronto.ca/appointments>).

The Departmental Appointments Committee (DAC) will log in to the read-only portal using the username = **dacxxx** where the **xxx** is your department's Org unit. For example: dac999. The password, initially, is *password*.



<http://documents.med.utoronto.ca/appointments>

The Appointments Process

Step-by-Step:

a. The *Guide to Academic Appointments* is open to the public; any qualified individual with an interest in an academic appointment can work through the Guide to find the appointment category appropriate for them and the documents required in an application package.

The screenshot displays the website for the Temerty Faculty of Medicine at the University of Toronto. The page title is "Step-by-Step Guide to Applying for an Academic Appointment". The main content area contains introductory text and a quiz question: "Will this be an academic appointment?" with "Yes" and "No" buttons. A sidebar on the right offers links to "Policies Governing Faculty Appointments" and "Go Directly To..." with various appointment categories.

b. If the appointment candidate or their agent is using the Guide, they may access the correct online application forms by clicking on links under “Go Directly To...” in the right-hand side bar of the page. Alternately they may access the desired form by selecting the Links and Templates link on the menu bar. The applicant (or their agent) will fill in the form, attach any documents that they currently have ready, and click Submit.

The screenshot shows the top portion of an application form. The header is dark blue with the University of Toronto logo and the text 'Application Form Clinical Appointments & MD Promotions from Lecturer to Assistant Professor'. Below the header, the form fields are as follows:

- Department ***: A dropdown menu with the instruction 'Select a Temerty Faculty of Medicine department to which you would like to apply.'
- Department Division**: A dropdown menu with the instruction 'If applicable, select a division within the department'.
- Previous Academic Appointment ***: Radio buttons for 'Yes' and 'No' with the instruction 'Do you hold, or have you ever held, an academic appointment at the University of Toronto?'.
- Appointment Type Requested ***: A dropdown menu with 'New primary appointment' selected. Instructions include 'What type of appointment are you applying for now?' and 'If you are unsure, you may review the Guide to Academic Appointments.' Below the dropdown, it says 'Appointment Category will be added later by Department'.
- Last Name ***: A text input field with the instruction '(Family Name or Surname)'.
- First Name ***: A text input field with the instruction 'Given Name (please do **not** include nicknames, aliases or initials)'.

c. The Departmental Coordinator (DC) then receives an email (sender = HRappts.medicine@utoronto.ca) informing them of the submitted application form. The DC logs in to the WebForms Manager (<http://documents.med.utoronto.ca/forms>) and reviews the form. The DC can edit the text boxes the candidate filled in, if they wish. The DC is required to fill in additional information at the bottom of the form in boxes that were invisible to the candidate when filling out the form. The form can be rejected, put on hold if a question requires further investigation, or it can be accepted.

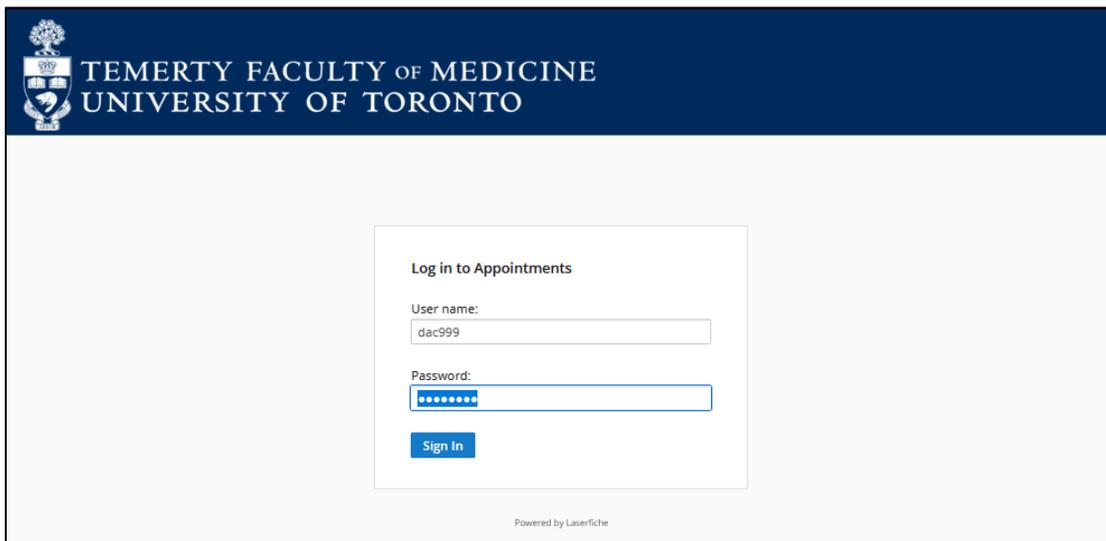
d. When a form is accepted several things happen automatically.

- i. The web form sends LaserFiche the data from the form. LaserFiche takes the data and uses it to fill in two features:

It creates a dossier for the candidate in the department's Appointments repository and fills out an information template with the data. That template is called the Candidate Information template and it can be accessed by checking the box to the left of the dossier and selecting Fields in the right column.

- a) LaserFiche takes the data and fills in a pdf template of the application form and inserts this new pdf document into the newly created dossier.
- ii. LaserFiche creates a unique ID for the dossier.
- iii. Any documents that were attached to the application form are then automatically inserted into the dossier.

- iv. LaserFiche creates a new template called Appointment Status. This template will allow various users to trigger events by changing the status of a dossier and it will show a record of all of the status changes that have taken place for a given dossier.
 - v. If this is a clinical academic appointment where the applicant holds, or will hold, a hospital appointment at one of U of T's fully-affiliated or community-affiliated sites, the Hospital Coordinator (HC) named in the application form receives an e-mail directing them to review the dossier on the Read-Only Portal. The e-mail contains the appointment candidate's **unique ID** mentioned above, and the website for the Document Submission Form should any additional documentation be required.
- e. If this is an application for a clinical appointment, the Hospital Coordinator (HC) gathers any further documents that may be required. (These may include a letter from the Physician-in-Chief and possibly a letter of reference.) The Hospital Coordinator may consult the *Guide to Academic Appointments* <http://aca.med.utoronto.ca> if they are unsure of what documents are needed to complete the dossier. When ready, the HC submits any additional required documents by filling out the Document Submission Form <http://documents.med.utoronto.ca/appointmentdocs> and attaching the documents to it.
- f. LaserFiche inserts the documents into the candidate's dossier and e-mails the DC to let them know that additional documents were submitted.
- g. The DC reviews the dossier. If it is customary in the department, the DC advises the DAC Committee that there are applications pending.
- h. Members of the DAC can log on to the read only portal and view the dossier. The DAC informs the DC of their decision about the appointment.

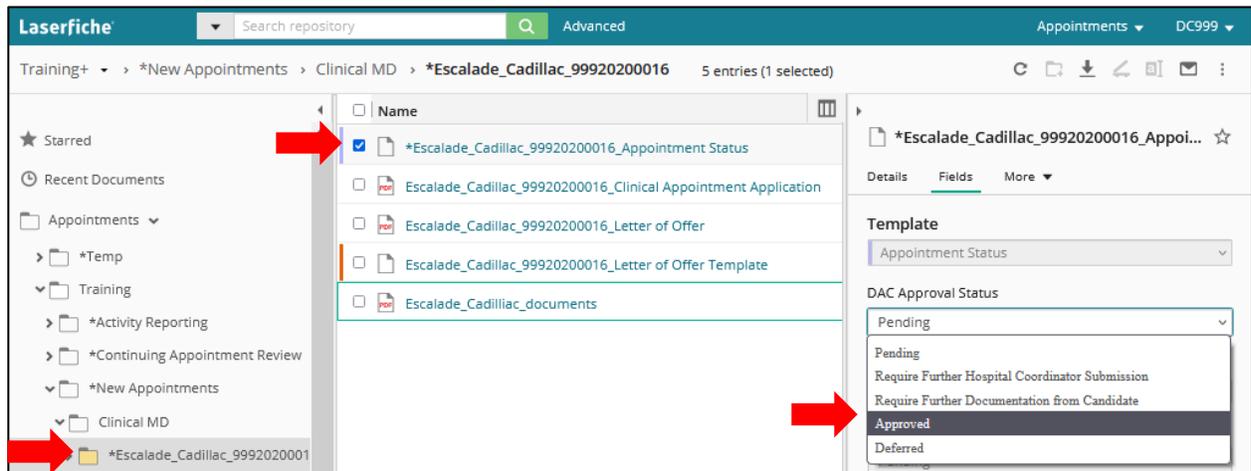


The screenshot shows a login interface for the Temerty Faculty of Medicine at the University of Toronto. The header features the university's crest and the text "TEMERTY FACULTY OF MEDICINE UNIVERSITY OF TORONTO". The main content area is titled "Log in to Appointments" and contains a form with the following fields:

- User name: A text input field containing "dac999".
- Password: A password input field with masked characters (dots).
- Sign In: A blue button.

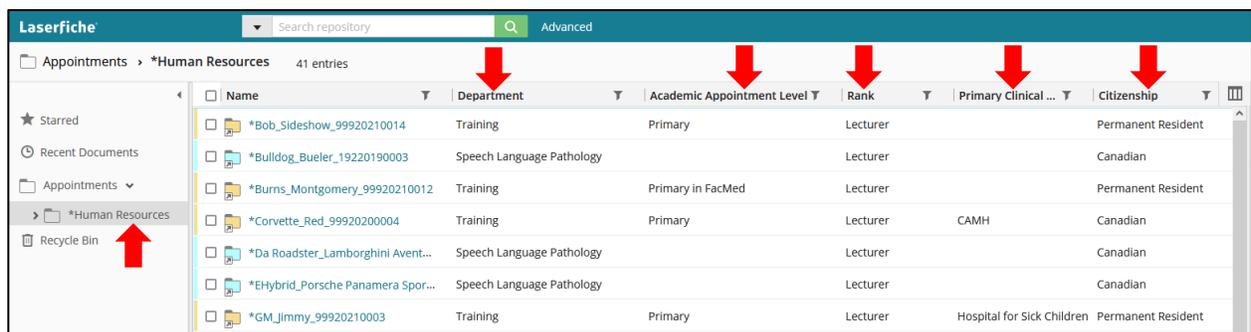
At the bottom of the form area, it says "Powered by Laserfiche".

- i. The DC uploads the Letter from the Department Chair, and a job description, if one is required. See page 21 for instructions on how to upload documents directly into LaserFiche.
- j. At this point, before changing the dossier status to 'DAC Approved' the DC can choose to have LaserFiche generate a Letter of Offer. Alternately, they may upload one to the dossier themselves. Please see the section on generating Letters of Offer on page 26.
- k. The DC changes the status of the dossier to Approved (see the Changing the Status of a Dossier section below).



This removes the visibility of the dossier from the DAC. It also gives access to the dossier to the Human Resources staff (HR) and sends an e-mail to HR to inform them that your DAC has approved the applicant.

- l. Human Resources reviews the dossier.



If the dossier is not complete, HR may select the status 'Incomplete: Return to Dept Coordinator' in the Appointment Status template. Before clicking SAVE they can add a comment about what changes are necessary to the template. Clicking Save, e-mails the DC, who may then make the changes requested by HR.

Template

Appointment Status ▼

DAC Approval Status

Approved ▼

Department Comment

➤

HR Approval Status

Incomplete: Return to Dept Coord ▼

HR Comment

The appointment start date should be changed to xx/xx/xxxx ➤

m. If the DC receives an e-mail like this, they will make the necessary changes and/or upload any further required documentation (see the sections below on 'Editing the PDF Appointment Application Document' and on 'Uploading Documents Directly into LaserFiche').

From: FacultyOfMedicine@utoronto.ca
 To: Katherine McConnell
 Cc:
 Subject: Incomplete Appointment Submission - Returned by HR ➤

Dear Department Coordinator,

The dossier for appointment candidate Travis Park, ID 99920120011 has been returned by HR for the following reason:

The appointment start date should be changed to xx/xx/xxxx ➤

Please send HR notification that you've uploaded the required documents via email, d.deak@utoronto.ca

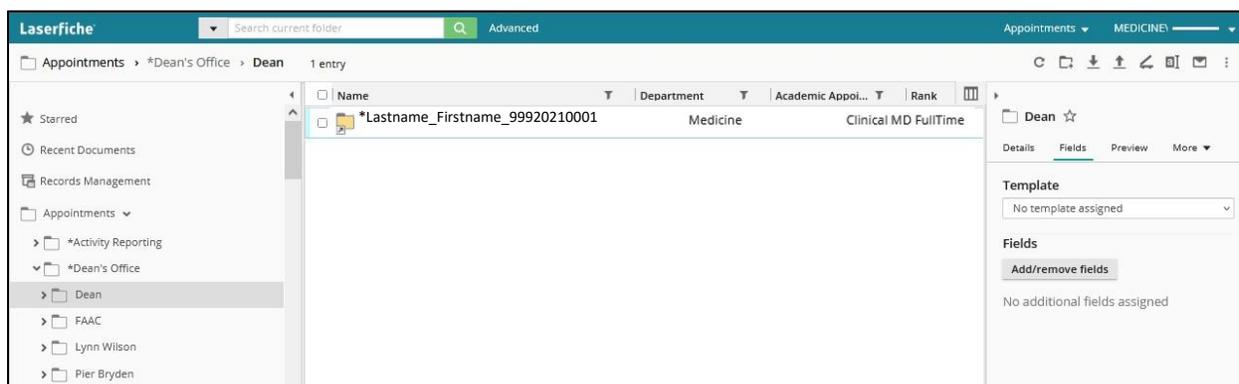
Thank you.

When ready, they will once again change the DAC Approval Status on the Appointment Status template back to DAC Approved.

n. When HR is satisfied with the dossier, using the same Appointment Status template, they grant access to the dossier to either the Vice Dean, the FAAC, or the Dean.

The screenshot shows a dropdown menu for 'Appointment Status'. The selected option is 'Appointment Status'. Below it, there are other dropdowns for 'DAC Approval Status' (set to 'Approved') and 'HR Approval Status' (set to 'Incomplete: Return to Dept Coord'). A text field for 'Department Comment' is also visible. The 'HR Approval Status' dropdown is open, showing a list of options: 'Pending', 'Incomplete: Return to Dept Coord', 'Send to Dean', 'Send to FAAC' (highlighted), 'Send to Lynn Wilson', 'Send to Pier Bryden', and 'HR Approved'.

o. The Vice Dean, the FAAC, and the Dean ARE NOT notified that this access has now been granted. This is to limit the amount of e-mail they get. They do have full access to the LaserFiche system and, unlike the DAC and the Hospital Coordinators (HC), will log in to LaserFiche (<http://documents.med.utoronto.ca/laserfiche>). When they log in they will see only the applicant dossiers that have been approved for their review.



p. To approve or defer an appointment candidate, the Vice Dean, the FAAC Chair or the Dean will open the Appointment Status document (purple icon), and make a selection from the dropdown list under the Dean/Vice Dean/FAAC Approval Status.

Template

Appointment Status ▼

DAC Approval Status

Approved ▼

Department Comment

➤

HR Approval Status

Send to FAAC ▼

HR Comment

The appointment start date should be changed to xx/xx/xxxx ➤

Dean / Vice Dean / FAAC Approval Status

Pending ▼

- Pending
- Return to Human Resources
- FAAC Preliminary Approval
- Approved by Dean
- Deferred

q. When the value 'Approved by Dean' is selected, the Department Coordinator (DC) is alerted via e-mail that the appointment for this candidate has been approved.

Note: The use of LaserFiche to manage the appointment does not end here even if the department prefers to handle the issues of notifying the candidate and extending Letters of Offer, in their own unique fashion. If the department decides to do this, please read paragraph **(u)** of this workflow summary to learn about updating the candidate's metadata template with a Personnel Number when one is assigned. **Adding a Personnel Number to LaserFiche is mandatory and should happen only after a signed letter of offer is received.**

r. If the department wishes, LaserFiche can send an e-mail, with an attached Letter of Offer and Job Description (if desired), to the candidate, congratulating them on the appointment. In order for this to happen, there must be in the dossier a letter of offer that has the file name (in the format below).

Surname_FirstName_ApplicationID_Letter of Offer.

This file may have been created by the Letter of Offer Template (see paragraph above and the section below titled Letters of Offer) or it may have been uploaded by the DC. Regardless, to be recognized by LaserFiche it must have the file name in the format detailed above.

Similarly, if other files are indicated in the Enclosures field on the Letter of Offer template as being attached to the e-mail, the file must be included in the dossier and the file name must begin with the word Enclosure (e.g.: Enclosure_JobDescription.pdf).

s. To send an e-mail with attached Letter of Offer and, if necessary, other Enclosures, the Department Coordinator will once again open the Appointment Status template (purple icon). Scrolling down to the bottom of the template shows a previously invisible field titled “Email Letter of Offer to Candidate” select Email Letter of Offer.



The image shows a screenshot of a software interface. At the top, there is a section titled "Fields". Below this title is a button labeled "Add/remove fields". Underneath the button, the text "Email Letter of Offer to Candidate" is displayed. A dropdown menu is open below this text, showing four options: "Pending", "Email Letter of Offer" (which is highlighted with a dark background), "Sent Letter of Offer Outside of Laserfiche", and "Status - Letter Dispatched".

Note that the e-mail will be sent to the e-mail address shown in the Candidate Email field in the Candidate Information template, in the Fields tab. The email will also be copied to any email addresses supplied on the Letter of Offer template.

Back on the Appointment Status template, make the Letter of Offer selection you prefer (assuming the necessary files exist in the dossier with the required filenames) and click SAVE. Scroll back up the template and click SAVE to send the e-mail. You, as the Department Coordinator, will receive a copy of the Letter of Offer e-mail that is sent to the Candidate.

t. The Letter of Offer e-mail gives the appointment candidate the e-mail address of the Department Coordinator (DC). It is up to the appointment candidate to sign the Letter and get it back to the department. There is no LaserFiche function for this.

u. Upon receiving the signed Letter of Offer, you may upload it directly into the candidate's dossier.

v. After you have received the candidate's signed Letter of Offer it is the department's responsibility to add the new appointee to the HRIS database. When a Personnel Number is available **it is required** that you add the Personnel Number to the Candidate Information template in LaserFiche. You do this by clicking on the candidate's dossier. This will open the dossier and the Candidate Information Template Fields column will display to the right. Enter the Personnel Number into that field.

Adding the Personnel Number completes the application process and moves the dossier out of the *New Appointments area and into the Permanent Record area. Once here, it is available for participation in any future activity report processes.

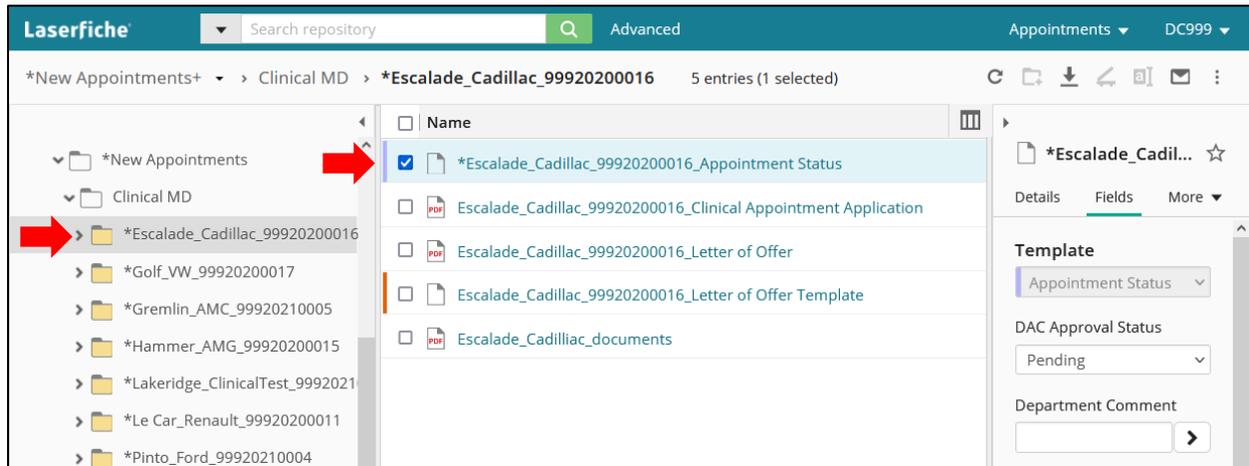
New for 2021:

When a personnel number is entered into that field for a new appointment, Laserfiche will automatically search all departments in the Temerty Faculty of Medicine for any existing appointments in all departments and update their Rank fields with the most recent approved Rank.

****This Completes the Step-by-Step Outline of the Workflow****

Changing the Status of a Dossier

The status of a dossier is controlled and recorded on the candidate's 'Appointment Status' sheet. This is the file with the purple icon in the dossier. It is created when the dossier is created. Double click on this file to open it.



The status of a dossier defines for whom the contents of the dossier are visible. (i.e. Human Resources cannot see appointment dossiers from the departments until the DAC Approval Status is set to approved. Likewise, the FAAC, the Vice Dean or the Dean cannot see the dossiers until the HR Approval Status is set to 'Send to ... (someone in the Dean's Office)').

Permission to change a dossier status is limited to the user controlling that portion of the workflow (see Appendix A).

The Appointment Status History records events as they occur in the workflow. In the illustrations below we can see the date the application form was submitted. As the workflow progresses, further events will be recorded.

*Escalade_Cadillac_99920200016_Appointment Status ☆

Details Fields Preview Processes Records More ▾

Template

Appointment Status ▾

DAC Approval Status

Pending ▾

Department Comment

HR Approval Status

Pending ▾

HR Comment

Dean / Vice Dean / FAAC Approval Status

Pending ▾

Dean / Vice Dean / FAAC Comments

Appointment Status History

Application submitted to dossier 8/4/2020 10:31:31 AM

Department Approval Status: "Require Further Documentation from Candidate" by DC999 on 8/4/2020 10:40:25 AM

Change the status of a dossier

Check the box to the left of the Appointment Status template in the dossier (the one with the purple icon). The fields will be displayed to the right.

You will only be able to change the status of a workflow in areas where you have control. Change the status from the drop down box and click [Save].

Refresh the screen and you will see that the status change event was recorded in the box at the lower end of the template called Appointment Status History.

Uploading Documents Directly into LaserFiche

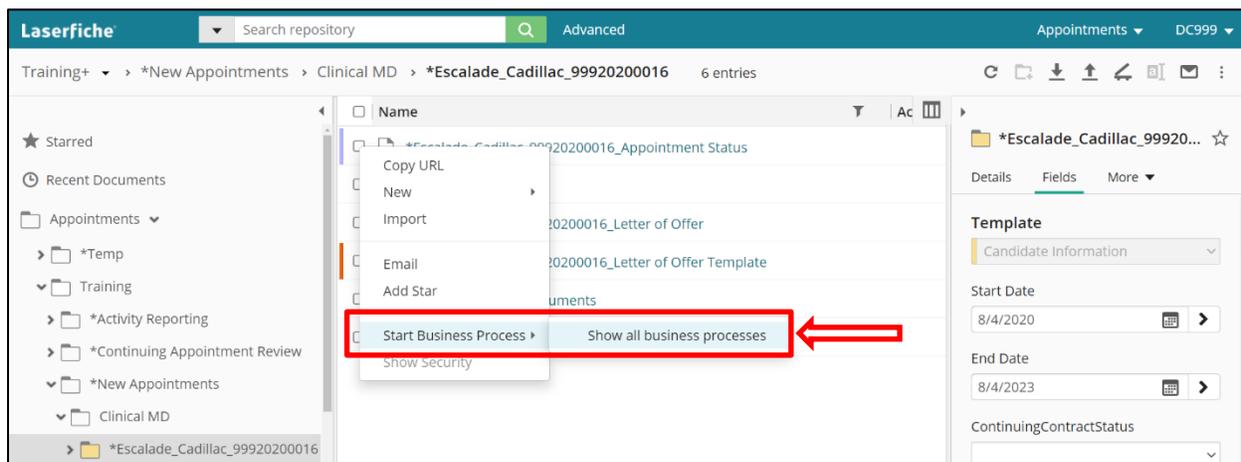
Uploading documents directly into the dossier is simple. Make sure you have highlighted the folder into which you want to upload the documents. Click the Import arrow (pointing up) on the top right below the green band >> Select the document>> Click Start Import >> Click Next on the Message Box that appears (ignore any information inside the box) >> Refresh the screen by clicking the circle button with arrow on the top right.



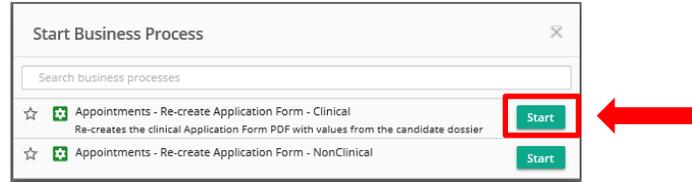
Regenerating the Appointments PDF

The Appointment Application Form PDF is a system generated file triggered initially when a Candidate application is accepted for consideration by the DC. If changes are required the document can be regenerated inside Laserfiche.

- i. Click on the Candidate dossier to display the Candidate Information template.
- ii. The fields in the far right column will be displayed. Make any changes you need here first and click Save.
- iii. In the middle window, right click on either the Appointment Application PDF (or the Appointment Status file), select Start Business Process, then Show all business processes.



- iv. Beside “Appointments – Re-create Application Form – Clinical” Click Start.



The Application PDF will be regenerated with your edits. It will replace the original document. To view the revised PDF, click on the refresh button on the upper right (the Creation date will change), then click on the PDF.

Column Headings – Refining your View, Sorting your Lists

When viewing a list of pending or accepted appointees you may want to see some information about them displayed in the columns. The information people want displayed is quite variable, and can be individual to each department, hospital, or user. Not every piece of metadata is available, or desirable, as a column heading, but there are some that may be helpful. Other metadata may be used as a column header by default but may not be very useful.

The most useful metadata, we think, that can be used in columns comes from the Candidate Information template. This is the template that holds the data from the application form.

A. To change what column headings are displayed (for Department Coordinators, Human Resources Coordinators, the Vice Dean, the FAAC or the Dean):

Right click on any existing column header bar >> Select Column Picker >> In the left column (Available) >> Drag the Field Name to the right column (Selected). To remove fields from display, drag the Field Name from the right column to the left column. Repeat these steps for each field you wish to add/remove.

Configure Column Display

Available Selected Remove All Reset

Search

Common Columns

- Checked out by
- Classification level
- Created by
- Electronic file last modified
- Entry ID
- Extension
- Has tags
- Indexed
- Last modified
- Last modified by
- Latest version
- Location description

Name

- Creation date
- Academic Appointment Category
- Rank
- Dean Office Status
- HR Status
- Department Status

Save Profile Apply Cancel

Click Save Profile when done. Then select Save as a new column profile (type a name into the blank field and click Save); or select Replace an existing column profile (if one was previously saved), then click on the dropdown list, select and click Save.

Save Column Profile

Save as a new column profile

Replace an existing column profile

Activity Reporting - End Dates and Emails

Save Cancel

B. **To change what columns are displayed on the Public Portal** (for Hospital Coordinators and DAC members): <http://documents.med.utoronto.ca/appointments>

After logging in, click on My Weblink in the top-right area of the screen.

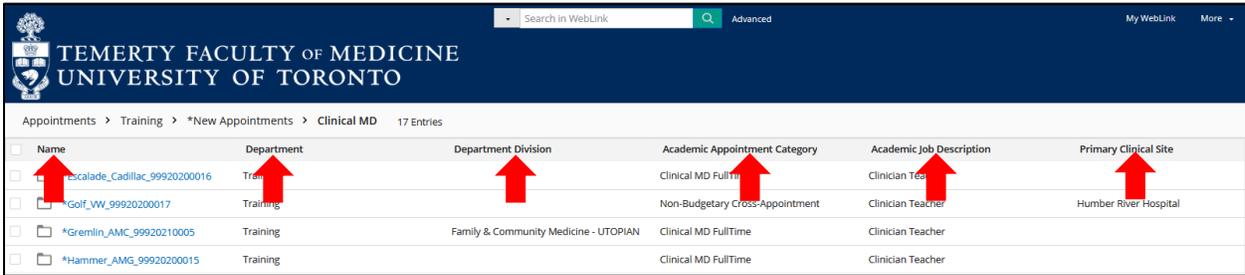
- i. In the leftmost box, make sure Browse Options is highlighted.
- ii. In the middle box, under Choose Displayed Fields, select Templates from the dropdown list.
- iii. Scroll down to Candidate Information, then directly under Candidate Information, one by one, check the fields you would like to see as columns.
- iv. Click the sideways arrow (pointing right) to add it to the rightmost box. Columns selected will be saved automatically.

The screenshot shows the 'Browse Options' interface. On the left, under 'My Weblink', 'Browse Options' is highlighted with a red box and arrow labeled 'i.'. In the center, under 'Browse Options', the 'Choose displayed fields:' dropdown is set to 'Templates', highlighted with a red box and arrow labeled 'ii.'. Below this, the 'Candidate Information' section is expanded, and several fields are checked, highlighted with a red box and arrow labeled 'iii.'. A right-pointing arrow is clicked to move a field to the 'Fields selected' list, highlighted with a red box and arrow labeled 'iv.'. The 'Fields selected' list on the right contains several fields, each with an unchecked checkbox.

- v. To remove from view any columns headings that are not useful check fields in the rightmost box, check the box to the left of the field name.
- vi. Click the sideways arrow (pointing left). Columns selected will be saved automatically.

The screenshot shows the 'Browse Options' interface. In the 'Fields selected' list on the right, a checkbox next to a field name is checked, highlighted with a red box and arrow labeled 'v.'. A left-pointing arrow is clicked to remove a field from the 'Fields selected' list, highlighted with a red box and arrow labeled 'vi.'. A red arrow points to the 'Browse' link in the top navigation bar.

To view the dossiers, click on the Browse link on the top center then click through the folders (You department >> *New Appointments >> Clinical MD) to arrive at clinical appointments.



Name	Department	Department Division	Academic Appointment Category	Academic Job Description	Primary Clinical Site
*Escalade_Cadillac_99920200016	Training		Clinical MD FullTime	Clinician Teacher	
*Golf_VW_99920200017	Training		Non-Budgetary Cross-Appointment	Clinician Teacher	Humber River Hospital
*Gremlin_AMC_99920210005	Training	Family & Community Medicine - UTOPIAN	Clinical MD FullTime	Clinician Teacher	
*Hammer_AMG_99920200015	Training		Clinical MD FullTime	Clinician Teacher	

And remember that you can sort your list by columns: Simply left-click on the column header to sort the list of appointees alphabetically, by the metadata in that column.

Letters of Offer

Letters of Offer are standardized for most clinical and non-clinical appointments (except Clinical MD FullTime Equivalent and Visiting Clinical Professor). Unless there are exceptional circumstances, departments are required to use LaserFiche to generate clinical offer letters. Departments still have the option to create their own letter and upload it into LaserFiche.

Departments also have the option of having LaserFiche send the Letter of Offer to the applicant attached to an email, or of sending it to the applicant themselves. Unless there are special circumstances, using LaserFiche to send the letter is the preferred method because LaserFiche will record the day it was sent.

Creating letters and sending letters are two different functions in LaserFiche and the choice of which way to go in each case is independent of the other choice.

Letters of Offer generated by LaserFiche are personalized to the applicant with field values from both the Candidate Information template and the Letter of Offer template. The Letter of Offer templates are unique to each appointment category. When the Letter of Offer Status field in the Letter of Offer template says Create Letter of Offer, the template runs a workflow which inserts the personalized data into the appropriate letter template. The completed letter will appear in the Current Folder.

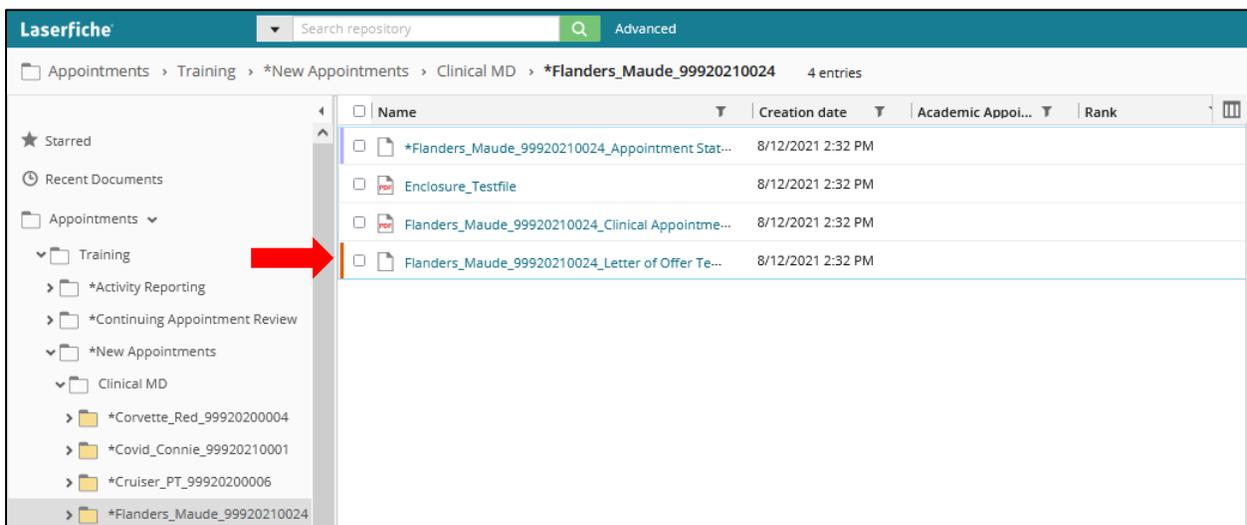
Letters of Offer are reviewed in Human Resources before the appointment is approved so it is necessary to have an initial version of the letter in the dossier before the dossier status is changed to 'DAC Approved'. It will very likely be necessary to make some minor changes in the letter after the application receives approval from the Dean's office and before it is sent to the

candidate. This is a very simple procedure, requiring only that the relevant fields in the templates be updated, the Letter of Offer field be reset to Create Letter of Offer, and the letter of offer template be saved again. This regenerates the letter and overwrites the earlier one.

If Letters of Offer are going to be sent automatically by LaserFiche, the file name for the letter must be in this format: '**Lastname_Firstname_ApplicantID_Letter Of Offer**'.

Generate Letters of Offer (Using LaserFiche Web Access):

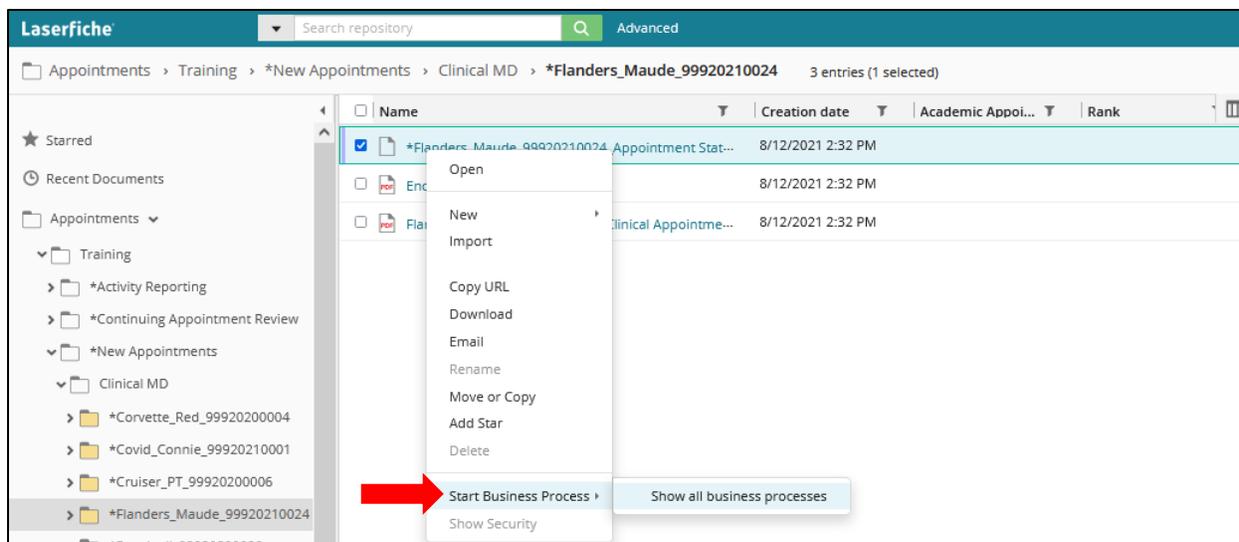
When a clinical applicant dossier (except for Clinical MD FullTime Equivalent and Visiting Clinical Professor) is created in the *New Appointments/Clinical MD area, a Letter of Offer template is automatically inserted into the current folder for the dossier.



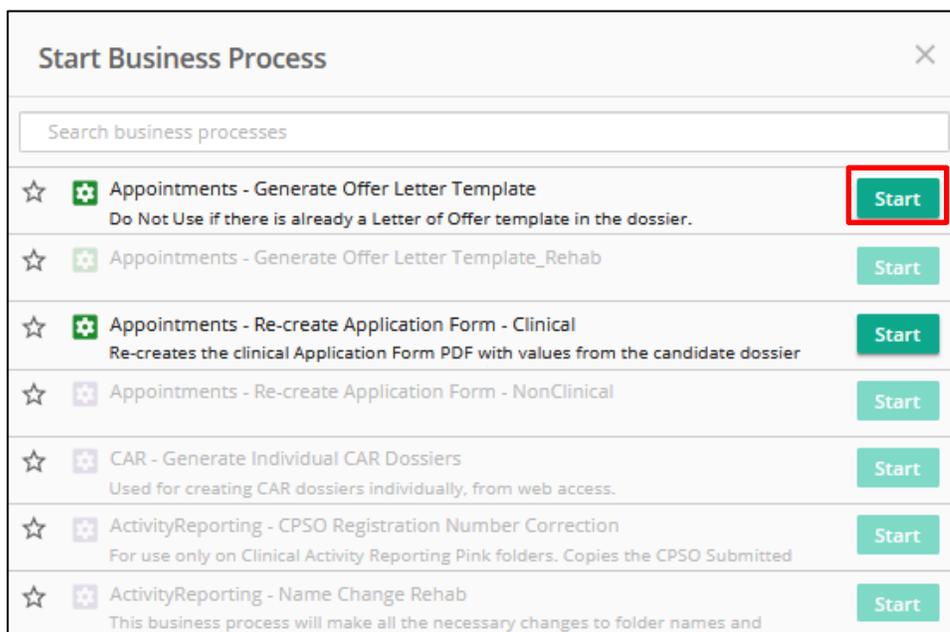
Re-create the Letter of Offer Template

If the Letter of Offer template is not there or if you deleted it, you may recreate the Letter of Offer Template from the Appointment Status template.

Right-click on the Appointment Status template, select Start Business Process from the drop down list, then Show all business processes.

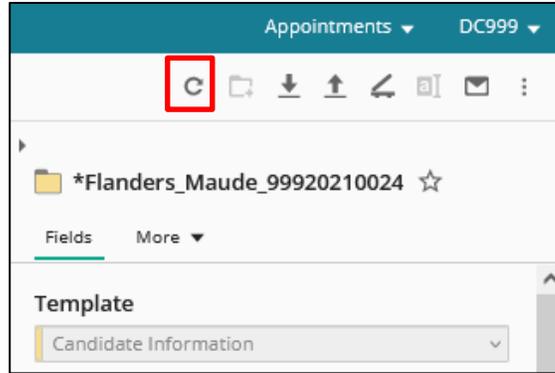


The list of Business Processes will display. To the right of “Appointments – Generate Offer Letter Template”, click the Start button.



The Letter of Offer template will appear as a file with an orange icon and has a file name with the format ‘Lastname_Firstname_ApplicantID_Letter Of Offer Template’.

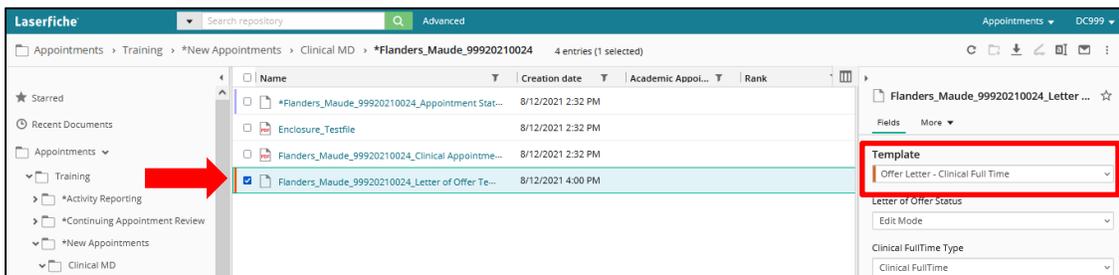
You may need to refresh the screen to see it. (The refresh button is located to the upper right, below the Green band, and looks like an open circle with arrow.)



Note: Sometimes you have to uncheck the box first and Save, and then re-check and Save to reset the value on the server. Then refresh the screen in the Current Folder.

Once you can see the Letter of Offer template.

1. Open the Letter of Offer template in the Current Folder by checking the box to the left of it then confirm that the drop down value below Template is for the correct appointment category.



- If it is not for the correct appointment type, first go back to the Candidate Information template by left-clicking on the dossier (yellow folder in the left sidebar). Change the Academic Appointment Category field to the correct category and Save. Only then, go back to the Letter of Offer template and using the drop down arrow beside the Template name select the correct Letter of Offer template and click Save.
2. Fill in the fields in the Letter of Offer template. The fields vary per Academic Appointment Category.
 - Clinical Full Time Type** is a field only in the Clinical Full Time Template. It allows you to indicate whether this letter will be for a regular full-time applicant, a

foreign-trained full-time applicant, or a clinical full-time equivalent.

- b. **Start and End Dates:** To ensure that appointment dossiers never get saved in LaserFiche without an End Date, an End Date has been automatically calculated from the current system date. This may be changed but all dates must adhere to accepted policy. If you are unsure of the date, select an estimated Start Date. This will likely need to be changed before the final version of the letter of offer is generated.

The same Start and End Date fields can be seen on the Candidate Information template. If you create a letter of offer with the Letter of Offer template, those date values will overwrite the date values in the Candidate Information template. The reverse process is not true.

- c. **Letter of Offer Additional** allows you to add additional information or requirements specific to your department. The text generally appears in the last paragraph of the first page of the letters. It has a maximum character count of 310 characters.

Note: In non-clinical Letters of Offer this field is replaced by:

- **Letter of Offer Candidate Responsibilities** allows you to outline job responsibilities that are specific to this candidate. This field has a maximum character count of 1100 characters and can be a single or multiple paragraphs. (Note: This field is not used for Non-Budgetary Cross-Appointment Offer Letters.)
 - **Letter of Offer Department Specific Additions** allows you to add additional information or requirements specific to your department. This field has a maximum character count of 1100 characters and can be a single or multiple paragraphs. (Note: This field is not used for Non-Budgetary Cross-Appointment Offer Letters.)
- d. **Offer Retraction Date:** This is the date after which the offer of appointment to the applicant becomes invalid. If necessary, update this for the final version of the letter.
- e. **Letter of Offer CC:** Up to 4 names may be added to this field, each on separate lines. They will appear in the CC area of the letter.
- f. **Letter of Offer CC Email Addresses:** If there are names in the **Letter of Offer CC** field above, it is necessary to add the associated email addresses in this field.

This is a multi-value field, meaning that when one email address is typed in the box, a second box will appear to house the next one – do not type the email addresses all into one box as was done in the **Letter of Offer CC** field above.

If there is a **Hospital Administrative Email** address in the Candidate Information template, it is automatically added – there is no need to add it here.

- g. **Letter of Offer Enclosures:** If you plan on sending additional material to the applicant along with the actual letter of offer, the titles of those documents can be mentioned here. Type them on separate lines in the one box.

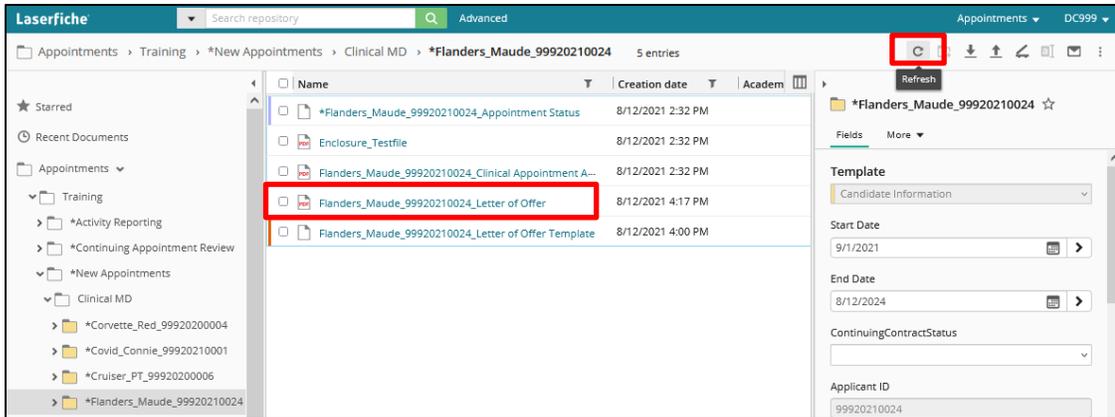
Very Important Note: Typing text into this **Letter of Offer Enclosures** field simply adds the text to the letter of offer in the Enclosures area. It does not control whether those documents actually exist in the dossier nor does it tell LaserFiche to attach them to the Letter of Offer email.

Any documents mentioned in this field need to be uploaded to the dossier before the final version of the letter is sent AND, if LaserFiche is being used to send the Letter of Offer, **the file names of these additional documents need to begin with the word Enclosure.**

examples: Enclosure_DepartmentProfile

EnclosureAcademicPositionDescription

3. Once the fields have been filled in, change the Letter of Offer Status field at the top of the template to Create Letter of Offer and click Save.
4. You will see a new pdf document has appeared in the dossier having a file name format of 'Lastname_Firstname_ApplicantID_Letter of Offer'. Click the refresh button to the upper right if you do not see the file.



5. Double click this pdf file to open it and review the letter.

Make Changes to a Letter of Offer:

If you need to make changes to the editable field values in a Letter of Offer (i.e. you want to change the appointment start date or change the mailing address) you need to change the field values in the templates in which the data is housed. The letter of offer workflow pulls field values from either the Candidate Information template or the Letter of Offer template. Look there to make your desired changes.

Once the changes have been made, and if it is not already opened, click on the Letter of Offer template and in the right pane click "Fields". Change the Letter of Offer status back to Create Letter of Offer and click Save, then refresh the screen. The revised Letter of Offer will have immediately overwritten the previous one.

Department Address and Chair's Name and Email:

The department address that appears in the footer of the first page of each letter of offer and the Department Chair's name and email address, which are added to the salutation of the letter, are now stored in a database located on the LaserFiche server. Department Coordinator's do not have access to this database.

If this information needs to be edited, please send an email request to discovery.commons@utoronto.ca.

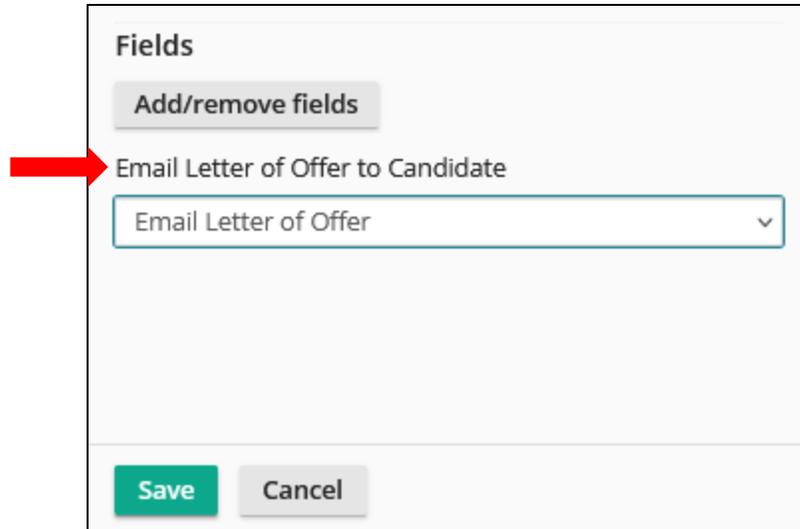
E-Mail Letters of Offer:

To send an e-mail with an attached Letter of Offer and, if desired, some additional attachments (enclosures) follow these steps below:

1. Make sure that a Letter of Offer is in the dossier and that it is named in the format **Lastname_Firstname_ApplicantID_Letter of Offer**
2. Make sure that any Enclosures you wish to send with the Letter of Offer and/or are mentioned in the Letter of Offer Enclosures field, exist within the dossier **AND** that their file names begin with the word Enclosure.
examples: Enclosure_DepartmentProfile, EnclosureAcademicPositionDescription, etc.

Important Notes on Enclosures:

- a. The letter of offer itself does not need to have the word Enclosure at the beginning of the file name.
 - b. Any file beginning with the word Enclosure will be picked up and attached to the Letter of Offer email regardless of whether or not it is mentioned in the Enclosures field in the Letter of Offer template.
3. Make sure that the e-mail address for the candidate is correct in the Candidate Email Address field in the Candidate Information template. You can view and edit this in the Candidate Information template by clicking the candidate's dossier (yellow folder) in the left column. In the right column, click on the Fields tab to display the Candidate Information template. Then scroll down to see the Candidate Email Address field.
 4. Once again, open the Appointment Status template (purple icon) by checking the box to the left to display the Template fields. Scrolling down to the bottom of the template shows a previously invisible field titled "Email Letter of Offer to Candidate. This field only becomes visible when the application receives final approval.



The screenshot shows a 'Fields' dialog box. At the top, there is a title 'Fields' and a button 'Add/remove fields'. Below this is a list of fields, with 'Email Letter of Offer to Candidate' selected. A red arrow points to this field. Below the list is a dropdown menu showing 'Email Letter of Offer'. At the bottom are 'Save' and 'Cancel' buttons.

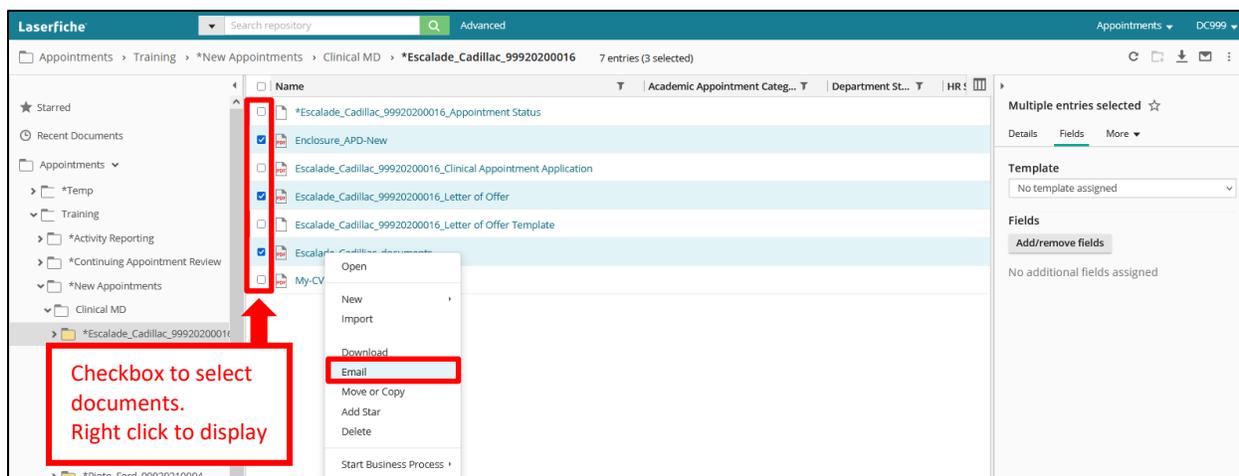
5. Select Email Letter of Offer, then click Save. An email will be sent to the candidate with the letter of offer and any files beginning with the word Enclosure attached. The email will be automatically copied to the department coordinator, to any email addresses in the **Letter of Offer CC Email Addresses field**, and, if there is an email address in the Hospital Administrative Email field in the Candidate Information template, to the hospital coordinator. The Email Letter of Offer to Candidate field will then change to "Status – Letter Dispatched" to indicate it was sent and a note will be written to the Appointment Status History field recording the date, time and the account used to trigger the action.
6. The Offer Letter can be re-sent to the candidate by selecting "Email Letter of Offer" and clicking Save. A new note will be added to the "Appointment Status History" field, and the "Email Letter of Offer to Candidate" field will revert to "Status - Letter Dispatched". If the Offer Letter is re-sent outside of Laserfiche, then change the Email Letter of Offer to Candidate field to "Sent Outside of Laserfiche". This will create a new note in the "Appointment Status History" field. The Email Letter of Offer to Candidate field will then change to "Status – Letter Dispatched".

E-Mailing Other Documents Directly From LaserFiche

In the preceding section, we talked about how the Appointments approval workflow is set up to send automated notification e-mails to the Vice Dean, the Dean, the FAAC, and/or back to the Department Coordinator. The Provost, however, is not included in this list of automated e-mails.

It is easy to send copies of documents directly from LaserFiche to anyone using your Outlook e-mail application.

- I. Open the Original Application folder for the candidate so that you can see the list of the documents. (steps 1 – 4 of the last section)
- II. Select the documents by checking the box to the left of the file names. You may select more than one. The ‘templates’ will not attach to your e-mail even if they are selected.
- III. Hover your mouse pointer over the selected documents, right click, and select ‘Email’.



- IV. The box below will appear with your selected documents listed. Check the box beside “Use email client to manually send the message”, then click Send.

Email Basket

Name	Send as Pages	Pages	Page Range	Clear All
Enclosure_APD-New	<input type="checkbox"/>	1	1	
Escalade_Cadillac_999202000...	<input type="checkbox"/>	0		
Escalade_Cadillac_documents	<input type="checkbox"/>	0		

These documents have been selected to be sent via email. Enter page numbers and/or page ranges separated by commas. Example, 1,3,5-12.

Send as: Files

Email: Use email client to manually send the message

To:

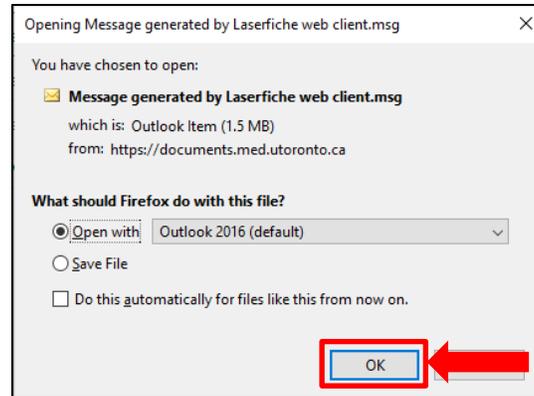
Subject:

Message: % (UserName) thought you would be interested in these Laserfiche documents.
Sent by the Laserfiche web client.

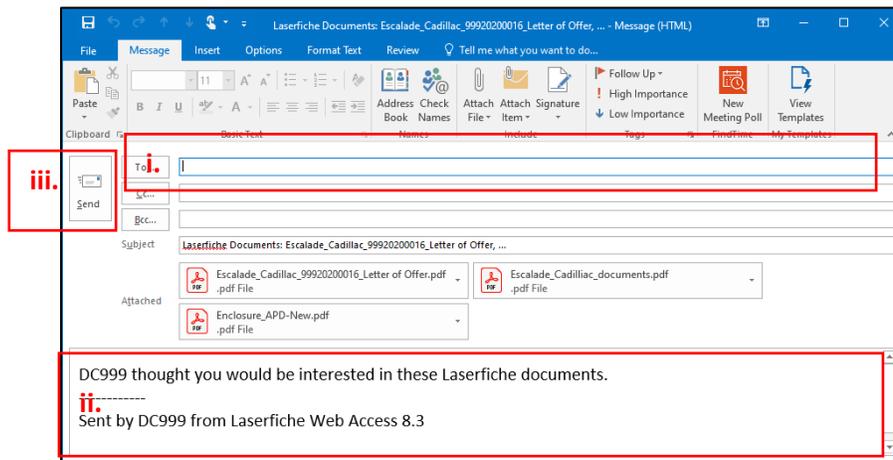
Password: Set a password

Email options: Send Close

If a Security Warning displays, click Continue. Then click OK to send the email through Microsoft Outlook.



- V. Your Outlook Email application will open and it can be sent like a regular email with attachments. i. Enter recipient name in the To (and CC, if desired) field; ii. Customize the body of the message; iii. Then click Send.



Appendix A - Quick Reference to Appointments System Websites

Guide to Academic Appointments
http://aca.med.utoronto.ca

Online Applications / Document Submission
http://documents.med.utoronto.ca/Forms/nonclinical http://documents.med.utoronto.ca/Forms/clinical http://documents.med.utoronto.ca/Forms/appointmentdocs

Web Forms Manager
http://documents.med.utoronto.ca/Forms

LaserFiche Appointments System
http://documents.med.utoronto.ca/LaserFiche

Read-Only Portal
http://documents.med.utoronto.ca/appointments

