

Workflow Directions - Sabbatical Request

Faculty Member Submitting a Sabbatical Request

Once the Sabbatical Request cycle is kicked off in Faculty Success an email will be sent to you with a link to the workflow. Also, when you log into Faculty Success you will now have a Workflow tab. Under the Workflow tab there will be an option for **Tasks**. There are two areas under **Tasks** – Inbox and History. The current workflow that needs action will be under Inbox. Click on the name of the active workflow.

Fill out the form in Faculty Success by answering the questions in the text box(es) and attach your supporting documents. The workflow can be saved by selecting **Actions** → **Save as Draft** at any point and you can return at another time to continue working on it. The form will stay in the Inbox with the Step equal to Faculty and Subject equal to Me. Once you are done filing out the form select **Actions** → **Submit to Department Faculty** for the form to move to the next step.

Your submitted form will move to History on the Workflow Task section. The Current Task will change according to which step it is in the process. It will move from Department Faculty to Dean to Provost and back to you at the end of the process. Under the **Actions** drop down you have the ability to **Recall** your submission if you want to stop the process but only until it has been completed by the next step.

Note: There is a link to the Vita Report in Faculty Success which includes all of the information that was entered in the system. Click on the Vita link to open the report and review it for accuracy. If edits are needed go back into Faculty Success and make any needed changes. After you have made changes, return to the workflow and select **Refresh Report** to update the report attached to the workflow. If your data is not fully entered into Digital Measure yet you can attach your Vita to the request form.

Sample of the form that you will fill out in Faculty Success:

< Faculty Form

• Semester(s) of Proposed Sabbatical Leave

Define "Other" Semester - Proposed Sabbatical Leave

• Home Address

Date of Last Sabbatical

Date of Report - Last Sabbatical

• Applied for outside funding?

• Would your project be significantly impaired if it is postponed? If yes, explain in separate document.

• Beginning date of Employment at SHU:

• Date Tenured:

Attachments

[Drop files here or click to upload](#)

- CV - Required-must include full employment history and complete scholarship record. Yes No
- Formal statement of the project for which you seek a sabbatical (Required-not to exceed 1 page). Yes No
- Work schedule indicating anticipated progress during the sabbatical period (Required). Yes No
- Formal statement of how the project will contribute to your professional development, to your department, and to the University (Required-not to exceed 1 page) Yes No
- Formal statement of eligibility, including list of semesters of full-time faculty service counted toward sabbatical eligibility. (Required-not to exceed 1 page) Yes No
- List of outside funding applications (If applicable). Yes No
- Most recent sabbatical report (If applicable). Yes No
- Reason project would be significantly impaired if postponed (If applicable-not to exceed 1 page). Yes No

Submission of your application indicates that you are familiar with all obligations a faculty member has regarding a sabbatical, as described in the *Faculty Guide* and in the appropriate Academic Memorandum; and specifically that you are willing to serve for at least one year after the expiration of the term of your sabbatical leave unless this provision of the University Sabbatical Policy has been waived, in writing, by the Provost.

• Enter your name as your signature.

After the Provost step the process will move back to you. You will see the Provost's decision, comments and a decision letter (if approved or denied). There are three options after the initial Provost review. It is important that you reply in the following way:

- **Application Accepted** – Enter into the Comments field that you accept the sabbatical and add any other related statements and select **Actions** → **Accept & Complete**
- **Application Under Review** - Enter into the Comments field additional information requested by the Provost's office and attach supporting documents if needed and select **Actions** → **Submit to Provost 2nd Review**
- **Application Denied** - Enter into the Comments field that you have read the letter and add any other related statements and select **Actions** → **Accept & Complete**

If your application was under review it will be returned to you after that review is completed and appears as the Faculty 2nd Review.

- **Application Accepted** – Enter into the Comments field that you accept the sabbatical and add any other related statements and select **Actions** → **Process Complete**
- **Application Denied** - Enter into the Comments field that you have read the letter and add any other related statements and select **Actions** → **Process Complete**

Department Faculty Review and Vote

Once the Sabbatical Request has been submitted by the faculty member you will receive an email with a link to the workflow. Also, when you log into Faculty Success you will now have a Workflow tab. Under the Workflow tab there will be an option for **Tasks**. There are two areas under **Tasks** – Inbox and History. The current workflow that needs action will be under Inbox. Click on the name of the active workflow.

As a member of the department review committee you will have access to the faculty members submitted form and documents. Once you review the application and materials select **Actions** → **Mark as Reviewed for Chair** to notify the department chair that your review is complete. Departments handle the voting differently and the votes will be made outside of Faculty Success.

The workflow will remain in the Inbox until the Department Chair completes the process and then it will move to the History section on the Workflow Task page. The Current Task will change according to which step it is in the process. It will move from Department Faculty to Dean to Provost and back to the faculty member at the end of the process. After all steps in the workflow are completed this task will be removed from your workflow History section.

Department Chair Approval

Once the committee has completed the review and the vote has been taken you will log in the committee vote and indicate if the request is approved or not approved. There is a field to enter a supporting statement. If needed, you have the ability to send back (**Actions** → **Send Back**) the application to the previous step. Once you are done filing out the form select **Action** → **Submit to Dean** for the form to move to the next step.

The workflow will move from the Inbox to History on the Workflow Task section. The Current Task will change according to which step it is in the process. It will move from Department Faculty to Dean to Provost and back to the faculty member at the end of the process.

Sample of the form that the Department Chair will fill out in Faculty Success

< Department Faculty Form

Enter the total vote from the department faculty in the Department Vote field.

Example: ___ Approved and ___ Not Approved

• Department Vote:

• Department Chair Approval:

Supporting Statement

Dean Approval

Once the Sabbatical Request has moved from the Department Faculty step you will receive an email with a link to the workflow. Also, when you log into Faculty Success you will now have a Workflow tab. Under the Workflow tab there will be an option for **Tasks**. There are two areas under **Tasks** – Inbox and History. The current workflow that needs action will be under Inbox. Click on the name of the active workflow.

As Dean you will have access to the faculty members submitted form and documents as well as the Department Faculty vote and the Department Chairs comments. Once you review the application and materials fill out the form and select **Action → Submit to Provost** for the form to move to the next step.

The workflow will move from the Inbox to History on the Workflow Task section. The Current Task will change according to which step it is in the process. It will move from Dean to Provost and back to the faculty member at the end of the process.

Sample of the form that the Dean will fill out in Faculty Success

< Dean Form

• Deans Approval

Supporting Statement

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Provost Approval

Once the Sabbatical Request has moved from the Dean's step you will receive an email with a link to workflow. Also, when you log into Faculty Success you will now have a Workflow tab. Under the Workflow tab there will be an option for **Tasks**. There are two areas under **Tasks** – Inbox and History. The current workflow that needs action will be under Inbox. Click on the name of the active workflow.

As Provost you will have access to the faculty members submitted form and documents as well as the Department Faculty vote, the Department Chairs comments and the Dean's comments. Once you review the application and materials select your response, fill out the form and attach your letter to the faculty member then select **Actions → Submit to Faculty Response**.

There are three options in the Provost's review step. The action that is taken by the faculty member for each response is:

- **Application Accepted** – The faculty member will enter into the Comments field that they accept the sabbatical and select **Actions → Accept & Complete** which will close the process
- **Application Under Review** – The faculty member will enter into the Comments field additional information requested by the Provost's office and attach supporting documents if needed and select **Actions → Submit to Provost 2nd Review** that will send the application back to the Provost
- **Application Denied** – The faculty member will enter into the Comments field that they have read the letter and select **Actions → Accept & Complete** which will close the process

If the application was under review it will be returned by the faculty member with their response. Once you review the response and materials select your response, fill out the form and attach your letter to the faculty member then select **Actions → Submit to Faculty 2nd Response**. The faculty member will enter their response and select **Actions → Process Complete** which will close the process.