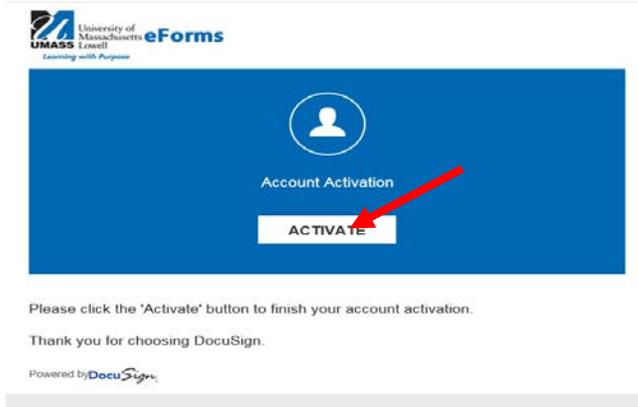


## TA Contract Approval Process – Effective April 2018

### STEP 1: INITIATOR– UMASS LOWELL AUTHORIZED PERSONNEL ONLY

UML Authorized users will be required to set-up a DocuSign account to be able to initiate a new contract or change form

- If you attended the TA-RA workshop held in May 2018, an account has set up for you
- If you did not attend the TA-RA workshop held in May 2018, and/or an account has not been set up for you, please email [help@uml.edu](mailto:help@uml.edu) to request a DocuSign Account for TA/RA .
- Once an account is created, you will receive an email with a link to activate your account.



Click to activate and set up your password.

Login to your DocuSign Account – <https://account.docusign.com> with credentials provided to you by UMass Lowell IT.

Once logged in, click on “Templates”



Click on Shared with Me



Contracts relevant to the TA-RA Process will be listed. Click on the contract you would like to use.

### To Initiate Student Pre-Hire Information Sheet for TA-RA Applicants

Name	Owner	Last change	
TA CONTRACT 2018-19 Eligible for matching	UMass Lowell eForms	5/7/2018 03:16 pm	USE
RA CONTRACT 2018-19 Eligible for matching	UMass Lowell eForms	5/7/2018 03:15 pm	USE
Student Pre-Hire Information Sheet for TA-RA Applicants Eligible for matching	Mordecai Ebhohon	5/7/2018 02:42 pm	USE

The workflow window will pop up for you to customize the workflow:

Scroll Down to edit subject line in "Message to All Recipients"

Change subject line to include your college name and student's name

For e.g: TA/RA Student Pre-Hire Information: FAHSS – John Smith

Do not edit the message content

**Message to All Recipients**

TA/RA Student Pre-Hire Information: College, Student First Name

Please complete the attached document and submit along with an unofficial transcript. This document is required to evaluate your eligibility for a TA/RA position.

**Advanced Options**

- Recipients can sign on paper
- Incomplete envelopes expire 30 days after send date
- Recipients are warned 5 day(s) before request expires

SEND ADVANCED EDIT DISCARD

Once you have received the completed Student Pre-Hire Information Sheet, please identify the signatories at each level for the particular TA/ RA contract approval.

Then proceed to initiate the TA Contract

## To Initiate TA Contract

Name	Owner	Last Change	
TA CONTRACT 2018-19 Eligible for matching	UMass Lowell eForms	5/7/2018 03:16 pm	USE
RA CONTRACT 2018-19 Eligible for matching	UMass Lowell eForms	5/7/2018 03:15 pm	USE
Student Pre-Hire Information Sheet for TA-RA Applicants Eligible for matching	Mordecai Ebhohon	5/7/2018 02:42 pm	USE

The workflow window will pop up for you to customize the workflow:

TA CONTRACT 2018-19

Recipients

- 1 Initiator  
Name: [Field]  
Email: [Field]
- 2 Dept. Admin  
Name: [Field]  
Email: [Field]
- 3 Dept. Chair/Supervisor  
Name: [Field]  
Email: [Field]
- 4 Dean Review  
Name: [Field]  
Email: [Field]
- 5 Student  
Name: [Field]  
Email: [Field]
- 6 Dean Approve  
Name: [Field]  
Email: [Field]
- 7 VPIW  
Steve Tello  
TAFAContracts\_VPIW@uml.edu
- 8 HR  
Payroll  
Payroll@uml.edu

Do not edit prepopulated email id's or names in Step 7 and 8

Scroll Down to edit subject line in "Message to All Recipients"

Change subject line to include your college name and student's name

For e.g: TA Contract 2018-19: KCS – John Smith

Do not edit the message content

Message to All Recipients

TA Contract 2018-19: College - Student First Name Last Name

Please review the attached TA contract(s) as assigned by your department for the upcoming academic semester/year and follow the prompts to add your information/signature in the appropriate field(s). By signing this contract, you agree to the

Advanced Options

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 380 days after send date
- Recipients are warned 10 day(s) before request expires

SEND ADVANCED EDIT DISCARD

This will initiate a contract and send an email to the Initiator to input student specific information. Once completed, the contract will follow the pre-determined workflow.

## STEP 2: Dept. Admin

Click on "Review Documents" link received via email to access contract  
When to login to DocuSign?

- Complete the required student information:
  - Student ID, Employee ID, Address, Email ID
  - College, Department, Degree program
  - Combo code for funding, stipend amount, step, hours
  - Date of initial hire
  - Supervisor information
  - Course assignments
  - Scope of work ( if admin is providing this information)
  - Student academic standing - Cum GPA & course grades for previous semester
  - Rationale for TA award if student does not meet minimum requirements
  - Performance evaluation (if admin is providing this information)

## STEP 3: Dept. Chair/ Coordinator - SIGNATURE

Click on "Review Documents" link received via email to access TA Contract

Verify:

- Student information, scope of work, hours and funding before signing

## STEP 4: Dean – INITIAL VERIFICATION & SIGNATURE

Click on "Review Documents" link received via email to access RA Contract

Verify:

- Satisfactory academic standing/ rationale for exceptions
- Scope of assigned TA work (if admin has not provided this information)
- Combo code/ speedtype for funding, stipend amount, step, hours
- Performance evaluation (if admin has not provided this information)
- Signs off and sends to student to furnish current GPA, next semester enrollment and under approved RCL (if any) and signature
- **Approves /Declines** based on satisfactory academic standing and course enrollment information.
- If Dean declines the contract, a brief reason for declining may be provided in the comments box. This comment can be seen by clicking on view history under other actions by all parties
- Contract process ends if Dean's office declines at this step

## STEP 5: Student – SIGNATURE & ACADEMIC STANDING/ ENROLLMENT

Click on "Review Documents" link received via email to access RA Contract  
Submit:

- Most recent unofficial transcript with latest GPA and course enrollment for upcoming semester.
- If under enrolled approved RCL must be uploaded
- GEO local dues & FERPA waiver forms as part of contract

Note: TA/RA appointments qualify for tuition waiver up to 9 UML credits

#### STEP 6: Dean – VERIFICATION & APPROVAL

Click on “Review Documents” link received via email to access RA Contract

Dean’s office verifies updated student information

- Updated satisfactory academic standing
- Satisfactory course enrollment information (full-time / waivers)
- Change of funding combo code/speedtype in comment box (if needed)
- Confirms review of student updated information by placing initials
- **Approves /Declines** based on satisfactory academic standing and course enrollment information.
- If Dean declines the contract, a brief reason for declining may be provided in the comments box. This comment can be seen by clicking on view history under other actions by all parties
- Contract process ends if Dean’s office declines at this step

#### STEP 7: Vice Provost – SIGNATURE

Click on “Review Documents” link received via email to access TA Contract

- Finalizes contract based on satisfactory review at Dean’s office
- Vice Provost will not receive contract if Dean declines to sign in Step 6

#### STEP 8: Payroll –For Employee Contract File & COMPLETION

Click on “Review Documents” link received via email to access RA Contract

- Processes payment of stipend
- Mark Docusign contract as complete
- Print and file contract as part of employee record

#### Note:

- **From Step 2 onwards**, users can complete form partially and return later to complete. To do so, please click on “Other Actions” - **Finish Later**.
- **From Step 2 onwards**, each party will receive an email requiring action - Click on “**Review Documents**”.
- All parties to the process can assign another person to sign or decline to sign by clicking on other actions menu.
- All parties receive an email confirmation upon completion of final Payroll step.

For questions regarding the TA approvals, process workflow and docusign usage – please contact [Sandhya\\_Balasubramanian@uml.edu](mailto:Sandhya_Balasubramanian@uml.edu) (x42374)