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 <u>help@uml.edu</u> 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.

	,		
	(\leq	
	Acco	ount Activation	
		CTIVATE	

Click to activate and set up your password.

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

Once logged in, click on "Templates"



Click on S	Shared with Me								
C									
Contract	s relevant to the	e IA-RA I	rocess	will de liste	ea. Click	on the con	tract you v	vould like	e to use.
To Initia	te Student Pre-	Hire Info	rmation	Sheet for	TA-RA	Applicants			
		ń	Ľ		al				0
	Learning with Purpose	номе	MANAGE	TEMPLATES	REPORTS				
	My Templates +	Shared wi	th Me			Qs	earch Shared Templates		∓ FILTERS
	Deleted	Name TA CONTRACT	2018-19				Owner UMass Lowell	Last change 5/7/2018	
	Shared With Me Shared Folders	Eligible for match	ling				eForms	03:16 pm	USE
	All Templates	RA CONTRACT Eligible for match	2018-19 ling				eForms	03:15 pm	USE
		Student Pre-Hin Eligible for match	e Information Shee	et for TA-RA Applicants			Mordecai Ebhohon	5/7/2018 02:42 pm	USE
The worl	kflow window w	vill pop u	p for yo	u to custor	nize the	workflow:	. 1		
		Stude	ent Pre-Hire Infor	mation Sheet for TA-R	A Applicants		*		
		1 Recip	Dept Office			NEEDS TO SIGN MO	DRE V		
			Name		8				
		2	Student						
			Name		8	2 11105 10 5161			
			Email Deni Office						
		5	Name		8	CC RECEIVES A COPY MO	DRE V		
			Email						
Scroll Do	wn to edit subj	ect line ir	n "Messa	age to All F	Recipier	its"			
Change s	subject line to ir	iclude yo	ur colle	ge name a	nd stud	ent's name			
For e.g: 7	TA/RA Student F	Pre-Hire I	nformat	tion: FAHS	S – Johr	Smith			
Do not e	dit the message	content							
	Message	to All Recipi	ents		Ad	vanced Options			
	TA/RA Stud	lent Pre-Hire Infor	mation: College,	Student First N	•	Recipients can sign on p ncomplete envelopes ex	aper pire 30 days after se	nd date	
	Please com	plete the attached	d document and	submit along with	• 1	Recipients are warned 5	day(s) before reques	t expires	
	an unofficia your eligibil	, I transcript. This c ity for a TA/RA po	locument is requ sition.	uired to evaluate					
				li					
	SEND	ADVANCED	EDIT DIS	SCARD					
							- 91 		
Once you	u have received	the com	pleted S	tudent Pre	e-Hire Ir	formation S	heet, plea	se identi	ify the
signatori	ies at each level	for the p	oarticula	r TA/ RA c	ontract	approval.			
Then pro	oceed to initiate	the TA C	ontract						

	Intract								
University UMASSE Lowell Learning with Purpor	*eForms	п номе	L Mana	GE TEMPLATES	II REPORTS				© 🧕
		Shared	with Me			Q Search Sh	red Templates		후 FILTERS
My Templa	My Templates +		Name			Owne	r	Last of tage	
Shared w	ith Me	TA CONTRAC Eligible for ma	CT 2018-19 atching			UMa eFor	s Lowell	5/7/2018 03:16 pm	USE
Shared Fo	lders ites	RA CONTRA	CT 2018-19 atching		UMass Lowell eForms		5/7/2018 03:15 pm	USE	
		Student Pre- Eligible for ma	Hire Informatio	on Sheet for TA-RA Applicant	ts	Morc	ecai Ebhohon	5/7/2018 02:42 pm	USE
e workflow w	i <mark>ndow w</mark>	vill pop	up for	you to custo	mize the	workflow:			
			TA CONT	RACT 2018-19					
			Recipient	ts					
		1	1	Name	8	Z NEEDS TO SIGN MORE V			
				Email					
			2 0	ept. Admin		NEEDS TO SIGN MORE -			
				Name	8				
				Email					
			3 De	pt. Chair/Supervisor	п	Z NEEDS TO SIGN MORE V			
			6	mail	2				
			4	an Bardan					
			4 De	an Review	日	Z NEEDS TO SIGN MORE Y			
			E	mail					
			5 Sb	actions		1			
			5 360 N	lame	8	NEEDS TO SIGN MORE Y			
			6	mail					
			6 De	an Approve		NEEDS TO SIGN MORE *			
			N	ame	13				
				172801					
			7 VP	W Tollo	7	🗾 NEEDS TO SIGN MORE ¥			
			T	ARAContracts_VPIW@uml.edu	8				
			• HH	ayroll	8	🖌 NEEDS TO SIGN MORE ¥			
			Р	ayroll@uml.edu					
			: -1/			0			
not edit prep	opulate	ed email	Id's o	r names in St	tep / and	8			
		oct lino	in "Me	ssage to All	Recinient	_//			
oll Down to e	dit subj				Recipient	5			
roll Down to e ange subject l	dit subj ine to ir	nclude v	our co	ollege name a	and stude	s nt's name			
roll Down to e ange subject l	dit subj ine to ir ract 201	nclude y 8-19· K	our co	ollege name a	and stude	nt's name			
roll Down to e ange subject l r e.g: TA Conti	dit subj ine to ir ract 201	nclude y .8-19: K	our co CS – Jo	ollege name a ohn Smith	and stude	s nt's name			
roll Down to e ange subject l r e.g: TA Cont not edit the r	dit subj ine to ir ract 201 nessage	nclude y .8-19: K e conter	rour co (CS — Jo nt	ollege name a	and stude	s nt's name			
roll Down to e ange subject l r e.g: TA Conta not edit the r	dit subj ine to ir ract 201 nessage Message	e to All Rec	rour co CCS — Jo nt	ohn Smith	Adva	nt's name			
roll Down to e ange subject l r e.g: TA Cont not edit the r	dit subj ine to ir ract 201 message Message	nclude y .8-19: K e conter e to All Rec	rour cc (CS — Jo nt :ipients	ollege name a ohn Smith	Adva	nt's name	sponsibility		
roll Down to e ange subject l r e.g: TA Cont not edit the r	dit subj line to ir ract 201 message Message TA Contra	act 2018-19: Col view the attache	COUR CO CCS — Je it ipients llege - Studer	t(s) as assigned by your	Adva Adva Rec Rec Rec Rec Rec Rec Rec Rec	nt's name	sponsibility days after se before reques	nd date t expires	
roll Down to e ange subject l r e.g: TA Cont not edit the r	dit subj line to ir ract 201 message Message TA Contra Please rev departmet follow the appropriat	Let include y .8-19: K conter e to All Rec view the attachen prompts to add te field(s). By sig	CCS — Jo CCS — Jo t :ipients Illege - Studen In a contract ing academi y your informa gning this cor	t(s) as assigned by your c semester/year and ation/signature in the tract, you agree to the	Adva • Ret • Ret • Ret	nt's name	sponsibility days after se sefore reques	nd date t expires	
roll Down to e ange subject i r e.g: TA Cont not edit the r	dit subj line to ir ract 201 nessage Message TA Contra Please rev departmen follow the appropriat	Act 2018-19: Col e to All Rec act 2018-19: Col view the attachen nt for the upcon prompts to add te field(s). By sig	CS — Je CS — Je t ipients Ilege - Studer d TA contrac ining academin y your informa yning this cor	the set of	Adva • Ret • Ret • Ret	nt's name	sponsibility days after se before reques	nd date t expires	
roll Down to e ange subject r e.g: TA Cont not edit the r	dit subj line to ir ract 201 message Message TA Contra Please rev departmet follow the appropriat	ADVANCE	CCS – John CCS – Cost CCS – Cost	the sense of the s	Adva • Rev • Rev • Rev • Rev • Rev	nt's name	sponsibility days after se before reques	nd date t expires	
roll Down to e ange subject r e.g: TA Cont not edit the r	dit subj ine to ir ract 201 message Message TA Contra Please rev departmet follow the appropriat	ADVANCE	CCS – John CCS – John CCS – John Cont CCS – John CCS – Contract Cont	the sense of the s	Adva • Rev • Rev • Rev • Rev • Rev	nt's name	sponsibility days after se before reques	nd date t expires	ormation

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 <u>Sandhya Balasubramanian@uml.edu</u> (x42374)