DocuSign Instructions for Completing Employee Grant Additional Compensation Forms

Step 1: Pre-Fill Requirements

Request Salary Analysis Report [Here].
  - This report is intended to help the employee fill out sections 3 (Additional Compensation Limits) and 4 (Calendar Year Additional Compensation).
  - Please note this report is a required attachment to the form in order to submit to workflow for approval.
  - HR will send a copy of the report to the employee only. If the employee would like to designate a proxy to also receive the salary analysis report, they may do so [here].

Step 2: Identify Workflow Signatories

Identify the Signatories at each level for the grant additional compensation form:
  - Enter your name and email
  - Enter the name and email of the employee (may be the same as above)
  - Enter the name and email of the principal investigator
  - Enter the name and email of your Financial Administrator:
    - FA_Engineering@uml.edu
    - FA_Sciences@uml.edu
    - FA_FAHSS@uml.edu
    - FA_HealthSciences@uml.edu
    - FA_Education@uml.edu
    - FA_SchoolofBusiness@uml.edu
  - Enter the name and email of the Employee’s Department Chair
    - Some Department Chairs may have a proxy in place so please be sure to confirm this information before starting the form, otherwise, this could delay approvals.
  - Enter the name and email of the Employee’s Academic Dean
    - Some Academic Deans may have a proxy in place so please be sure to confirm this information before starting the form, otherwise, this could delay approvals.
  - The remaining fields, Vice Chancellor for Research and Innovation and ORA Payroll, are hardcoded and the form will be routed to these departments after the previous stops approve.

Step 3: Completing the Form

- **Section 1: Employee Data**
  - Employee ID and Employee Name

- **Section 2: Requested Additional Compensation Data**
  - Grant Additional Compensation Appointment Begin Date and End Date
  - Combo Code (or Speedtype) of the grant funded additional compensation. Only one form can be used for each grant.
  - Total Amount of Additional Compensation requested

- **Section 3: Additional Compensation Limits**
  - FTE Annual Salary (number should be the same as what is listed on the employee’s salary analysis report)
  - Total Limit (number should reflect what is listed on the salary analysis report): Faculty salary limit is 33% and Professional Staff at 12%
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Step 3: Completing the Form (continued from page 1)

- **Section 4: All Calendar Year Additional Compensation (both paid and scheduled to be paid)**
  - Data should reflect what is listed on salary analysis report.
  - If employee is submitting multiple forms at once, this data should be added to each form
  - Attach salary analysis report to form

- **Section 5: Performance of Duties**
  - Please indicate type of employee (Professional Staff, AY Faculty, Calendar Year appointed Faculty, Faculty Administrator)
  - Confirm if additional duties will be performed outside of normal working hours and if not, indicate if employee will use vacation and/or personal time while performing duties.

- **Section 6: Certification/Approvals**
  1. **Form Initiator** – digitally sign and submit to workflow.
  2. **Employee**: Could be the same as form initiator so employee may need to sign twice; digitally sign and submit to workflow.
  3. **Principal Investigator of grant funded add comp** – review and if you approve, digitally sign and submit to workflow.
  4. **Financial Administrator** – review and if you approve, digitally sign and submit to workflow.
  5. **Department Chair** – review and if you approve, digitally sign and submit workflow.
  6. **Academic Dean** – review and if you approve, digitally sign and submit to workflow.
  7. **Vice Chancellor for Research and Innovation (hardcoded workflow field)** – review and if approved, digitally sign and submit to workflow.
  8. **Provost** – only if additional compensation is over 33%, the Provost’s signature will be secured after VCRI reviews/approves.
  9. **ORA Payroll (hardcoded workflow field)** – process for payment.

**Notes:**
- A form can be saved and finished at a later time. To do so, please click on “Other Actions – Finish Later”.
- Each party will receive an email requiring action as part of the workflow process. Click on “Review Documents”.
- All parties will receive an email confirmation upon completion of the form either by approval or if declined.