TA Contract Approval Process – Effective April 2017

This user guide is intended to assist all parties in understanding their role in the new TA-RA contract approval process. For detailed information, please visit https://www.uml.edu/Grad/Accepted-Students/TARAContracts.aspx

STEP 1 A: Pre-Hire – UMass Lowell Authorized Personnel only

Before you begin the TA/RA contract approval process, please gather required information about student.
- Click on “Student Pre-Hire Information Sheet for TA- RA Applicants” to begin the Docusign paperless process.
  - Input your name, email id and the Student name and email id in the “Power For Signature Informantion” page and click on begin
  - In the pre-hire information sheet, select type of contract and finish to send to student.

The “Student Pre-Hire Information Sheet for TA- RA Applicants” (pdf) document can also be emailed to a student to complete and submit to your office along with the most recent unofficial transcript.

STEP 1 B: Prefill – UMass Lowell Authorized Personnel only

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Email ID</th>
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<tbody>
<tr>
<td>Prefill</td>
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<tr>
<td>Dept. Admin</td>
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<tr>
<td>Dept. Chair/ Coordinator</td>
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<tr>
<td>Dean</td>
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<tr>
<td>Student</td>
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<tr>
<td>Dean (Approval)</td>
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<tr>
<td>Vice Provost (I &amp;W)</td>
<td>Scott Latham</td>
<td><a href="mailto:TARAContracts_VPIW@uml.edu">TARAContracts_VPIW@uml.edu</a></td>
</tr>
<tr>
<td>Payroll</td>
<td>Payroll</td>
<td><a href="mailto:Payroll@uml.edu">Payroll@uml.edu</a></td>
</tr>
</tbody>
</table>

- Begin contract creation and approval process by accessing link: TA CONTRACT
- Input the names and email id’s of approvers in the “Power Form Signature Information”
- Click begin
- In the docusign document, complete the required student information
  - Student ID, Name
  - Employee ID (for returning students only), address, contact number, email id
- Click Finish to begin contract approval process

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### STEP 2: Dept. Admin

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

- Before you begin, please ensure you have the following information:
  - College, Department, Degree program
  - Student academic standing - Cum GPA & course grades for previous semester
  - Rationale for TA award if student does not meet minimum requirements
  - Course assignments
  - Scope of work for assigned work
  - Supervisor information
  - Date of initial hire
  - Combo code for funding, stipend amount, step, hours

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

Click on “Review Documents” link received via email to access RA 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
- Supervisor information
- Combo code/ speedtype for funding, stipend amount, step, hours
- Signs off and sends to student to furnish current GPA, next semester enrollment and under enrollment approvals (if any) and signature

### 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 upcoming semester course enrollment.
- If under enrolled, waiver approval for reduced course load/academic petition
- GEO local dues & FERPA waiver forms as part of contract
### STEP 6: Dean – VERIFICATION & APPROVAL

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

Dean’s office verifies updated student information by placing initials:

- 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 RA 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

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

### Note:

- **Step 1 cannot be saved to be finished later.** It must be completed at one stretch. This role can be Dept. Admin or anyone else assigned by dept. admin.

- **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 contract either by approval or if declined

For questions regarding the TA approvals, process workflow and docuSign usage – please contact Sandhya.Balasubramanian@uml.edu (x42374)