**TA Contract Approval Process – Effective April 2018**

<table>
<thead>
<tr>
<th>STEP 1: INITIATOR – UMASS LOWELL AUTHORIZED PERSONNEL ONLY</th>
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<tbody>
<tr>
<td>UML Authorized users will be required to set-up a Docusign account to be able to initiate a new contract or change form</td>
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<tr>
<td>• If you attended the TA-RA workshop held in May 2018, an account has set up for you</td>
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<tr>
<td>• 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 <a href="mailto:help@uml.edu">help@uml.edu</a> to request a Docusign Account for TA/RA.</td>
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<tr>
<td>• Once an account is created, you will receive an email with a link to activate your account.</td>
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Click to activate and set up your password.

Login to your Docusign Account – [https://account.docusign.com](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**

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

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

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

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

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 (x42374)

Rev. April 2018