HCM 9.0 Business Process Guide
Summer Term Assignment/Appointment
Dept/Dean’s Office End User
Complete an AP101S – 2357 in DocuSign
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Beginning Summer Term 2019, all appointment/assignment requests for self-support teaching will be submitted through DocuSign. This will allow an all paperless process.

Summary of the process:
- College/department completes the AP101S – 2357 form and routes for signatures
- Department head reviews documents, signs and routes to the college for review
- A designated person at the college level (i.e., HR business partner, associate dean, budget analyst) reviews the document, signs and routes to the dean
- Dean reviews document, signs and routes to payroll imaging system
- Academic Personnel enters assignment into PeopleSoft referencing the imaged document, and sends pay request to Payroll for processing

Process Detail

The DocuSign AP101S – 2357 form is accessed from the Academic Personnel Summer Term webpage.

https://academic-personnel.calpoly.edu/content/summer

Processing Steps

1. Navigate to the Academic Personnel – Summer Term webpage.
2. Click on the AP101S-2357 form link
3. Follow the instructions on the PowerForm
### Processing Steps

**Establishing workflow** - This step populates names and email addresses that will be used to send the form to the correct persons for signature.

- **The first** Role, the Requestor, is the person completing the form.
  - Enter your name and email address
- **The second** Role is the faculty member that is receiving the summer assignment.
  - Enter Name: Instructor’s Last Name-Dept
  - Enter Email: Do not override the pre-populated academic personnel email address
- **The third** Role is the department head/chair
  - Enter name and email address
- **The fourth** Role is the college level reviewer (determined by your college process)
  - Enter name and email address
- **The fifth** Role is the budget analyst (this is optional)
  - Enter the name and email address
- **The sixth** Role is the dean
  - Enter the college dean name and email address

- After all names and email addresses are populated, click the **Begin Signing** button.

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### Screen Shot

![Processing Steps Screen Shot](image)

- You will receive a message of your success and that an email has been sent.
- The email sender is **Academic Personnel via DocuSign**
- The subject is **AP101S-2357-Instructor Name**
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**Processing Steps**

- Go to your email inbox and locate the email
- Click on the Review Documents button
- You will be prompted for your portal login.

**Screen Shot**

- The form will display – click the **Continue** button
- Complete the form.
- Choose a position number from the second page or enter NEW.
- Final WTUs need to be rounded up to the tenth.
- The **Per Unit Rate** and **Total Term Salary** will calculate automatically.
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Processing Steps

- Click the **FINISH** button at the top of the form.

Screen Shot

- You will have the option to download or print the form.
- At this point the form has been sent to the next person on the workflow that you established earlier in the process.

Save a Copy of Your Document

Your document has been signed

If you would like a copy for your records, select **Download** or **Print and save**.