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

<table>
<thead>
<tr>
<th>Processing Steps</th>
<th>Screen Shot</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Navigate to the Academic Personnel – Summer Term webpage.</td>
<td></td>
</tr>
<tr>
<td>- Click on the AP101S-2357 form link</td>
<td></td>
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<tr>
<td>- Follow the instructions on the PowerForm</td>
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</tbody>
</table>
## Processing Steps

<table>
<thead>
<tr>
<th>Establishing workflow</th>
<th>Screen Shot</th>
</tr>
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<tbody>
<tr>
<td>This step populates names and email addresses that will be used to send the form to the correct persons for signature.</td>
<td><img src="image" alt="Screen Shot" /></td>
</tr>
</tbody>
</table>

- 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.

## Screen Shot

- 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**
**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.

- 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.
**Processing Steps**

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

- 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.

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**Screen Shot**

- **Complete an AP101S – 2357 in DocuSign**

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