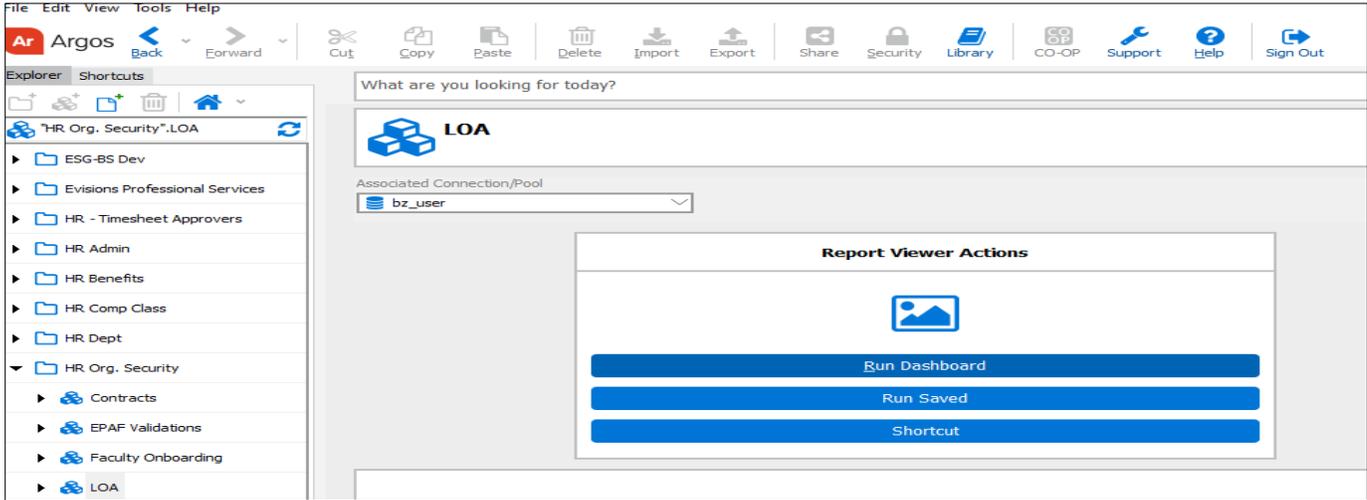


Summer Session Process

*If you do not have the Argos app downloaded please view

<https://montana.hosted.panopto.com/Panopto/Pages/Sessions/List.aspx?folderID=c0bb9afb-dfe0-4016-8048-ae1c01252f1f> for instructions and walk through. Otherwise, go to <https://ort.montana.edu/> and sign in with your NetID and password.



In Argos select HR Org Security, then LOA and Run Dashboard.

OTHER CONTRACTS	NAME	POSITION	FORM	STATUS	SCHEDULED FOR DOCUSIGN	LAST MODIFIED	User
0	<Create New>						
0	McM, Reb	4C5569	Professional and/or ...	EDIT	Will not move	10/2/2020 1:32:55 PM	ann.robinson2
0	Nan, Sar	4A6460	NTT	ERR	Errors, see comments	10/12/2020 2:03:03 PM	ann.robinson2

Screen will be blank the first time, highlight the 0 line then Add/Edit Form. Or click on the correct 4Xxxxx job from last year. **If you are new to a department and this employee did have a summer session appointment last year use form Filter Summer Session NTT or Summer Session TT, then search by employee name. Once last year’s contract is found highlight then select Advanced Contract Controls and select Take Ownership.

Employee Information Page

If updating a previous year's Summer Session appointment fields 1-8 should be populated, update with any changes.

1. Choose **LOA form Type:** Summer Session NTT or Summer Session TT
2. Enter Last Name, First Initial or First Name or GID use Tab, Enter or the Search button
 - a. use drop-down if more than 1 employee matches search criteria
3. Enter **Department** name or org number
4. Choose **Position Number** associated with Department (drop-down) *if position number isn't listed enter position number into Step #3 to get the current Banner Dept assignment.*
5. **Job Duties:** If teaching, must have course/rubric/# credits
6. For Summer Session make sure **TS Method: P**
7. Choose **Timesheet ORG** during Summer Session this should be the department org
8. Choose **Faculty Rank**
9. *If Visiting Faculty/Artist* switch drop-down (default is No)
10. Suffix Description highlight Suffix that needs to be updated.
 - a. Select **Edit Suffix Pay Info** to enter or update
 - b. When a suffix is listed that will not be used highlight and use **Remove Suffix Pay**

MONTANA STATE UNIVERSITY

Employee Information

[Contact ESG Support](#)

LOA Form: Summer Session TT

Last, First Name or ID Search: Search

Name: Moose, Mumfred -01790550

Department Search: Search

Department: 412200 - Microbiology & Cell Biology

Position Number: 4X6115 - Summer Session- Microbiol Commun

Display Title:

Current Positions:

Position	FTE	TITLE	DEPARTMENT	Suffix

Time Sheet: TS Org Search: Search

TS Method: P TS Org: 412200 - Microbiology & Cell Biology

Faculty Rank: Associate Professor

Visiting Faculty/Artist: No

Benefit Information: I intend to hire this person for 6 months or longer at 0.5FTE or greater. (If you are unsure please select No) No

OCHS Pre-Approved Multi-session Contract: No

Suffix Description	Start Date	End Date	Contract Amount	FTE	Edit Suffix Pay Info

1 items, 1 selected

Remove Suffix Pay

System Log:

TIME_STAMP	NOTE
11 AUG 21 14:57:03	ann.robinson2:Save Form
11 AUG 21 14:51:08	ann.robinson2:Save Form
11 AUG 21 14:43:18	ann.robinson2:Save Form

Job Duties (Course Rubric):22 /4000 (click to refresh)

Teaching ABC 123 (3cr)

Overload Job Duties (Course Rubric):0 /600 (click to refresh)

At least one Provost, VP or President signer is required

Entry	Title	Name	Email
Signer1	Fiscal Ma...		
Signer2	Fiscal Ma...		
Signer3	Fiscal Ma...		
Signer4	Fiscal Ma...		
Signer5	Fiscal Ma...		
Signer6	Fiscal Ma...		
Signer7	Departme...		
Signer8	Dean Dire...		
Signer9	VPREDGE		

10 items

Tests

Test	Status
Department and Position	PASS
TS Org	PASS
Job Duties	PASS
VP or President Signer	FAIL
dd_form_name.FORM_ERR	PASS

5 items

Note: When Removing a Suffix. You will need to Edit a suffix and click Save Pay Info to refresh the Contract Totals.

Return No Changes Save and Return Save Form

Summer Session Pay Info Page

Summer Session Pay Info Page

1. **Suffix:** Select the part of the summer session appointment working on.
 - a. Each A session option will be its own suffix page with the predetermined dates for that session auto populating. B, C and D sessions have multiple options to accommodate different funding requirements throughout the appointment and assigning dates for changes in funding and have open date ranges to enter just like any of the LOA appointments. **Important- you must follow the pay period start and end dates.** Important-
2. For **Pay Information**, this may show information from the last time the contract was built. **This will need to be updated.**
3. **Contract Pay** this is for any units that do not pay by workload units. Enter the Full amount the department is planning to pay for the new contract period. *Gallatin College please use Contract Pay.*
4. **Pay per WLU/Credit Per Contract** if you do pay by WLU or Credit, enter what you are going to pay for the semester; that will be multiplied by the number of **Workload Unit/Credit Base** field.
5. **Amount per Pay:** This field will populate from Banner. Remove info to put current data in field 6 or 7; If already calculated, make sure this field reflects what the biweekly pay will be.
6. **Workload Unit/Credit Base** need to be updated for any teaching positions. Summer session has an allowable teaching of 8 credits. Any special exceptions must have approval from the Provost.
7. **FTE** field- leave blank.
8. **Auto Calculate FTE** dropdown and when to use. FTE has a limitation in Banner of 3 decimal places (0.000)
 - a. **Banner Position:** whatever is currently in Banner for this position should be used as the FTE.
 - b. **Workload Credit Calc:** Pay per WLU is entered and number of WLU entered.
 - c. **FTE Entry:** when the FTE is not for teaching, so not calculated off the WLU/Credit Base %.
9. **FTE used in Calcs** will update and either duplicate the **FTE** field or calculate off the **Workload Unit/Credit Base**.
10. **AY Base Salary** will reflect the base salary in Banner as of 4/1 of the current year. If they do not have a base salary due to being a Visiting Professor or appointments have been inconsistent, enter the average for your department this will then calculate the 1/9th, 2/9th and 3/9th fields once you click **Save Pay Info**.
11. **Total NSF Funds** this will need to be totaled and entered manually to populate the Summer Session form.
12. **Summer Session Specific Information** will update as you complete the suffixes to be able to track the total contract.
13. When pay info has been updated, use the **Save Pay Info**; this will populate all the calculation fields on the right.

Repeat 1-10 plus Job Labor Distribution for each session or section of summer session. Each Suffix page for each section will generate an EPAF.

Job Labor Distribution

This section needs to be completed on each suffix!

The screenshot shows a web form titled "Job Labor Distribution: (saves on Save Perce". It features a table with columns for "#", "Percentage", "Index", and "Account". The table contains two rows: row 1 with values 1, 100, 413100, and 61130; and row 2 with values 2, blank, blank, and blank. To the right of the table are input fields for "%", "Index", and "Account", with values 100, 413100, and 61130 respectively. Below these are "Total" (100) and "Missing" (0) fields. At the bottom right are "Return" and "Save and Return" buttons. A "Delete Percent" button is also present. Blue arrows with numbers 1 through 5a point to various elements: 1 points to the table, 1a to the selected row, 2 to the % field, 2a to the Save Percent button, 3 to the Index field, 4 to the Missing field, and 5 to the Save and Return button.

#	Percentage	Index	Account
1	100	413100	61130
2			

2 items, 1 selected

%: 100 Index: 413100 Account: 61130

Total: 100 Missing: 0

Buttons: Save Percent, Delete Percent, Return, Save and Return

1. Current labor distribution loaded.
 - a. Highlight a specific row to edit in boxes to the right or
 - b. **Delete Percent** if the index will no longer be used.
2. Boxes for updating percentages, Index, and account if information is missing or needs to be added
 - a. **Save Percent** to save information. This step can be repeated as many times as needed to come up with 100%
3. Total will display current total percentages.
4. Missing will indicate how many percentage points are missing to get to 100. (If number is a negative, then the total is over 100%).
5. **Save Return** saves all information on this page and returns to Employee / Job Selection Form.

After information updated you will be returned to the Employee screen.

Routing - Summer Session NTT and TT

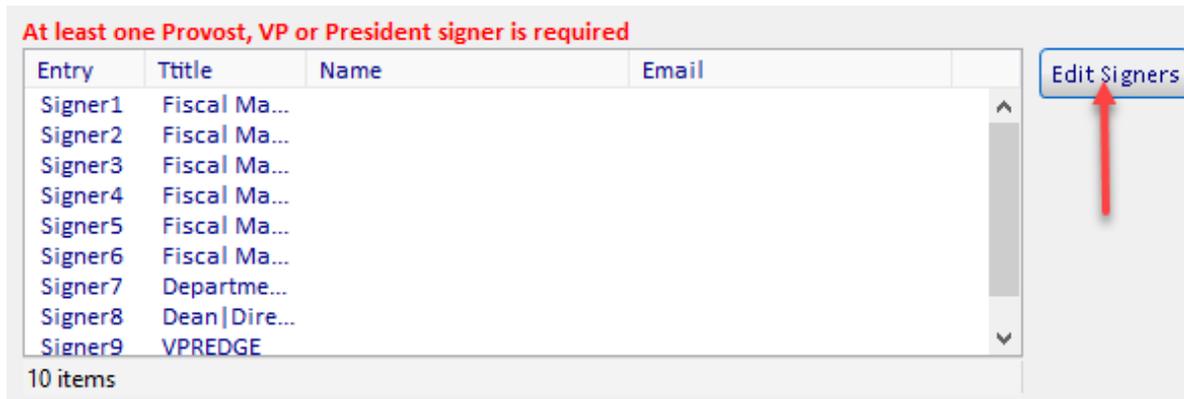
Summer session has the most flexible routing queues. There are 8 approvers spots for Dept Head, Dean and up to 6 fiscal approvers (enter only ones needed)

At least one Provost, VP or President signer is required

Entry	Ttitle	Name	Email
Signer1	Fiscal Ma...		
Signer2	Fiscal Ma...		
Signer3	Fiscal Ma...		
Signer4	Fiscal Ma...		
Signer5	Fiscal Ma...		
Signer6	Fiscal Ma...		
Signer7	Departme...		
Signer8	Dean Dire...		
Signer9	VPREDGE		

10 items

[Edit Signers](#)



From the Employee Information page select Edit Signers.

Provost and/or VPREDGE are required based on type of appointment and funding. The general rule is that teaching should be approved by the Provost Office, while Research is approved by OSP and VPREDGE.

Choose your signers. *In order for it to save, you must have a title and name*

1. If you already have a saved Signer List select from drop-down
 - a. then select Use List
2. Labor Distribution Summary is listed as a reminder so if grant or NSF managed funds are being used, assign the Fiscal Manager
3. To add a signer: Highlight Signer # you need to assign (skip any Signer lines not needed) *Do not move Signers 7-10.*
4. Select Title from the Drop-Down
5. Add last name or last name, first name to Signer Search (Make sure box is clicked to “search outside title” always when assigning Fiscal Managers or when needing to assign a proxy signer AKA: Julia Heard for Provost) select search
6. Then select name in drop-down
7. Save the Signer (*Repeat for any signers needed*)
8. Choose your Payroll Team letter select Save Payroll Team
9. If Employee needs to be updated to a not montana.edu default email,
 - a. Select New Email Address in the dropdown and
 - b. enter in the New Email Address in the open field
 - c. Save Employee Email
10. Click Return

Contact ESG Support

Moose, Mumfred -01790550 4X6115 - Summer Session- Micro & Immuno - FS - Summer Session Faculty Summer Session TT

Signer List: **Reload Lists** **Delete Selected List**

Entry	Label	Name	Email
0 items			

1a **Use List**

V

Entry	TITLE	Name	Email
Signer1	Fiscal Ma...		
Signer2	Fiscal Ma...		
Signer3	Fiscal Ma...		
Signer4	Fiscal Ma...		
Signer5	Fiscal Ma...		
Signer6	Fiscal Ma...		
Signer7	Departme...		
Signer8	Dean Dire...		
Signer9	VPREDGE		
Signer10	PROVOST		

10 items, 1 selected **Reset Signers**

Return 10

Labor Distribution Summary:

N	Percent	Index	Account
1	100	413100	61130

2

Signer Search: (Last, First GID) Heard **Search** Search outside Title

Title: PROVOST Names: Heard, Julia L **Save Signer** 7

At least one Provost, VP or President signer is required

Name Signer List: **Save as List with Signers and Name**

Payroll Team: **Save Payroll Team**

Employee email is automatically generated Address for changes: **Save Employee Email** 9c

Employee Email Address: EML.m.moose@montana.edu (Preferred) **Save** 9a

New Email Address: **Save** 9b

Tests

Test	Status
Department and Position	PASS
TS Org	PASS
Job Duties	PASS
VP or President Signer	FAIL
dd_form_name.FORM_ERR	PASS

5 items

Note: When Removing a Suffix. You will need to Edit a suffix and click Save Pay Info to refresh the Contract Totals.

Return No Changes **Save and Return** **Save Form**

1. Make sure none of the Test Status say FAIL, if so, correct as needed
2. Click Save and Return to get to the LOA screen.

Letter of Appointment Training Contact ESG Support
HR Departmental Admin Training 2/15/2022 5:11:33 PM

List

Refresh Contracts View Deleted Form Filter: ALL Search:

Other Contracts	Name	Position	Form	Status	Scheduled for DocuSign	Last Modified	Completer	Create Date
0	<Create New>							
5	Moose, Mumfred	4A6113	FY Faculty Biweekly	EDIT	Will not move	12/15/2021 ...	ann.robinson2	12/14/2021 ...
5	Moose, Mumfred	4X6115	Summer Session TT	EDIT	Will not move	3/21/2022 1...	ann.robinson2	8/11/2021 2...
5	Moose, Mumfred	4X6106	Summer Session NTT	EDIT	Will not move	3/21/2022 1...	ann.robinson2	5/20/2020 1...
5	Moose, Mumfred	4X6115	Summer Session NTT	EDIT	Will not move	12/14/2021 ...	ann.robinson2	8/11/2021 2...
5	Moose, Mumfred	4A6113	NTT	ERR	Errors, see co...	1/14/2022 1...	ann.robinson2	12/14/2021 ...
5	Moose, Mumfred	4A6791	Gallatin College 16CR	EDIT	Will not move	12/14/2021 ...	ann.robinson2	12/14/2021 ...

7 items, 1 selected

Other Contracts

Employee Name	Form	Position	Status	Completer Email
Moose, Mumfred	Summer Session NTT	4X6106	EDIT	ann.robinson2@montan...
Moose, Mumfred	NTT	4A6113	ERR	
Moose, Mumfred	Gallatin College 16CR	4A6791	EDIT	
Moose, Mumfred	FY Faculty Biweekly	4A6113	EDIT	

Send selected to DocuSign **Rebuild DocuSign** **Cancel DocuSign** **Advanced Contract Controls**

All signers Must Resign (only valid if Still in DocuSign)

1. Highlight the contract you're working on
2. Double check that none of the Other Contracts will cause overage
3. Then click "Send selected to DocuSign"
4. It will wait for validation to see if there are other contracts submitted. Once that has happened, it will route via DocuSign.
5. You will receive an email that looks similar to this. It will show you the contract you just built.

Please Review & Act on These Documents

Montana State University
Montana State University

Please read the **Electronic Record and Signature Disclosure**.
 I agree to use electronic records and signatures. CONTINUE

3/9: 16,666.67

A. TEACHING APPOINTMENT: No Grant Funding allowed for Section A/account used 61130

Session	Amount Paid	Index: Distribution	
4x4 Session 1	\$.00		Total Credits: 315
4x4 Session 2	\$.00		
4x4 Session 3	\$.00		
Summer Intercession	\$.00		Total Amount: 3,600.00
6 wk Session 1	\$ 3,600.00	413200:100	<i>Not to Exceed 2/9th AY base Salary</i>
6 wk Session 2	\$.00		
Late Summer	\$.00		
Full Session	\$.00		

B. RESEARCH APPOINTMENT (Non-State funded activity, including teaching associated with grants) account used 61123

Start Date / End Date	Amount Paid	Index: Distribution	
06-JUN-22/29-JUL-22	8,000.00		Total FTE %: 0
/	.00		
/	.00		
/	.00		
/	.00		
/	.00		
TOTAL FROM NATIONAL SCIENCE FOUNDATION FUNDS: -.00			Total Amount: 8,000.00
Job Duties: (List courses and credits)			<i>Not to Exceed 3/9th AY base Salary</i>
Teaching ABC 123 (3cr)			<i>NSF maximum 2/9th AY base Salary</i>

Review the contract and click finish to begin the routing process. If there are errors on letter click other actions, then decline to sign and go back to Argos. The letter will not route until you complete this step.

Done! Select Finish to send the completed document. **FINISH** OTHER ACTIONS ▾

MONTANA STATE UNIVERSITY
NON-TENURE TRACK FACULTY
2021 SUMMER SESSION FORM (SSF)

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com

If any contracts are in error status or are rejected by an approver, they will return to you in Argos and a contract will not be generated. Be sure to check your dashboard in Argos and the status of each contract until they are finalized in DocuSign.