Contract Application User Manual

The **Contracts Application** uses a person-centric design and built-in routing to simplify the process of creating, editing, and viewing the status of appointment requests.

Terminology and Process Information

With any new process or process changes, it's important to develop a shared vocabulary for referring to appointments and contracts submitted and tracked in the new Contracts Application. The following page contains information about terms used in this manual and the new application.

Terminology

Person: Also "instructor" -- changed to match HRS terminology -- this is the recipient of a contract.

Appointment: This refers to semester- or term-specific information about pay and duties.

Appointment Request: This is the completed combination of a person, appointment, and courses/non-teaching responsibilities submitted by departments through the Contracts Application.

Contract: This is the final result of an approved appointment request, sent to a person.

Appointment Request Statuses

Created: Appointment request started in a department, not yet sent to College HR.

Edited: Appointment details (payment information, courses/responsibilities) have been changed.

Submitted: Appointment submitted by a department, waiting for College HR approval.

Escalated: Appointment referred to the appropriate Associate Dean for additional verification.

Approved: Appointment has been verified by College HR, waiting for contract generation.

Contract Generated: Contract has been generated and sent to the instructor for approval.

Acknowledged: Contract has been received back from the instructor.

Accessing the Contracts Application

The Contracts Application can be accessed using your ePantherID and password at:

https://web.uwm.edu/contract-application/

If you can't log in, you may not have access yet -- please e-mail L&S HR at **ls-contracts@uwm.edu**. Technical questions or issues should be addressed to the L&S Web Team at **ls-web@uwm.edu**.

What do you think?

We're always interested in hearing about your experiences or ideas for improving the L&S Contracts Application (or this manual!) – please send your feedback to **ls-contracts@uwm.edu**.

Dashboard

The dashboard is the first screen that appears when you log in to the Contracts Application. It displays all your department's contracts and categorizes the contracts by the stage of the contracts in the contract lifecycle.

Creating an Appointment Request

Creating an appointment request involves four steps: selecting a person, creating an appointment, adding courses and non-teaching responsibilities, and submitting the appointment request. If you're creating an appointment with an existing employee, you can use the global search box to locate this person and skip to the **Creating an Appointment** section below.

Adding a Person

Always check to see if the person is already in the system before you decide to add them. To do this, use the global search box in the header of all pages. If the person doesn't exist begin adding a new person by clicking the **Add Person** button in the header to display the Add New Person form.

Before adding a person, you should know their date of birth, addresses (both physical and campus/home emails), educational information, and citizenship information. The home e-mail address will be especially vital to support the move to e-mailing completed contracts to instructors.

All fields are required unless otherwise noted – because of timing with HRS paperwork, *UWM Email* and *Emplid* are not required. Fill in the required information and click the **Add New Person** button at the bottom of the page to finish adding the new person. You'll be forwarded to the person data page where you can begin creating a new appointment request.
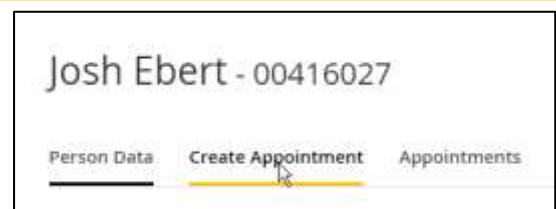
Creating an Appointment

After you've added a new person or used the global search box to find an existing person, click the **Create Appointment** link to begin a new appointment request.

Enter the appointing department, job title, and term of the appointment. By default, you'll only have access to create appointments in your own unit(s). If you don't see your unit listed in the Department dropdown list, please e-mail **ls-contracts@uwm.edu** for access.

Enter any additional notes or information in the *UW System Employment History* and *Notes* textboxes, keeping in mind that any information in these boxes will be available to all users of the application. While you're only able to create appointments in your own unit(s), you can view **all** appointments to allow viewing historical appointments for your instructors regardless of the appointing unit.

Need help with your appointment? If you have questions about terminology or the fixed-term appointment process, please e-mail L&S HR at **ls-contracts@uwm.edu**.

When you've finished entering appointment information, click the gold **Create Appointment** button at the bottom of the form to create your appointment and display the appointment information page:

To edit any of the basic appointment information, you can click the gold **Appointment Actions** dropdown button and select **Edit Appointment** button in the upper right. After making your edits, you'll need to provide a description of your changes for the appointment log before you click the gold **Update Appointment** button:

Adding Funding, Courses, and Non-Teaching Responsibilities

Important: Skip this section and continue to GA Contracts on page 8 if you are creating a Graduate Assistant (GA) offer letter.

The last step before submitting an appointment request is to add the funding, courses, and any non-teaching responsibilities associated with an appointment. Near the
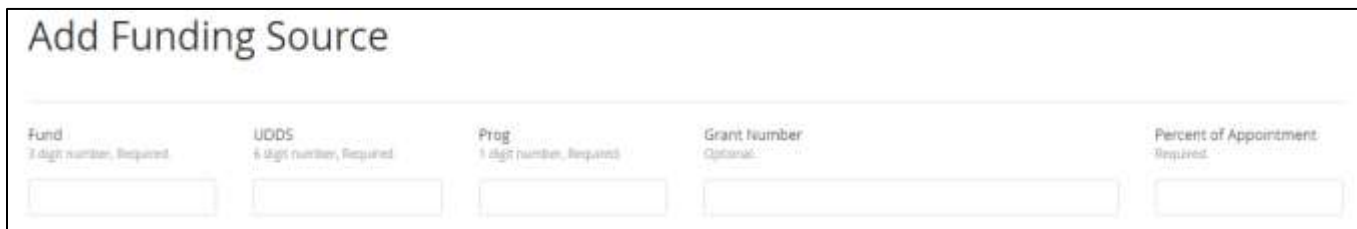
bottom of the appointment information page, you'll see sections for *Funding*, *Courses* and *Non-Teaching Responsibilities*:

Take note of the *Percentage* field for courses and duty. This represents the FTE % that will correspond with each duty for an appointment; for example, a 3-credit course will typically represent 25% a semester appointment. The percent for funding is different, in that it is the percentage of the appointment to be paid from the fund.

If, as shown above, the total percentage of duties and courses doesn't match the total FTE % of the appointment or if the funding percent don't sum to 100%, you'll get a cautionary notification – it's possible to submit an appointment request with this message; it's just a reminder that you may have missed some of the appointment's duties.

To add a funding source, click **Add Funding Source** button to bring up the Add Funding Source Form. It will ask for the fields of UW System funding string.

To add a course, click the **Add Course** button to bring up the Add a Course page shown on the next page:

Add a Course

Subject
Required

Course Number
Required

Type
Required

LEC

Section
Required

Course Title
Required

Teaching Credits

Percentage

○ Add Course

Most of this information is self-explanatory – the one potentially confusing field is *Teaching Credits*. In the majority of cases, this will be the number of credits associated with the course; however, in cases of team teaching or other special circumstances, it should be the number of credits that this person is responsible for teaching. As mentioned above, the *Percentage* should be the FTE % that each course represents. When you've entered your course information, click the **Add Course** button to return to

the appointment information page, where your new course appears.

To modify or remove an existing course from an appointment, click the edit icon (outlined in red to the right) next to the appropriate course to bring up the existing details for editing.

Courses

	SUBJECT	COURSE	SECTION	TITLE	CREDITS	PERCENTAGE
✎	BIO SCI	150	LEC 1	Foundations of Biological Sciences	3	25%

Add Course

To add a non-teaching duty to an appointment, click the **Add Non-Teaching Responsibility** button to display the Add a Non-Teaching Responsibility Page:

Add a Non-Teaching Responsibility

Non-Teaching Responsibility

Percentage

O Add Non-Teaching Responsibility

Provide a description of the appointment activity and, again, use the *Percentage* field to enter the FTE % that the duty represents, then click the **Add Non-Teaching Responsibility** button to add the duty and return to the appointment information page. As with courses, you can modify or delete an existing non-teaching responsibility by clicking the edit icon to the left of any duty.

Submitting Your Appointment Request

The last step in the appointment request process is the actual submission; you can accomplish this from two places on the dashboard. The first is by clicking the green **Submit** button at the right of any appointment request you're currently editing:

Currently Editing

Show 10 ▼ entries   Search:

▲ PERSON	DEPARTMENT	APPOINTMENT	STATUS		
Elmer Fudd	Foreign Languages and Literature	Fixed Term Associate Lecturer	Created 5 🦴	⟳ SUBMIT REQUEST	ACTIONS ▾

Showing 1 to 1 of 1 entries   Previous 1 Next

Alternatively, you can click on the name of the person (as shown in the screenshot on the previous page) to bring up the appointment information page, where you can review the details of an appointment before clicking the green **Submit Contract Request** button in the upper right of the page:

Josh Ebert - 00416027

Person Data   Create Appointment   Appointments

« Back to Josh Ebert's Appointments

Appointment - 16922   ⟳ Submit Contract Request   ☑ Edit Appointment

After submission, you'll be able to track your appointment request by following the *Status* column in the **Submitted** category on the application dashboard.

Note: Continue to GA Contracts on page 8 if you are submitting a GA contract.

GA Contracts

After a GA contract is submitted, one of the following will occur, depending on the threshold headcount determined by your department's associate dean:

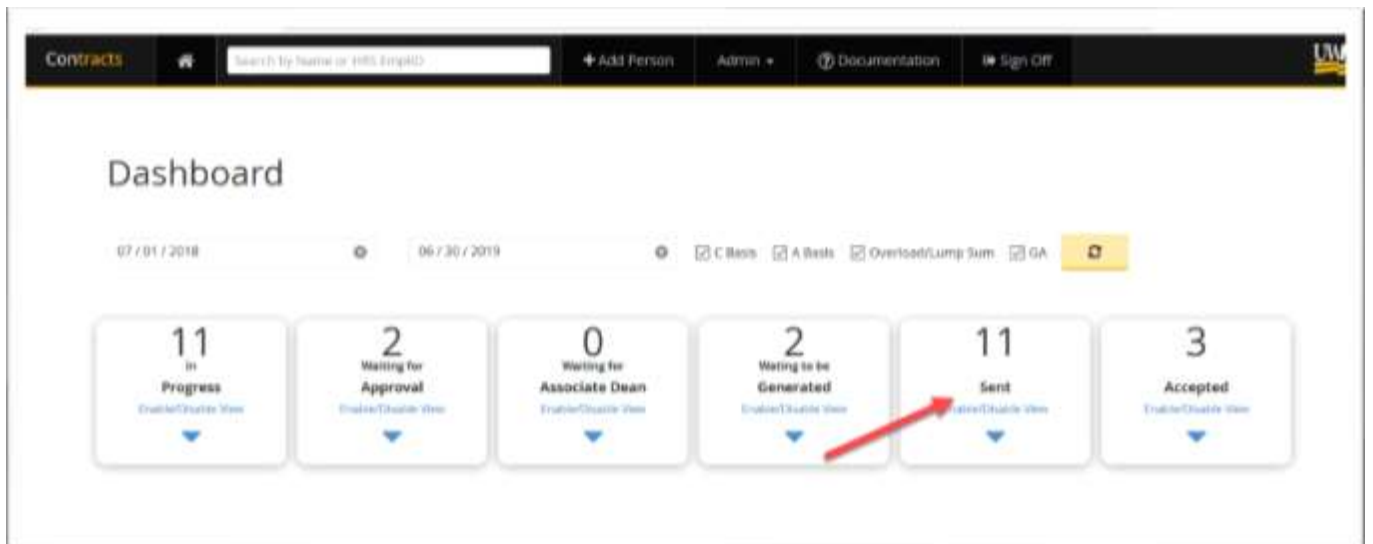| If…	Then…
The GA contract does not exceed the threshold	the contract will be automatically approved. On the dashboard, the contract is moved to the Waiting to Be Generated category. Proceed to the Generating a GA Contract section.
If the GA contract exceeds the threshold	an automatic notification will be sent to your Associate Dean requesting approval. On the dashboard, the contract will be moved to the Waiting for Associate Dean category. When you receive approval from the associate dean, proceed to the Generating a GA Contract section.

Generating a GA Contract
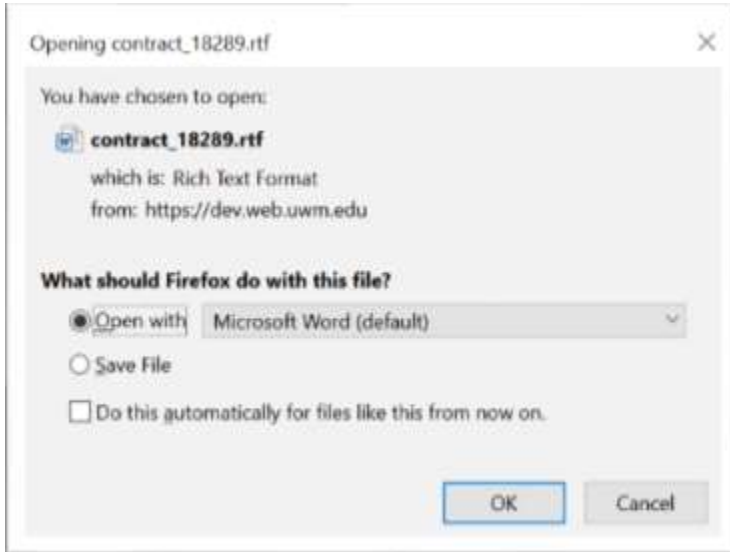
To generate a GA contract, do the following:

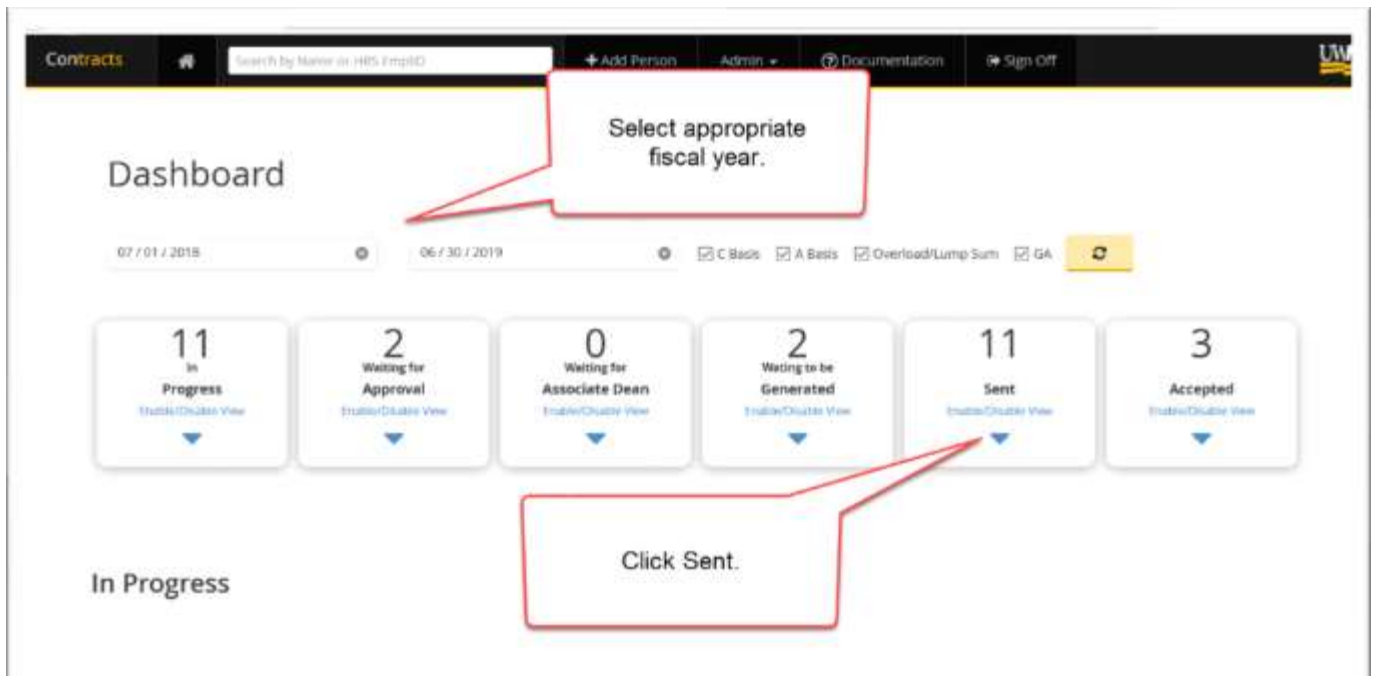1. Click the Generate button to the right of the contract.
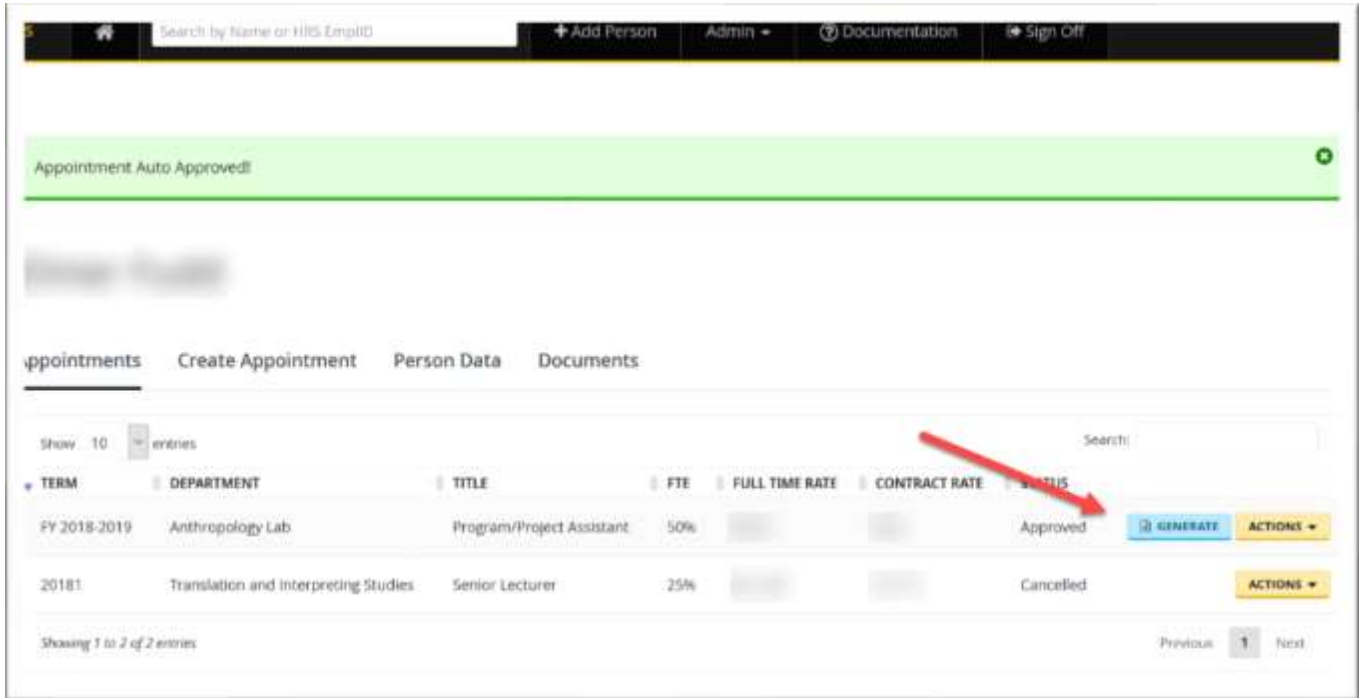
2. The contract file is generated, and the contract moves to the Sent category on the dashboard.

3. Save the contract file, and send it to the candidate.

4. When you receive the candidate's response to the contract, go to the dashboard.

5. Select the appropriate fiscal year, and click Sent.

6. Do one of the following:

- If the candidate accepted the contract, click the Acknowledge button. The contract is then moved to the Accepted category on the dashboard.

- If the candidate did not accept the contract, click Actions > Offer Declined. The declined offer is then moved to the Declined section at the bottom of the page.

Questions or Problems?

The L&S Contracts Application (and this manual!) are a work-in-progress – if you encounter problems while entering your appointments, or have questions about the workflow or the process itself, please let us know! Process-related questions can be addressed to L&S HR at **ls-contracts@uwm.edu**; technical issues or problems should be sent to L&S Web at **ls-web@uwm.edu**.