Faculty Additional Compensation eForm
User’s Guide

Provost Budget Office
http://wwwnew.towson.edu/provostpbo/
Revised February 2017
The Additional Compensation Faculty eForm is used to pay regular and contingent faculty (tenured, tenure track, clinical, visiting, lecturers, and adjunct) for non-teaching assignments that are in addition to their regular workload.

Only faculty members with an active job can use the Additional Compensation Faculty eForm.

The departments funding the additional compensation assignment should be the department initiating the Additional Compensation Faculty eForm.

The system will perform budget checks at the parent level for 502000 and 502200. Sufficient funds should be available prior to initiating an eForm.

All questions regarding the Additional Compensation Faculty eForm should be sent to PBO@towson.edu.

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Section 1: Initiators

Logging in to Gideon Taylor Additional Compensation Faculty eForm

1. From My TU, select PeopleSoft HCM under top links.

2. Login using TU NetID.
3. Click on Main Menu in the upper left corner of screen.

4. Select Additional Comp Faculty eForms.

5. Select Addl Comp Faculty Home Page.

Initiator’s Home Page

Additional Compensation Faculty Home Page

Create an Additional Compensation Faculty eForm
Click here to create one of the Additional Compensation Faculty family of eForms.

Update, Resubmit or Withdraw an Additional Compensation Faculty eForm
Click here to make changes to and resubmit an Additional Compensation Faculty eForm that has already been created, or to withdraw one.

View an Additional Compensation Faculty eForm
View a recently submitted Additional Compensation Faculty eForm, including information about its handling so far. Additional Compensation Faculty eForms submitted in the last month are listed here. This is a read-only view.
A. Initiate an Additional Compensation eForm

1. Select the create option from the Additional Compensation Faculty Home Page.

   Create an Additional Compensation Faculty eForm
   Click here to create one of the Additional Compensation Faculty family of eForms.

2. Select Addl Compensation Faculty eForm.

Start an Additional Compensation Faculty eForm

   Addl Compensation Faculty eForm
   The Additional Compensation Faculty eForm is a working template that can be copied to quickly create new eForm types. In its template form, it creates a new User ID.

   Addl Compensation Faculty eForm

Return to Additional Compensation Faculty Home Page
The eForm is automatically assigned the next available Contract ID number.
3. Enter appointee’s Empl ID or Click the search icon to search for the appointee by last and/or first name. Appointee must have a current faculty contract.

The appointee information is automatically populated when the Empl ID is entered.
**Contract Data (all fields are required)**

4. Enter Contract Amount.

5. Enter Contract Begin Date and Contract End Date.
   (Note: contract date cannot cross fiscal years)

6. Select Assignment Category from drop down menu.
   (Note: Do not select “Chair PBO Only” on the regular faculty eForm)

7. Enter detailed Assignment Description (field can accommodate 254 characters).

8. Enter estimated hours (Lecturers and Adjuncts only).
   (Note: This question does not appear on regular faculty eForm)

The Job Code and Account fields are auto populated or will be entered by Human Resources.
9. Enter Appointing Department and Funding Department (Use the look up to search for departments you can access). Enter grant number if assignment is grant funded (Do not use look up for grants. Search results will return all grants).
10. Select Payment Option from drop down menu.
   (Note: “Monthly” payments will be paid the second pay of the month)

   (Note: Pay Range Begin date must be equal to or later than the Contract Begin Date and equal
to or later than the current date. Pay range cannot cross fiscal years.)

Please refer to the Payroll Office’s Payroll Schedule when entering pay range dates.

https://www.towson.edu/financialservices/payroll/

“One Time Pay” option: using the payroll schedule, select the desired payroll number. Enter the Pay
Period End Date as the Pay Range End date on the eForm.
The system will automatically calculate the number of pays and each payment amount.

Budget Check Status

The system will check for available budget. Before entering an eForm, ensure there is sufficient budget. Budgets will be checked at the parent level for 502000 and 502200 account codes. If 502000 and/or 502200 is in deficit or 502000 is less than the contract amount, a budget error will occur.

If a budget check error occurs, follow the instructions in the popup message. If you submit a budget transfer, wait 24 hours before resubmitting the eForm. If a budget override is necessary and has been approved by the Provost Budget Office, the PBO will check the Budget Override box and the initiator will be notified via email.

Possible Budget Check Statuses are Not Checked, Valid or Error.
12. Add additional file attachment (if applicable)
   (Note: Contract PDF attachment with terms and conditions will be generated when the eForm is saved or submitted)
   a. Select Add File Attachment Button.
   b. Select Upload button.
   c. Select Browse button to find file. Click Upload Button.
   d. Enter File Description (required field).

13. Enter comments for additional notes if needed.
   Note: all approvers, except the appointee, will see the Comment History. However, appointees can add a comment.

14. Submit or Save eForm.
   Select Submit to send contract to the next approver.
   Select Save to put eForm on hold.
   Select Clear will clear the eForm data and assign the next available contract ID number.
Submit and save buttons will take you to the workflow screen.

The Process Visualizer section outlines the eForm workflow.

- Check mark indicates the eForm has been approved by that queue.
- Wavy arrow indicates an approval queue has been bypassed.
- Box indicates the eForm is in that approval queue.
- Shaded queues are the remaining approval queues in the workflow.

View This Form to go back to eForm to view Contract PDF file and next approver.

Return to return to the Additional Compensation Faculty Home Page.
View Contract PDF File and Next Approver in Create Mode

1. Select [View This Form] from Step 2 of 2: Form Finalized screen (previous page).

2. Select [View] under the File Attachments section to view the 2 page contract, which includes the contract terms and conditions.
   (Note: The Contract PDF file is generated when the eForm is saved or submitted. The Contract PDF files will be available in PeopleSoft for 3 years.)

3. Select [Next >>] to view Form History.
   (Select search button to return to the View an Addl CmpFac eForm screen.)
Form History

The Form History Screen shows the Transaction/Signature Log, which includes the date and time the action occurred, name of user, action taken and status of eForm.

4. Select [Who can work this form?] to view next approver.
The Current Form Worklist Items list the approvers in the current approval queue. Everyone in the approval queue will receive an email notification from HCMPRD@towson.edu. Only one person in the queue will evaluate/approve the eForm.

5. Select << Previous to return to eForm

(Select search button to return to View an Addl CmpFac eForm screen.)
B. Update a saved eForm, Resubmit a recycled eForm, or Withdraw an eForm

Initiators can make changes to an eForm only if the form has been recycled back to initiator’s queue. Do not make changes while the eForm is in the workflow.

1. From the Additional Compensation Faculty Home Page select the Update…option.

Additional Compensation Faculty Home Page

Create an Additional Compensation Faculty eForm
Click here to create one of the Additional Compensation Faculty family of eForms.

Update, Resubmit or Withdraw an Additional Compensation Faculty eForm
Click here to make changes to and resubmit an Additional Compensation Faculty eForm that has already been created, or to withdraw one.

View an Additional Compensation Faculty eForm
View a recently submitted Additional Compensation Faculty eForm, including information about its handling so far. Additional Compensation Faculty eForms submitted in the last month are listed here. This is a read-only view.

2. Enter search criteria(s) or Select button to view list of eForms.

Update a AddlCmpFac eForm
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

- Contract ID: begins with
- Workflow Form Status: =
- Empl ID: begins with
- Last Name: begins with
- First Name: begins with
- Department: begins with

Search | Clear | Basic Search | Save Search Criteria

Search Results

<table>
<thead>
<tr>
<th>Contract ID</th>
<th>Workflow Form Status</th>
<th>Empl ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Department</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>164</td>
<td>On Hold</td>
<td>0147426</td>
<td>Fake</td>
<td>Steven</td>
<td>T</td>
<td>13020</td>
<td>Education Tech Literacy EDTL</td>
</tr>
<tr>
<td>169</td>
<td>On Hold</td>
<td>0147346</td>
<td>Fake</td>
<td>Suzanne</td>
<td>Sanora</td>
<td>13020</td>
<td>Education Tech Literacy EDTL</td>
</tr>
<tr>
<td>174</td>
<td>On Hold</td>
<td>0147345</td>
<td>Fake</td>
<td>Suzanne</td>
<td>Sanora</td>
<td>13020</td>
<td>Education Tech Literacy EDTL</td>
</tr>
</tbody>
</table>

Note: search results can be sorted by clicking on any column heading.
3. Make changes to form data and resubmit eForm.

Select [Redact] to permanently end eForm from processing and archive the eForm.

Select [Redact] to send eForm to next approver with any changes made.

Select [Redact] to return to the [Redact] screen.

Select [Redact] to place eForm on hold.
Evaluators can Recycle, Deny, or Approve eForms.

Recycled contracts

Recycled contracts are routed back to the initiator for necessary changes. Only the initiator will receive an email notification from HCMPRD@towson.edu. Only the initiator can make changes to the eForm data. A resubmitted eForm will route through all the approval queues again.

Denied contracts

Denied contracts will be archived. Only the initiator will receive an email notification from HCMPRD@towson.edu.

Opt out of online acceptance

An appointee has the option to opt out of the online approval process. If an appointee opts out, the initiator will receive an email notification instructing the initiator to contact the appointee to initiate a paper contract. The workflow form status will reflect “Denied”.
Section 2: Evaluators

All evaluators will receive an auto generated email notification from HCMPRD@towson.edu when an Additional Compensation eForm enters their queue. Evaluators can access the eForm via the email notification or by logging into PeopleSoft (page 23).

Using the email notification:

1. Click on “Click Here” in the email.

2. Enter User ID and Password.

3. Review eForm data for accuracy.

To view contract terms and conditions select next to Contract PDF under the File Attachments section. (Note: Contract PDF files are available in PeopleSoft for 3 years.)

4. Select Recycle, Deny, Approve.

**Please provide directions in the Comments section that will help the initiator make acceptable changes**

Select to send the eForm back to the initiator for changes.

Select to permanently end eForm from processing. eForm will be archived.

**Please provide an explanation in the Comments section**

Select to send eForm to the next approver for evaluation.
Selecting recycle, deny, or approve will take you to the workflow screen.

The Process Visualizer section outlines the eForm workflow.

- Check mark indicates the eForm has been approved by that queue.
- Wavy arrow indicates an approval queue has been bypassed.
- Box indicates the eForm is in that approval queue.
- Shaded queues are the remaining approval queues in workflow.

Select **View This Form** to go back to eForm and to view next approver.

Select **Return** to return to the Additional Compensation Faculty Home Page.
View Next Approver

1. Select [View This Form] from Step 3 of 3: Form Finalized screen (previous page).

2. Select [Next >>] to view Form History.

   (Select search button to return to the Evaluate an AddlCmpFac eForm search screen.)
Form History

The Form History Screen shows the Transaction/Signature Log, which includes the date and time the action occurred, name of user, action taken and status of eForm.

3. Select **Who can work this form?** to view next approver.
   
   **(Note:** Everyone in the approval queue will receive an email notification from HCPRD@towson.edu)

Select **<< Previous** to return to the eForm

Select **<< Search** to return to the Evaluate an AddlCmpFac eForm screen.
**Evaluate eForm by Logging into PeopleSoft:**

1. **From My TU select PeopleSoft HCM under top links.**

   **My TU**

   - > TU Home
   - > My TU

   ![Login page]

   **Help With Login?**
   - If you have questions, contact the OTS Help Center at 410-TU-4151
   - Manage NetID/Account
   - Create a request for technology assistance (TechHelp)

   **Information for**
   - Current Students

   **Stay Informed**
   - Local Weather
   - TU Webcam
   - Emergency Closing Information
   - Campus Emergency Preparedness (login)

2. **Log in using TU NetID.**

   ![Secure Login]

   **Login**
   - NetID: [Enter NetID]
   - Password: [Enter Password]
   - Login

   Manage My NetID

4. **Click on Main Menu in the upper left corner of screen.**
5. Select Additional Comp Faculty eForms.

6. Select Addl Comp Faculty Home Page.

Evaluator’s Home Page

**Additional Compensation Faculty Home Page**

- **Evaluate an Additional Compensation Faculty eForm**
  Evaluate an Additional Compensation Faculty eForm to continue through the approval route

- **View an Additional Compensation Faculty eForm**
  View a recently submitted Additional Compensation Faculty eForm, including information about its handling so far. Additional Compensation Faculty eForms submitted in the last month are listed here. This is a read-only view.

7. Select the Evaluate...option to review and recycle, deny, or approve an Additional Compensation eForm.
Section 3: Appointees

Appointees will receive an auto generated email notification from HCMPRD@towson.edu when an Additional Compensation eForm enters their approval queue.

Appointees can access the eForm via the email notification (example email below) or by logging into PeopleSoft (page 30).

Using the email notification:

1. Click on “Click Here” in the email.
2. Enter User ID and Password.
3. Check “Agree to accept Online” and select

The appointee may opt out of the electronic process. However, the Provost Office strongly encourages online acceptance of Additional Compensation Faculty eForms. If the appointee does not agree to accept the contract in electronic form, the department must generate a paper contract and obtain the appropriate signatures. Please contact the department’s administrative assistant for assistance.

Evaluate a AddICmpFac eForm

Step 1 of 3: Appointee Online Acceptance

Please review the Contract data below and decide whether to Approve it or Deny it.

<table>
<thead>
<tr>
<th>Contract ID: 178</th>
<th>Employee Type: Lecturer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Empl ID: 0147345</td>
<td>Appointee Home Dept: 13020</td>
</tr>
<tr>
<td>Name: Suzanne S. Fake</td>
<td>Education Tech Literacy EDTL</td>
</tr>
<tr>
<td>Email: <a href="mailto:addicmp@gmail.com">addicmp@gmail.com</a></td>
<td>Phone: 410/704-2000</td>
</tr>
</tbody>
</table>

Please check the Agree to Accept Online box and click the Next button to review and accept your contract or check the Opt out Online acceptance box and contact your department to process your contract in paper form.

Online Contract Acceptance?

| Agree to accept Online | I agree to accept this contract in electronic form, in accordance with Maryland Uniform Electronic Transaction Act. |
| Opt out Online acceptance | I do not agree to accept this contract in electronic form. I have the right to enter into this agreement in paper form. |

Next >>
4. **Review eForm data for accuracy.**

To view contract terms and conditions select **View** next to Contract PDF under the File Attachments section.

5. **Select Deny or Approve.**

Select **Deny** to permanently end eForm from processing. eForm will be archived. Initiator will be notified.

**Please provide an explanation in the Comment section**

Select **Approve** to send eForm to the next approver for evaluation.
Selecting deny or approve will take you to the workflow screen.

The Process Visualizer section outlines the eForm workflow.

- Check mark indicates the eForm has been approved by that queue.
- Wavy arrow indicates an approval queue has been bypassed.
- Box indicates the eForm is in that approval queue.
- Shaded queues are the remaining approval queues in workflow.

View This Form to go back to eForm and to see next approver

Return to return to the Additional Compensation Faculty Home Page
6. Select View This Form from Step 3 of 3: Form Finalized screen (previous page).

7. Select Next to view Form History.

(Select search button to return to the Evaluate an AddICmpFac eForm search screen.)
Form History

The Form History Screen shows the Transaction/Signature Log, which includes the date and time the action occurred, name of user, action taken and status of eForm.

8. Select Who can work this form? to view next approver.
   *(Note: Everyone in the approval queue will receive an email notification from HCMPRD@towson.edu.)*

Select << Previous to return to eForm.

Select << Search to return to the Evaluate an AddlCmpFac eForm screen.
Appointee Evaluate eForm by Logging into PeopleSoft

1. From My TU select PeopleSoft HCM under top links.

My TU

3. Log in using TU NetID.

Secure Login
Faculty/Staff Entry to PS Human Capital Management

NetID: Password: Password
Login

8. Click on Main Menu in the upper left corner of screen.
9. Select Additional Comp Faculty eForms.

10. Select Addl Comp Faculty Home Page.

Appointee’s Home Page

Additional Compensation Faculty Home Page

Evaluate an Additional Compensation Faculty eForm
Evaluate an Additional Compensation Faculty eForm to continue through the approval route

View an Additional Compensation Faculty eForm
View a recently submitted Additional Compensation Faculty eForm, including information about its handling so far. Additional Compensation Faculty eForms submitted in the last month are listed here. This is a read-only view.

11. Select the Evaluate… option to review and deny or approve an Additional Compensation eForm.
Section 4: View an Additional Comp Faculty eForm from the Home Page

All users can view an eform from the Home Page.

1. Select View... option from the Home Page

Additional Compensation Faculty Home Page

View an Additional Compensation Faculty eForm
View a recently submitted Additional Compensation Faculty eForm, including information about its handling so far. Additional Compensation Faculty eForms submitted in the last month are listed here. This is a read-only view.

2. Enter search criteria(s) or select Search button to view list of eForms.

View a AddlCmpFac eForm

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

Search Results

Note: Search results can be sorted by clicking on any column heading.
Additional Comp Faculty eForm

View a AddlCmpFac eForm

Step 1 of 2: View AddlCmpFac Data

The information below was gathered on the eForm. Choose Next to see the eForm's history.

Appointee

Contract ID: 178  Employee Type: Lecturer
Empl ID: 0147345  Appointee Home Dept: 13020  Education Tech Literacy EDTL
Name: Suzanne S. Fake  Phone: 410/704-2000
Email: addlcmp@gmail.com

Contract Data

Contract Amount: 2500.00  Contract Begin Date: 09/01/2015  End Date: 12/31/2015  Fiscal Year: 2016
Assignment Category: Non Credit Teaching
Estimated hours per week over a 30 day period expected to work on this project: 3.00
Assignment Description
Non-credit Teaching for EDTL course
Appointing Department: 13020  Education Tech Literacy EDTL
Funding Department: 13020  Education Tech Literacy EDTL
Job Code: E4034  Educator, Non-Credit Courses
Payment Option: Monthly
Pay Range Begin: 10/01/2015  Pay Range End: 01/31/2016
Number of Pays: 4
Payment Amount: 525.00
Budget Check Status: Not Checked
Grant:
Account: 502419

Please press the View Button to review the Contract Terms and Conditions.

File Attachments

<table>
<thead>
<tr>
<th>1</th>
<th>Upload</th>
<th>View</th>
<th>Description</th>
<th>File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Scoring Sheet</td>
<td>Scoring_Sheet.xlsx</td>
</tr>
</tbody>
</table>

Comments

Your Comment: 

Comment History:

Ruth A. Hopkins  Wed Aug 06 15, 11:45:04 AM
New non-credit course

3. Select to view Form History.

(Select search button to return to the View an AddlCmpFac eForm screen.)
Section 5: Contract Cancellations/Adjustments

Contracts can be cancelled or adjusted by the Provost Budget Office only after an eForm has been “Executed” (approved by Payroll Office). Contract amounts can be reduced only. If a contract amount needs to be increased, another eForm should be submitted.

1. Complete the Additional Compensation Cancellation Form available on the PBO website.
2. Email the cancellation form to PBO@towson.edu
3. PBO will cancel or adjust the eForm in PeopleSoft.

Viewing a cancelled or adjusted eForm

If an eForm is cancelled, the WorkFlow Form Status will be “Cancelled” and “Pay Adjust” if the contract amount was reduced.

The contract cancellation/adjustment information is embedded in the eForm.
Section 6: Tools & Resources

Queries

From the PeopleSoft Main Menu

1. Select Reporting Tools > Query > Query Viewer

2. Enter TU_DEPT and click on Search

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Results

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Description</th>
<th>Owner Folder</th>
<th>Run to HTML</th>
<th>Run to Excel</th>
<th>Run to XML</th>
<th>Schedule</th>
<th>Add to Favorites</th>
</tr>
</thead>
<tbody>
<tr>
<td>TU_DEPT_ADMT_CONTACT_DATA Dept Addl Comp Contract Data</td>
<td>Public</td>
<td>HTML, Excel, XML, Schedule</td>
<td>Favorite</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Workflow Form Status

<table>
<thead>
<tr>
<th>Workflow Form Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorized</td>
<td>N/A</td>
</tr>
<tr>
<td>Denied</td>
<td>eForm has been denied and archived</td>
</tr>
<tr>
<td>Executed</td>
<td>eForm has been approved by the Payroll Office</td>
</tr>
<tr>
<td>Fully Cancelled</td>
<td>eForm has been fully cancelled by the PBO</td>
</tr>
<tr>
<td>In Error</td>
<td>N/A</td>
</tr>
<tr>
<td>On Hold</td>
<td>eForm has been saved by the initiator and is in initiator's queue</td>
</tr>
<tr>
<td>Partially Approved</td>
<td>eForm is in the approval workflow</td>
</tr>
<tr>
<td>Pay Adjusted</td>
<td>eForm contract amount has been reduced</td>
</tr>
<tr>
<td>Pending</td>
<td>eForm has been submitted by initiator and is pending department approval</td>
</tr>
<tr>
<td>Signed</td>
<td>N/A</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>eForm has been withdrawn and archived</td>
</tr>
</tbody>
</table>