OSP DOCUSIGN PROCEDURES

All forms requiring OSP approvals should be routed using DocuSign

It is the initiator's responsiblility to route to all parties for signaure, tracking and processing

Fiscal Manager assignments for OSP indexes: 429xxx and 4Wxxxx: FM Assignment

Tawnya Morgan (RED Budget Director) approves all F&A indexes 436xxx, 437xxx and 438xxx

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HUMAN RESOURCE FORMS

Typical HR forms requiring OSP and/or F&A funding approval and processed by HR:

(IPR) Incentive Program for Researchers

(ACF) Additional Compensation Form

(CFTR) Classified Fixed Term Request

(THAF) Temp. Hourly Non-Class Appt. Form

(PHAF) Professional Hourly Appointment

(LOA) Letter of Appointments - Tawnya Morgan (F&As) and Wanda McCarthy (OSP) point people

(RAF) Recruitment Authorization Form

(SEF) Student Employment Forms

(SAF) Salary Adjustment Form

(SSA) Summer Session Appointments

(ePAF) Electronic Personnel Action Form

Only F&A labor distributions in MyInfo require approval: Tawnya Morgan=approver, Jyll King=applier

Processed by OSP:

Payroll Correction Form

If any side of the transaction has an OSP OR an F&A index it will be processed in OSP.

1. Docusign envelope should include an approver line for the OSP Fiscal Manager/RED Budget Director

2. Copy to OSPFrontOffice@montana.edu for processing

UNIVERSITY BUSINESS SERVICES FORMS

Typical forms we see for approval *outside* of the BPA and Chrome River process:

(ACC) Fiscal Year Accruals

(HAF) Hospitality Approval Form

(TPB) Third Party Billing Authorization Form

Processed by OSP:

(FECF) Finance Expenditure Correction Form

If both sides of the transaction have an OSP OR an F&A index it will be processed in OSP.

1. DocuSign envelope should include an approval for OSP FM/RED Budget Director, > 90days, Subawards

2. Copy to OSPFrontOffice@montana.edu for OSP processing

3. Copy to financecorrections@montana.edu for Non-OSP processing

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PROCUREMENT Initiated

(CSA) Contracted Service Agreement - *FM initials off on funding, OSP Mgmt executes as Authorized Signer*

(Mod #x to CSA) Modifications to CSA's

(Purch Req) Purchase Requisition

OFFICE OF SPONSORED PROGRAMS

(FAF) OSP Tuition and Fee Authorization Form

*Approvals thru DocuSign then Dept uploads to Student Accounts folder

(AF) Traineeship and Appointment Form

*Approvals thru DocuSign with a copy to fellowships@montana.edu

OPAS Authority: Budget Transfer, No Cost Extension, Pre Award Requests

*Approvals thru DocuSign, FM follows up with PI & Dept.