How to Process Faculty Related Payments via Smartsheet

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By utilizing Smartsheet, contracts can be created with approval workflow included to 1) expedite processing allowing all stakeholders to work more efficiently and accurately with a more favorable outcome for the faculty member; 2) reduce errors in processing with multiple levels of review/approval; and 3) provides senior leadership appropriate information and oversight.

Tips for optimal service...
- To avoid delay in payment, users/submitters are responsible for following up on missing approvals.
- To avoid duplication of payments to faculty members, please do not send signed contracts to payroll if information is submitted via Smartsheet.
- To avoid overpayments for PATFA/AFUM who hold academic year appointments, include in the Smartsheet process ONLY contracts that are considered overload and/or above their regular workload.

Modification Timeline
- 10/08/21 - added Spring 2022 Term (new minimum credit hour rates for AY22 are not yet available)
- 09/22/21 - added a Confirmation notification after PATFA Faculty accept a Contract
  - Subject: Confirmation of Official Assignment for {{Term}} - {{CLASS_NBR}}
  - Body: Thank you for accepting your teaching contract. Here is your official assignment:
  - Term: {{Term}}
  - Class Description: {{ClassDescription}}
  - Total Salary: {{Total Amount}}
- 05/13/21 - added Fall 2021 Term (new minimum credit hour rates for AY22 are not yet available)
- Data Mesh replaced VLOOKUPs to other sheets (Service List, Term Data, CH Rates) to improve performance; this may slightly delay sending of approval requests.
- Archiving: Also to improve performance and to allow a more automated, sustainable system, contracts that were all paid (payroll end date), processed or cancelled more than 90 days in the past will automatically be moved to an Archived worksheet. This will remove them from your reports, dynamic views, etc. For example, a contract with a payroll end date of 5/31/21, processed 1/15/21 and not cancelled will be archived approximately 8/31/21.
- 03/19/21 - updated User Daily Report via Dynamic View to allow ability to export to csv format
- 03/19/21 - added Note to Faculty to approval requests.
- 03/12/21 - added Summer 2021 (2130) term
- 03/12/21 - added new field "Note to Faculty" that will be included in the approval request to faculty member

Effective May 15, 2020, all payments pertaining to course instruction must be paid via Smartsheet.

Training Resources

1. Overview
2. Create Contracts
3. Approvals
4. Revisions & Cancellations
5. Reporting

- UMS Academy Training Guide:
  - Once you are logged into your campus portal, you can find the training available in the on-line training venue of UMS Academy at this link: https://learnit.hoonuit.com/1009207/learnit?cn=umaine
- USM Training Materials
  - The recorded webinar from May 29, 2020 about the new Faculty Contract & Overload Processing process
  - The Working Guide tool covered in the training. You’ll see that the Working Guide tool has been updated somewhat from the training (minor) to include answers to questions you’d asked about the Smartsheets component during the training.
  - Introduction to Dashboard with Dynamic View - Manage Approvals
    - Webinar from September 9, 2020 introducing Dashboard & Dynamic View
  - Introduction to Dynamic View - Update Details (recording)
    - Webinar from October 13, 2020 introducing Dynamic View - Update Details
  - Introduction to Dashboard - User Daily Report; merging Comments tab; creating PDF via mail merge
    - Webinar from November 12, 2020
• 01/14/21 - to improve performance, functionality to capture the approval dates has been disabled even though the system is still saving the approval date behind the scenes. We may be able to provide this information at a later time.

• 01/14/21 - to improve performance, 2020 contracts already processed were removed; a copy was made to preserve historical records.

• 11/24/20 - updated Term field to include the Term Code in Campus Solutions because it seems that Winter Term could be linked to Fall (2110) or Spring (2120) terms. This will improve the lookup for Class Descriptions.

• 11/13/20 - powerpoint slides; merging Comments tab; creating PDF via mail merge (recording to meeting)
  • Dashboard 2020-11-13.pdf

• 11/11/20 - Updated Dashboard with revised dynamic "Daily Report"; added instructions below for creating PDF versions of the contracts for personnel files.

• 11/10/20 - Removed Cancellation Fee from contract form; use Cancellation Form instead.

• 11/09/20 - Added instructions below to incorporate Comments in your main sheet of your Daily Report

• 11/09/20 - Added field "Notes" to Form that User can utilize and will be shared with approvers but will not be shared with Faculty.

• 11/05/20 - to improve performance, archived Spring, May & Summer 2020 contracts Processed and Cancelled before 9/1/20

• 11/02/20 - added column for Pay Frequency (Biweekly or Monthly) and incorporated this information in the contract/agreement sent to faculty member along with a link to the payroll schedule.

• 10/13/20 - deployed Dynamic View - Update Details: powerpoint slides and recording

• 10/02/20 - added Spring 2021 term with the following interfaces set up:
  • Class Description lookup
  • New AFUM and NonRepresented credit hour rates
  • Updated Service Credits/Units List for PATFA

• 09/21/20 - changed HR Status from "Ready" to "Ready for Payroll"

• 09/20/20 - added ability to add multiple email addresses for User/Submitter to accommodate successive staff and backup coverage during leaves of absence.

• 09/17/20 - added extra field/info to Cancellation Form
  • Prorated Teaching Contract Pay Owed (to notify Payroll if a portion of the original contract should be paid)
  • Added Note near submission to submit a separate form to terminate employment, if appropriate.

• 09/15/20 - added Other Compensation earnings type

• 09/09/20 - webinar discussion and powerpoint; link to recording

• 09/09/20 - updated faculty email address to allow multiple faculty email addresses to be entered; separate by comma.

• 08/31/20 - added Graduate Assistant to Union indicator so payroll won't assume they are PATFA

• 08/27/20 - Form updated AYA Form field in Payment Details section

• 08/23/20 - added Law School to Union indicator so Law School payments can be submitted

• 08/20/20 - updated form field PATFA Academic Year Appointment to clarify to select first option for all AFUM payments.

• 08/19/20 - added "Alert" to Submitter when faculty accepts the contract

• 08/14/20 - removed class times from Agreements for web/online courses

• 08/11/20 - Faculty Hiring Workflow (revised 8/14/20)
  • MaineStreet Access to Student Data (Campus Solutions)

• 08/10/20 - duplicate approval requests resolved

• 08/10/20 - added class room, building, campus, meeting time and days to faculty contract.

• 08/06/20 - color-coded changes to the Smartsheet daily report to make it easier to manage submitted faculty contract...
• 08/04/20 - confirmed that minimum pay for PATFA should be determined by using the Service Credit balance earned at the beginning of each semester/term
• 07/27/20 - changed owner from aprilm@maine.edu to payr oli@maine.edu
• 06/27/20 - Reminders will be sent periodically to approvers /faculty members for contracts in Submitted status.

Related articles

• Forms
• How to Process Faculty Related Payments via Smartsheet - 4 Revisions and Cancellations
• Webinar Series and Training Opportunities
• How to Process Faculty Related Payments via Smartsheet - 3 Approvals
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