Office of the Vice President for Administration & Finance

ADMINISTRATION & FINANCE:

BUDGET OFFICE

Standard procedures for processing personnel/budget forms via Docusign:

IMPORTANT: For document(s) to be processed correctly, send document(s) without fields.

TEMPORARY APPOINTMENTS/ PART TIME FACULTY CONTRACTS/ SUMMER SESSIONS

Step 1: Create the document by scanning and uploading contract.

Step 2: Assign signing order of approval process:

1) Employee (Sign)
2) Department Head/Project Director (Sign)
3) Component Head - Provost Office (Sign)
   a. Henville Pole - Exec. Asst. to the Provost/Budget Director (Sign)
   b. Dr. Camille McKayle- Provost (Sign)
4) *Grant Accounting (if fund begins with #2)*
   a. Your assigned Grants Accountant (Sign)
5) Budget Office:
   a. Budgetdocs@uvi.edu - LeShawn Ottley - Budget Analyst (Sign)
   b. Dgreena@uvi.edu - Delicia G. Henley - Budget Manager (Sign)
6) Human Resources- Ron Meek – HR Director (Sign) on Temp Appt.

STUDENT RECORDS OF APPOINTMENTS (SROA)

Step 1: Create the document by scanning and uploading contract.

Step 2: Assign signing order of approval process:

1) Department Head/Project Director (Sign)
2) Component Head - Provost Office (Sign)
   a. Henville Pole - Exec. Asst. to the Provost/Budget Director (Sign)
   b. Dr. Camille McKayle- Provost (Sign)
3) *Grant Accounting **(if fund begins with #2)***
   a. Your assigned Grants Accountant (Sign)
   b. Route to Student Employment Office (Receives a copy)
      i. STT-Mary Myers or
      ii. STX-Anyha Lord-Jerris
4) Budget Office (if fund begins with #1)
   a. Budgetdocs@uvi.edu - LeShawn Ottley - Budget Analyst (Sign)
   b. Dgreena@uvi.edu - Delicia G. Henley - Budget Manager (Sign)
   c. Route to Student Employment Office (Receives a copy)
      i. STT/Mary Myers or
      ii. STX/Anyha Lord-Jerris

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<u>**FACULTY OVERLOADS**</u> - (Preapproved by Provost Office)

Step 1: Create the document by scanning and uploading contract.

Step 2: Assign signing order of approval process:

1) Employee (Sign)
2) Division Chair/Dean (Sign)
3) *Grant Accounting (if fund begins with #2)*
   a. Your assigned Grant Accountant (Sign)
4) Budget Office:
   a. Budgetdocs@uvi.edu - LeShawn Ottley - Budget Analyst (Sign)
   b. Dgreena@uvi.edu - Delicia G. Henley - Budget Manager (Sign)
5) Human Resources- (Receives a copy)

<u>**BUDGET CHANGE REQUEST (BCR) FORMS**</u>

Step 1: Create the document by scanning and uploading.

Step 2: Assign signing order of approval process:

1) Department Head (Sign)
2) Component Head (Sign)
3) Budget Office:
   a. Budgetdocs@uvi.edu - LeShawn Ottley - Budget Analyst (Sign)
   b. Dgreena@uvi.edu - Delicia G. Henley - Budget Manager (Sign)

<u>**CHANGE IN ACCOUNTS (CIA) FORMS**</u>

Step 1: Create the document by scanning and uploading contract.

Step 2: Assign signing order of approval process:

1) Department Head (Sign)
2) Component Head (Sign)
3) *Grant Accounting (if fund begins with #2)*
   a. Your assigned Grant Accountant (Sign)
4) Budget Office:
   a. Budgetdocs@uvi.edu - LeShawn Ottley - Budget Analyst (Sign)
   b. Dgreena@uvi.edu - Delicia G. Henley - Budget Manager (Sign)
5) Human Resources- (Receives a copy)

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<u>CHANGE IN STATUS (CIS) FORMS</u>

Step 1: Create the document by scanning and uploading.

Step 2: Assign signing order of approval process:

1) Department Head (Sign)
2) Component Head (Sign)
3) Human Resources – Ron Meek (Sign)
4) *Grant Accounting (if fund begins with #2)*
   a. Your assigned Grant Accountant (Sign)
5) Budget Office:
   a. Budgetdocs@uvi.edu - LeShawn Ottley - Budget Analyst (Sign)
   b. Dgreena@uvi.edu - Delicia G. Henley - Budget Manager (Sign)
6) Human Resources- (Receives a copy)

PLEASE NOTE: This is just a standard procedural document. However, if your department or component has specific instructions or procedures in the processing of these documents please follow those processes in accordance with these guidelines.

August 2021