SUBMITTING OPS STAFF/STUDENT EFFORT RECAPS TO HUMAN RESOURCES VIA DOCUSIGN

Completing Recaps

All recaps must have the required information completed on them in order for HR to process. This information can be easily obtained via **Information Navigator report, OHR000011, Employee Summary**. Please use this report to complete the Name, UWF ID, Position Number, Department Name, Department Orgn Number and Pay Index Number. Recaps should include all hours worked during the pay period. The pay period dates can be found by viewing the current Payroll Calendar on the [Controller's Office, Payroll Department webpage](). When you input the "From" date on the recap, the remainder of the pay period dates will automatically populate for you.

DocuSign Access

In order to be able to send documents through DocuSign you must take the DocuSign Sender training which is available through SCOOP and be set up as a Sender by ITS. Please refer to the "Obtaining DocuSign Sender Certification" process in Confluence.

Starting an Envelope

Log into DocuSign through the DocuSign app in MyUWF.

To complete and route the recap for signature via DocuSign, you will start an envelope in either of the following ways:

1. From the Home page, click the yellow **NEW** button and select **Send an Envelope**.
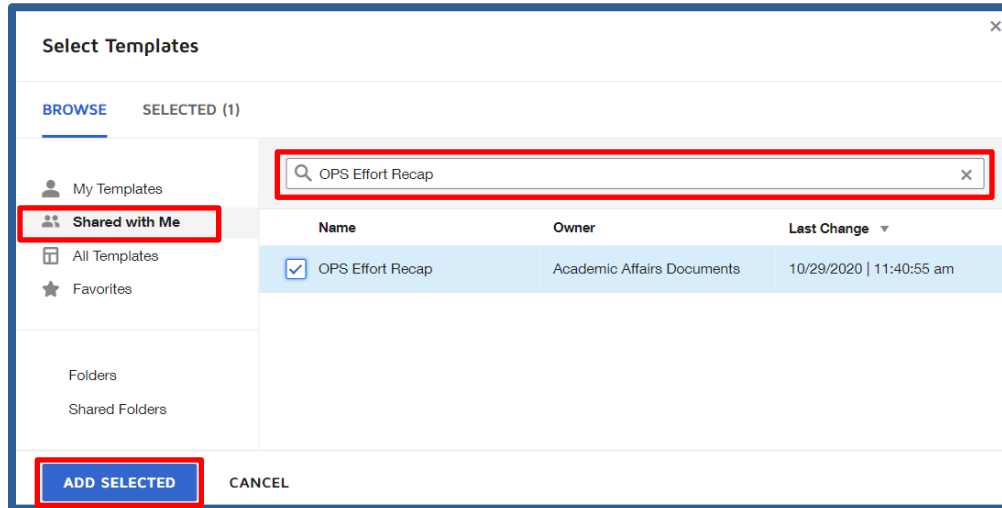   a. On the next page, click **Use a Template**.
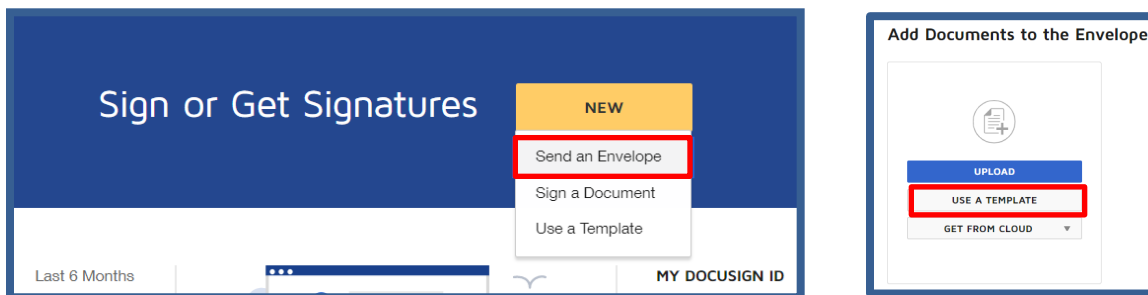
2. From the Manage page, click the yellow **NEW** button and select **Send an Envelope**.
   a. On the next page, click **Use a Template**.
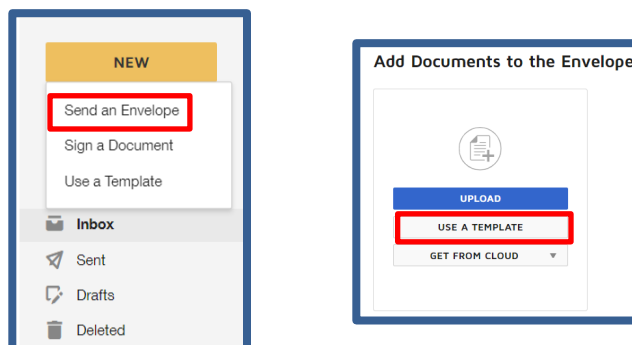
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The Select Template view appears:

In the **Select Template** dialog, navigate to the Shared with Me area and select the "**OPS Effort Recap**" and click the blue **ADD SELECTED** button.

Your templates and the templates shared with you are available to search and select. You may also Favorite your templates so that they appear in one convenient place for future use.

Adding Recipients

1. From the Prepare view, enter the name and email addresses of the recipients. For the case of an Effort Recap, the Initiator is the first recipient.
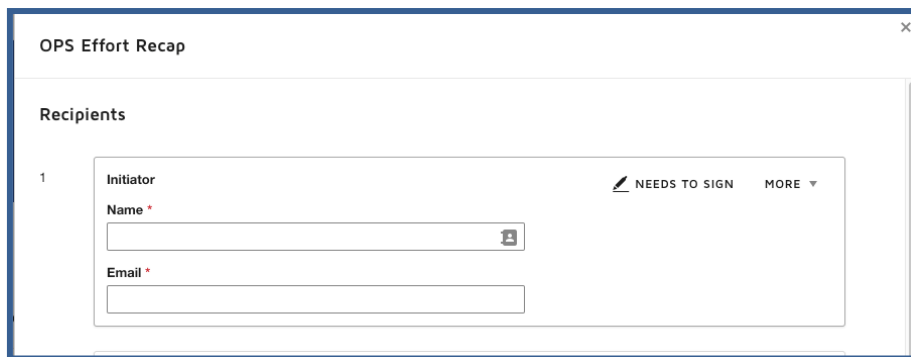
2. Next, add the employee as the second recipient. It is important that you select the official UWF employee email (not alias). To do this select the employee utilizing the auto complete function or check the UWF campus directory. Then, add the supervisor as the third recipient of the envelope.

3. The **hrrecords@uwf.edu (Signing Group)** and **payroll@uwf.edu (Signing Group)** are the final recipients of the envelope and have been built into the signing order of the template and cannot be edited or removed.

4. The Email Subject will default to "Please DocuSign: OPS Effort Recap". You should leave that part of the subject as is, but should add additional information after it, such as the employee's name. For example, "Please DocuSign: OPS Effort Recap for Jane Doe". The maximum length of the subject is 100 characters, so you have an additional 67 characters beyond the default subject. Once you have filled out all necessary signers and set the Email Subject, if you wish to leave a message to the employee, complete the **Email Message** field with any further required information.

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5. Click the **SEND NOW** button to advance and add fields to the document.

A box will appear asking, "Do you want to sign this document now?". Click on the blue **SIGN NOW** button.

Completing the Effort Recap Header

As the Initiator of the Effort Recap, you will be completing the top portion of the form with the Pay Period Dates (found on the [Controller's Office, Payroll Department Webpage](#)), Employee's Name, UWF ID, Position Number, Department Name, Department Orgn Number (also known as Home Orgn Number) and Pay Index Number. This information can be easily obtained via **Information Navigator report, OHR000011, Employee Summary**.
Complete all fields as required and click the green **FINISH** button. The Effort Recap will route automatically to the employee to complete the hours physically worked during the pay period. All signature and date fields will be automatically inserted in the appropriate places on the Effort Recap.

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Completed Effort Recap

Once the Effort Recap has routed to the employee for completion, the supervisor will receive the form to review and sign for approval. At that time, it will route to Human Resources for review of all data for accuracy and processing. Human Resources will sign, attach any additional documentation which may be required by the Controller's Payroll Office, make comments, and sign for completion. The Effort Recap will then route as a completed copy to Payroll for final processing. Receipt in Human Resources does not mean that the Effort Recap will be immediately processed for payment. Effort Recaps must be received by the bi-weekly payroll deadline as listed on the Payroll Calendar on the [Controller's Office, Payroll Department Webpage](#) in order to be processed for payment in the current period. Recaps received after the current bi-weekly deadline will be processed for payment in the following payroll cycle.

An example of a successfully completed Effort Recap routed through DocuSign follows.

Special Cases

If an employee has left UWF and is no longer available to sign an Effort Recap, please contact hr@uwf.edu for further instructions.

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The University of West Florida
OPS STAFF/STUDENT EFFORT RECAP

Pay Period:	14	From:	06/14/2020	To:	6/27/2020		
Last Name:	Jernigan	First Name:	Sheri	UWF ID:	970001234	Position #:	974000-00
Department Name:		Human Resources		Pay Index Number:		1450	
Department Orgn Number:		1450		Pay Index for Overtime:			

The OPS Effort Recap should be completed for ALL hours worked during the entire two week pay period, not just for corrections.
An Effort Recap is a replacement to anything previously submitted online in the Web Time Entry system.

Day	Date	Regular Hours	Overtime Hours	(Please provide all information requested at the top of this form before sending to Human Resources)
		Enter Minutes as: 15 min = .25, 30 min = .50, 45 min = .75		
Sunday	6/14/2020	0	0	
Monday	6/15/2020	8	0	
Tuesday	6/16/2020	8	0	
Wednesday	6/17/2020	8	0	
Thursday	6/18/2020	8	0	
Friday	6/19/2020	8	0	
Saturday	6/20/2020	0	0	
		40.00	0.00	Total - Week 1

Day	Date	Regular Hours	Overtime Hours	
		Enter Minutes as: 15 min = .25, 30 min = .50, 45 min = .75		
Sunday	6/21/2020	0	0	
Monday	6/22/2020	8	0	
Tuesday	6/23/2020	8	0	
Wednesday	6/24/2020	8	0	
Thursday	6/25/2020	8	0	
Friday	6/26/2020	8	0	
Saturday	6/27/2020	0	0	
		40.00	0.00	Total - Week 2
			80.00	Total hours for pay period

07/14/2020	Sheri Jernigan		*Sheri Jernigan*
Date	Employee Name (Printed)		Employee Signature
07/14/2020	Christine Dillard		*Christine Dillard*
Date	Supervisor Name (Printed)		Supervisor Signature

HR USE ONLY:	HR COMMENTS:	
New X	This is an example of a completed Effort Recap via DocuSign.	
Correction	Date: 07/14/2020	HR Signature: *Nicole Zamary*