Get the FACS:

Faculty Automated Contract System

Faculty Automated Contract System (FACS)

Introduction

The Faculty Automated Contract System (FACS) is an automated contract processing system designed to generate, approve, process, and manage Adjunct, Offload, and Per Student payments and contracts. The complete system uses PeopleSoft for data entry, validation, and data management; and Perceptive Content for workflow approvals and document management. FACS can be accessed through PeopleSoft HCM via My TU web page. Departmental users can view and print processed contracts from Perceptive Content. This manual is divided into the following sections:

Section 1: Contract Types

Adjunct Contracts

Adjunct Contracts are used to compensate faculty who teach on an as-needed basis. Adjunct Faculty are paid on a per course basis at a rate established by the institution. There are three categories of Adjunct Faculty: Adjunct I, Adjunct II, and Adjunct III. All first-time teaching adjunct faculty are Adjunct I faculty. Each college is responsible for establishing criteria and evaluating Adjunct Faculty I for advancement to Adjunct II and Adjunct Faculty II for advancement to Adjunct III status. Moreover, an individual could be an Adjunct I in one department, but may have attained Adjunct II status in another department. In this case, the Adjunct II status applies to all contracts. It is the contract initiator's responsibility to select the correct contract type from the menu selection.

Offload Contracts

An Offload Contract is used to compensate regular faculty and Lecturers for teaching a course beyond their standard instructional workload. The compensation rate is the same as the Adjunct I, II, or III rate (depending on years of service). Please consult with your Chair to determine adjunct rank.

Per Student and Tuition-Only Contracts

Per Student courses include the following: Directed Reading, Independent Study, DISP, Internship, Practicum, Clinical, Travel Study, Student Teaching, Special Project, Graduate Project, Thesis/Dissertation and Capstone courses.

Per Student Compensation Contracts must be submitted after the Change of Schedule (drop/add) period ends and before the last day of classes for the session.

Please refer to the Provost's Budget Office website for the latest pay scale for per student compensation contracts. It is the responsibility of the department to use the correct rate and accurately calculate the payment due to the appointee.

Minimester and Summer Contracts

Faculty teaching classes with multiple HEGIS/subject codes or section numbers will be compensated for a single course; and all sections should be listed on the same contract.

Linked or mixed undergraduate-graduate courses (e.g., 300/500) are treated as a single class. Only one course should be entered in the Course Teaching Assignments section. The other linked or mixed course(s) should be listed in the Dept. Note field. Compensation for linked courses is calculated at the undergraduate pay rate up to the single course maximum.

Minimester and summer compensation amounts are entered by the Provost's Budget Office. Compensation is calculated on a per student, per credit hour basis. Enrollment counts to determine compensation are compiled after 5pm on the last day of the add/drop period.

Funding department for minimester contracts is 31300.

Funding department for summer contracts is 31210.

Exceptions apply to Ner Israel, Study Abroad & Away, and grant funded courses.

Please refer to the Provost's Budget Office website for minimester and summer policies and procedures.

Special Minimester and Special Summer Contracts

Special minimester and special summer contracts are used for Ner Israel, Study Abroad & Away, AIT, SPPA, ACSD, OCTH, IHSM, PAST and grant funded courses.

Special minimester and special summer compensation FACS course amounts are entered by the department initiator.

Course Load Limitations for Fall and Spring Semesters:

COURSE LOAD LIMITATIONS	
Rank/Title	**Limitation**
Regular Faculty/Lecturer	May teach one off-load course with Chair and Dean approval
Adjunct not otherwise employed; or employed less than full-time	May teach a maximum of 3 courses per semester. Exceptions (one additional course) must be approved by the Chair and Dean.
Adjunct who is employed full-time	May teach one course per semester. Exceptions (one additional course) must be approved by the Chair and Dean.
Adjunct who is employed full-time and teaches part-time at another institution	Ineligible to teach at Towson University. Requests for exceptions are strongly discouraged.

All Staff who teach courses, or accept other Secondary Assignments, must use leave if the assignment coincides or overlaps with the employee's regular work hours as stated in the University Policy on Secondary Employment for Regular Non-Faculty Employees.

Regular Faculty Course Load Limitations for Minimester:

- Faculty may teach no more than one three (3) credit class, or an equivalent combination of classes totaling no more than three (3) credits, during January minimester.

- Additional classes and/or credits may be possible in exceptional cases but must be approved by the department chair, college dean, and provost.

Regular Faculty Course Load Limitations for Summer:

- Based on a standard maximum teaching load of four course units during an academic semester (15 weeks), the standard maximum teaching load during the summer (10 weeks) is three course units. Upon recommendation of the Chair and approval of the Dean, a fourth course unit may be approved for the summer.

- This teaching load would normally consist of no more than:

  - Two course units in one 5-week or one 7-week summer session
  - Three course units occurring simultaneously unless two or more were in the 10 week session

Section 2: Initiating a Contract

Steps to completing a contract in FACS:

1. **Department contract initiator navigates to Contract Data Entry page and presses ADD button**

| Favorites ▼ | Main Menu ▼ | > | Towson Mods ▼ | > | FACS ▼ | > | FACS Contract Data Entry |

Add FACS Contract Data

Add a New Value

Add

2. **Initiator enters contract data.**

| Favorites ▼ | Main Menu ▼ | > | Towson Mods ▼ | > | FACS ▼ | > | FACS Contract Data Entry |

FACS Contract Data

*Empl ID: [   ] 🔍   *Appointing Dept: [   ] 🔍

Contract ID: 0   Employee Type:

*Contract Type: [▼]   *Term: [   ] 🔍   *Session: [   ] 🔍

Job Code: Account:

Funding Dept: [   ] 🔍   Grant: [   ] 🔍

For replacement appointees, check "Late Start" box
and update Contract Begin Date.

Name:

Address: Late Start: ☐   Contract Begin Date:

City: State: Zip: Contract End Date:

Phone: Email:

Course Teaching Assignments   Personalize | Find | View All | 🗗 | 🖩   First ◀ 1 of 1 ▶ Last

	Course Search	Term	Session	Subject	Number	Section	Title	Credit Hrs	Contact Hrs	Course Amount	
1	[ ] 🔍							[ ]	[ ]	[ ]	➕ ➖

Total Contract Amount: $

Dept Note: [   ]

Contract Status: Date:

💾 Save   🖳 Add

Notes:

a. The appointee must have an Empl ID and "@towson.edu" email address.
b. The Appointing Dept is the Initiator's department.
c. Contract Types:

   <u>**Dept Funded**</u> – contracts that are funded by a self-support department or by a grant. Self-support departments begin with a "3". Grants begin with a "5".
   <u>**State Funded**</u> – contracts that are funded by a stateside department. Stateside departments begin with a "1".

   i. Adjunct 1 Dept Funded
   ii. Adjunct 1 State Funded
   iii. Adjunct 2 Dept Funded
   iv. Adjunct 2 State Funded
   v. Adjunct 3 Dept Funded
   vi. Adjunct 3 State Funded
   vii. Offload Dept Funded
   viii. Offload State Funded
   ix. Per Student Dept Funded
   x. Per Student State Funded
   xi. Minimester
   xii. Special Minimester
   xiii. Summer
   xiv. Special Summer

d. The Term and Session fields are required (*for summer course dates that do not fall within the 5, 7, or 10 week sessions, select regular*).
e. Funding Dept is the funding source.
f. Grant number must be a valid number. Please note that a contract cannot contain both a Funding Dept and a Grant.
g. Check Late Start box only if contract is replacing a faculty member after the start of the semester. Click on the calendar icon to change the Contract Begin Date.
g. Course Search – Please enter as much information as possible in the search dialog box in order to limit the number of possible choices.
h. Enter credit hours and contact hours (*for FACS purposes, "contact hours" are the official additional lab hours a faculty member is required to perform in the delivery of specific instruction*).
i. Enter the course amount (*except for regular minimester and summer contracts*).
j. If another course is needed, click the "+" to add a row. One contract can accommodate up to three courses. If more than three courses are needed, a second contract must be completed.
k. After all information is entered, click "Save".
l. The system will assign a Contract ID and update the Contract Status field.
m. Click "Add" to enter another contract.

Example:

Notes:

- You may click the "Add" button at the bottom of the screen to add the next contract even if the next contract is for a different appointee.

- If multiple courses are entered on one contract, all courses must be in the same session and funded by the same department number.

- Per Student Contracts for a course with more than one student should be entered on one line. Do not enter the same course on multiple lines. Calculate the total payment and enter the amount on one line. If credit hours vary for multiple students, enter 3 credit hours and enter an explanation in the Dept Notes field.

- Semesters remain active for 30 days after the end of the semester. If a payment is needed after the 30 days, please contact the Provost Budget Office for a paper contract.

- Credit hours for team-taught courses should not be adjusted. Please use the Dept Notes field to explain the split.

Section 3: Appointee Approval

All appointees will receive a system generated email from HCMPRD@towson.edu as a courtesy notification.

The appointee receives the following e-mail:

Welcome to the Faculty Automated Contract System (FACS). You will need your Towson University NET ID and password to access the system.

Please follow these steps to view and accept your contract(s). Multiple contracts may be issued to accommodate all of your teaching assignments:

- Answer the questions presented on the initial page and click the Save button.
- Click the OK button to continue.
- Click the View/Accept link(s) to see the contract(s) in the Unaccepted Contracts box.
- Read your contract and place your initials in the box at the bottom of the contract.
- Click the Accept button.
- Click the OK button to continue.
- Click the Printable Version link(s) in the Accepted Contracts box to save or print a copy of your contract.

Please click here to begin.

If you need assistance, please contact your department.

1. **Log into the system to accept the contract.**

      The Appointee can either click the link in the email or log into PeopleSoft HCM to navigate directly to the screen. Therefore, appointees do not have to wait for the email to accept their contract(s).

Navigation: Towson Mods→FACS→Contract Acceptance

2. Answer contract questions.

3. Click OK to continue.

4. Click View/Accept Contract link.

Favorites | Main Menu > Towson Mods > FACS > Contract Acceptance

Minnie Mouse
ID: 0400986

Click the link(s) in the Unaccepted Contracts box and follow the instructions to read and accept your contract(s).

Unaccepted Contracts					
Contract ID	**Term**		**Department**		
100192	1124	Fall 2012	12020	Accounting	View/Accept Contract

There are no accepted contracts to view.

5. Electronically sign the contract.

On the last page of the contract the Appointee enters initials and accepts the contract. If desired, the Appointee can reject the contract.

7. ONLINE ACCEPTANCE

I agree to accept this contract in electronic form, in accordance with the Maryland Uniform Electronic Transactions Act. I confirm that I can access, read and print on paper this electronic agreement. I understand that I have the right to refuse to enter into future agreements in electronic form.

ACCEPTANCE
I accept and I agree to the terms of the contract and have provided all necessary information.

To accept, enter your initials and click the Accept button. To reject, click the Reject button.

_____   _____
Appointee   Date

Accept   Reject

6. Click OK to complete the approval process.

Favorites | Main Menu > Towson Mods > FACS > Contract Acceptance

Minnie Mouse

Contract Accepted

Contract ID: 100192

✔   Your contract has been accepted. Thank you.

OK

7. Print a PDF version of the contract.

After the Appointee accepts the contract, the contract status changes and the appointee can print the PDF version of the contract by clicking on the Printable Version link.

Favorites | Main Menu > Towson Mods > FACS > Contract Acceptance

Minnie Mouse
ID: 0400986

There are no contracts to accept.

Click the link(s) in the Accepted Contracts box to save or print a copy for your records.

Accepted Contracts

Contract ID	Term		Department		
100192	1124	Fall 2012	12020	Accounting	Printable Version

Section 4: Opting Out

Appointees may "opt out" of the electronic acceptance process; however, the PBO strongly encourages online approval. If the Appointee chooses to opt out, a paper contract, which the Appointee, Chair, and Dean must sign, will be generated. Please contact your department's administrative assistant for assistance.

Step 1: The Initiator creates a contract as indicated in Section 2 of this manual.

➢ **To Opt Out, the Appointee selects the appropriate choice:**

Mickey Mouse
ID: 0123456

Please answer the following:

ONLINE ACCEPTANCE

    ○ I agree to accept this contract in electronic form, in accordance with Maryland Uniform Electronic Transactions Act.

    ○ I do not agree to accept this contract in electronic form. I have the right to enter into this agreement in paper form.

➢ **The Appointee receives the following message:**

Mickey Mouse

You did not agree to accept your contract online. Please contact your department to obtain a paper contract. Click on Signout to logoff.

Step 2: The Initiator changes the contract status on the FACS Contract Data Update Page to Opted Out Paper Contract.

Step 3: The Initiator uses the FACS Contract Print menu item to navigate to the desired contract.

Navigation: Towson Mods→FACS→FACS Contract Print

Department: 12350   Music

Contracts				Find First ◄ 1-12 of 12 ► Last
Contract ID	Empl ID	Name	Term	Opt Out
100009	0123456	Mickey Mouse	1124 Fall 2012	☑ Print/View Contract

➢ Be sure to check the <mark>Opt Out Box</mark> so that the proper contract format is printed (i.e. the contract will print with actual signature lines and questions for the Appointee to answer).

➢ Click Print/View Contract

➢ Print and deliver the contract to the Appointee. The Appointee must answer the questions.

The next page shows an example of the Opt Out contract question and signature page.

5. CITIZENSHIP

_____ I am a US Citizen or permanent resident alien.

_____ I am not a US Citizen or permanent resident alien and I have contacted the NRA Tax Office.

ACCEPTANCE

I accept and I agree to the terms of the contract and have provided all necessary information.

_____   _____
Faculty Member   Date

_____   _____
Department Chairperson   Date

_____   _____
Dean of College   Date

Please complete the following:

OTHER EMPLOYMENT

Please check one:
_____ I work at a State of Maryland Department, Agency, or Institution other than Towson University.
_____ I am employed at a State of Maryland Department, Agency or Institution. (Please provide the name of your employer.)

Employed with _____

EDUCATION

Highest Education Level: _____   Year Graduated: _____

Institution: _____   Major: _____

Step 4: The Initiator enters the appointee's answers to the questions in FACS.

Navigation: Towson Mods→FACS→FACS Employee Data

Favorites | Main Menu > Towson Mods > FACS > FACS Employee Data

FACS Employee Data

Empl ID: 0123456   Mickey Mouse

Faculty Employee Data   Find | View All   First ◀ 1 of 1 ▶ Last

Effective Date: 06/06/2012

Accepts Contracts Online (Y/N): N   Citizen/Permanent Resident (Y/N): Y

Other Employment

Appointee works at a State of Maryland Department, Agency, or Institution other than Towson University (Y/N): N

Employee With:

Education

Highest Degree: Master's ▾   Major: Music Performance
Year Graduated (YYYY): 2010   Institution: Peabody Institute

Last Updated By MMOUSE1   Date/Time 06/06/12 12:18:56PM

🖫 Save   🔍 Return to Search   🖫 Add   Update/Display   ⚖ Include History   📝 Correct History

## Step 5: The Initiator obtains all necessary approvals and delivers the contract to the PBO.

Opt Out contracts bypass Chair and Dean queues and move directly to the PBO queue. Once the PBO receives the paper contract, the PBO will match the paper document to the electronic version in FACS and move the electronic version to OHR. The paper document will be scanned into Perceptive Content for permanent storage.

Section 5: Chair and Dean Approvals

Department Chairs and College Deans use Perceptive Content to approve or reject contracts.

1. Log into Perceptive Content.
2. Navigate to the Workflow section.
3. Select the appropriate queue.
4. Open the desired contract.
5. Select the "Route Forward" icon to either Accept (Approved Send to...) or Reject (Return to department).

If the contract is rejected, the department Initiator receives a system-generated email alert. The Initiator is responsible to take any necessary actions, including notifying the Appointee.

Route Forward Button
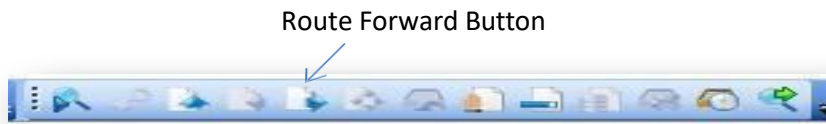
Bulk Approvals

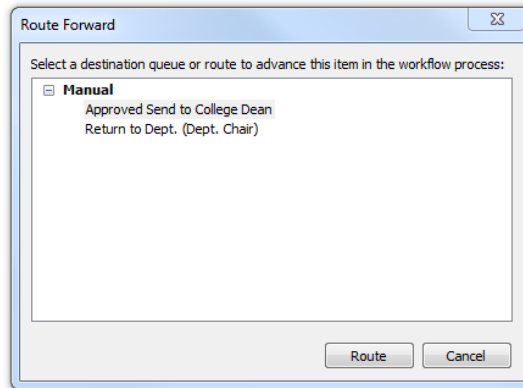The Chair and Dean can also approve or reject contracts in bulk.

1. In PeopleSoft HCM, navigate to

2. Run query TU_FACS_CHAIR(or DEAN)_CNTRCT_TERM_STAT to list contracts pending Chair or Dean Approval *(Query includes all contract information)*.
3. Match the query to the Perceptive Content queue.
4. Highlight the rows in Perceptive Content.
5. Select the Route Forward button (see next page)

Bulk approval in Perceptive Content

Time In Queue	TU ID:	Name:	Contract #:	Dept. #:	Grant:	Drawer
4 hours 56 min...	0400986	Mouse,Minnie	100192	12020	N	FACS_Contract
4 hours 56 min...	0400986	Mouse,Minnie	100193	12020	N	FACS_Contract
4 hours 56 min...	0400986	Mouse,Minnie	100194	12020	N	FACS_Contract
4 hours 56 min...	0400986	Mouse,Minnie	100196	12020	N	FACS_Contract

Route Forward

Select a destination queue or route to advance this item in the workflow process:

⊟ **Manual**
    Approved Send to College Dean
    Return to Dept. (Dept. Chair)

Route   Cancel

Section 6: Provost Budget Office (PBO) Approval

The PBO reviews contracts for accuracy and can reject and cancel contracts. Once the contract is approved by the PBO, the contract is sent to the Office of Human Resources (OHR) and then to the Payroll Office. The PBO also maintains the list of authorized system users and their roles.

The PBO screen showing the "PBO Approval Pending" status is shown below:

If a contract is rejected by the PBO:

1. The initiator will receive a system generated e-mail
2. The initiator will receive an e-mail from the PBO stating the reason
3. The initiator must submit a new contract with the correct information

Section 7: Voiding a Contract

If a contract is incorrect, or for some other reason needs to be aborted, the department must VOID the contract, if the contract has not been accepted by the Appointee. A contract can only be VOIDED **before** the Appointee accepts the contract. If a contract needs to be aborted after the Appointee accepts the contract, the Chair or Dean must reject the contract. If the Dean has approved a contract that needs to be aborted, the contract must be *cancelled* by the PBO. Cancellations are covered in *Section 8: Contract Cancellations*.

To Summarize:

Scenario: Initiator typed the wrong amount into the contract.

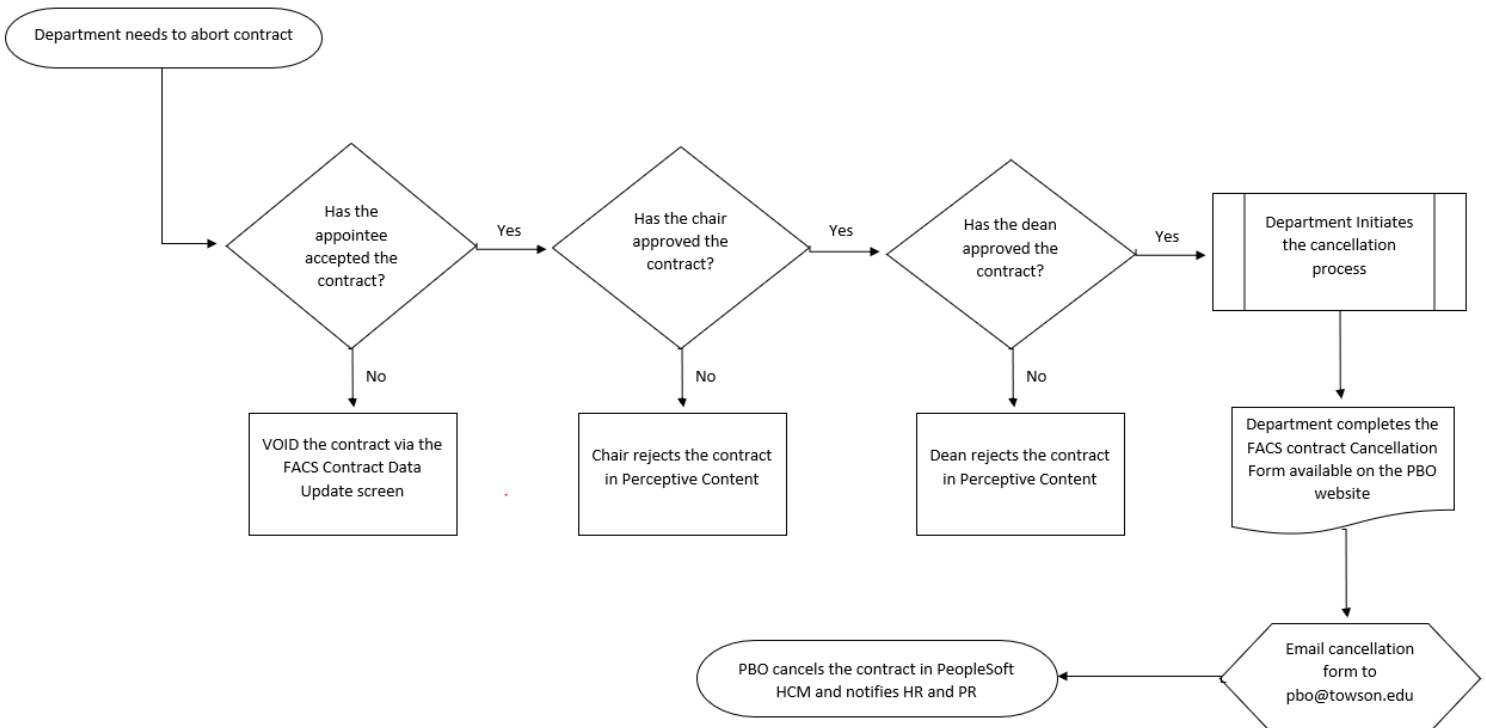| Contract Status	Action
Contract Data Entered	VOID
Appointee Acceptance Pending	VOID
Appointee Accepted/Chair Approval Pending	Chair Reject (Initiator needs to tell Chair to Reject)
Dean Approval Pending	Dean Reject (Initiator needs to tell Dean to Reject)
PBO Approval Pending	Cancellation Process – see Section 8

To VOID a contract, change the Contract Status to VOID via the FACS Contract Data Update screen.

Section 8: Contract Cancellations

A *contract cancellation* occurs after the contract is accepted by the Appointee and approved by both the Chair and the Dean. In other words, if the contract has moved beyond the Dean in the workflow process and needs to be aborted (in partial or in its entirety), the contract must be *cancelled*. Contract cancellation is a multi-step process.

Steps to Cancel a FACS Contract:

1. Notify the Appointee
2. Check contract status via the FACS Contract Data Update screen
3. Complete the Contract Cancellation Form if the contract has been approved by the Dean.
4. If payment is due for a partial cancellation or 10% payment, the form must be signed by the Chair.
5. Email the form to pbo@towson.edu.
6. The Provost Budget Office will cancel the contract in the FACS system

```
Department needs to abort contract
        |
        v
[Has the appointee accepted the contract?] --Yes--> [Has the chair approved the contract?] --Yes--> [Has the dean approved the contract?] --Yes--> Department Initiates the cancellation process
        |No                                              |No                                              |No                                              |
        v                                               v                                               v                                               v
VOID the contract via the        Chair rejects the contract        Dean rejects the contract        Department completes the FACS
FACS Contract Data               in Perceptive Content             in Perceptive Content            contract Cancellation Form available
Update screen                                                                                       on the PBO website
                                                                                                                    |
                                                                                                                    v
PBO cancels the contract in PeopleSoft    <----    Email cancellation form to pbo@towson.edu
HCM and notifies HR and PR
```

Section 9: Tools and Resources

This section provides a list of various features and components of FACS.

1. **Contract Status Values:**

Field Value	Translate Long Name	Translate Short Name
GP	Grant Approval Pending	GrantPend
AA	Appointee Accepted	ApptAccept
AR	Appointee Rejected	ApptReject
CA	Chair Approved	ChairApprv
CC	Cancelled Contract	CancelCnt
CP	Chair Approval Pending	ChairPend
CR	Chair Rejected	ChairRejec
DA	Dean Approved	DeanApprov
DP	Dean Approval Pending	DeanPend
DR	Dean Rejected	DeanReject
EC	Expired Contract	ExpiredCnt
GA	Grant Approved	GrantApprv
GR	Grant Rejected	GrantRejec
HC	HR Processing Complete	HRComplete
HH	HR Hold	HR Hold
HI	HR Processing	HR Process
HP	HR Pend Employmnt Requiremnts	HrPndEmReq
HX	HR Cancelled	HR Cancel
NP	Appointee Acceptance Pending	AppAccPend
NU	Appt Accepted Sent to ImageNow	SentImagNw
OO	Opted Out Paper Contract	Opted Out
PA	PBO Approved	PBOApprov
PC	Payroll Processing Completed	PRComplete
PH	Payroll Hold	PayrolHold
PI	Payroll Processing	PR Process
PP	PBO Approval Pending	PBOPending
PR	PBO Cancelled	PBOCancel
PX	Payroll Cancelled	PR Cancel
SE	Contract Data Entered	CntDtaEntr
VC	Voided Contract	VoidedCnt

2. **System Notifications**

   Summary of system-generated email notifications:

   - Acceptance: Contracts awaiting acceptance – email goes to Appointee – one per day
   - Approval: Contracts awaiting approval – email goes to Approver – one per day
   - Rejections: The department initiator receives an email whenever a contract is *rejected or cancelled.*

3. **Retrieve a contract from Perceptive Content:**

   a. Log into Perceptive Content
   b. Select Documents
   c. Select desired Department
   d. Enter search criteria
   e. Double-click desired file

   Note: Individuals may have different views and search options depending on their setup.

4. **Queries to view and extract data in PeopleSoft HCM**.

   # Navigation: Main Menu→Reporting Tools→Query→Query Manager

   a. To search for a query, enter "TU_FACS" in the search box:

   Query Manager

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

   Find an Existing Query | Create New Query

   *Search By: Query Name ▾ begins with TU_FACS

   Search | Advanced Search

   b. Select the desired query and then run to the desired format, either HTML (to view on screen) or Excel.

5. View contract approval status

The Department can monitor the progress of contract approvals using the FACS Contract Data Update search page. Departments can get a snapshot of the status of all contracts by entering various criteria:

Favorites | Main Menu > Towson Mods > FACS > FACS Contract Data Update

Update FACS Contract Data

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

Find an Existing Value

▼ Search Criteria

Contract ID:	= ▼	
Department:	begins with ▼	12020 🔍
Faculty Contract Type:	= ▼	▼
Term:	begins with ▼	🔍
Contract Status:	= ▼	▼
Empl ID:	begins with ▼	🔍

☐ Include History   ☐ Correct History

Select one:
Appt Acceptance Pending
Chair Approval Pending
Dean Approval Pending

[Search]   [Clear]   Basic Search 💾 Save Search Criteria

Search Results

				First ◀ 1-8 of 8 ▶ Last

View All

Contract ID	Department	Faculty Contract Type	Term	Contract Status	Empl ID	Display Name
100192	12020	Adj1 State	1124	ChairPend	0400986	Minnie Mouse
100193	12020	Adj1 State	1124	ChairPend	0400986	Minnie Mouse
100194	12020	Adj1 State	1124	ChairPend	0400986	Minnie Mouse
100195	12020	Adj1 Dept	1124	GrantPend	0400986	Minnie Mouse
100196	12020	Adj1 State	1124	ChairPend	0400986	Minnie Mouse
100197	12020	Adj1 State	1124	CntDtaEntr	0400986	Minnie Mouse
100198	12020	Adj1 State	1124	CntDtaEntr	0400986	Minnie Mouse
100199	12020	Adj1 State	1124	CntDtaEntr	0400986	Minnie Mouse

Results can be sorted by clicking on any of the column headers.

6. Initiator can view contract status

After the Appointee accepts the contract, the contract status changes to "Appointee Accepted". Navigate to the FACS Contract Data Update page to view the new contract status.

7. Troubleshooting

Use the Issue Request Form on the Provost's Budget Office website to report any of the issues listed below. A member from the PBO will respond.

Issue
Add/Delete User
No EMPL ID
No @towson.edu email address
Appointee with student email address
Desired course is not in the selection menu
Technical problems in FACS
Technical problems in Perceptive Content