SUBMITTING EXEMPT LEAVE RECAPS AND NON-EXEMPT ATTENDANCE & LEAVE 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 Number, and Pay Index Number. Recaps should include all hours worked and/or leave taken 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 upload and route the recap for signatures via DocuSign, you will start an envelope in either of the following ways:
- From the Home page, click the **NEW** drop down and select **Send an Envelope**.
- From the Manage page, click the **NEW** drop down and select **Send an Envelope**.
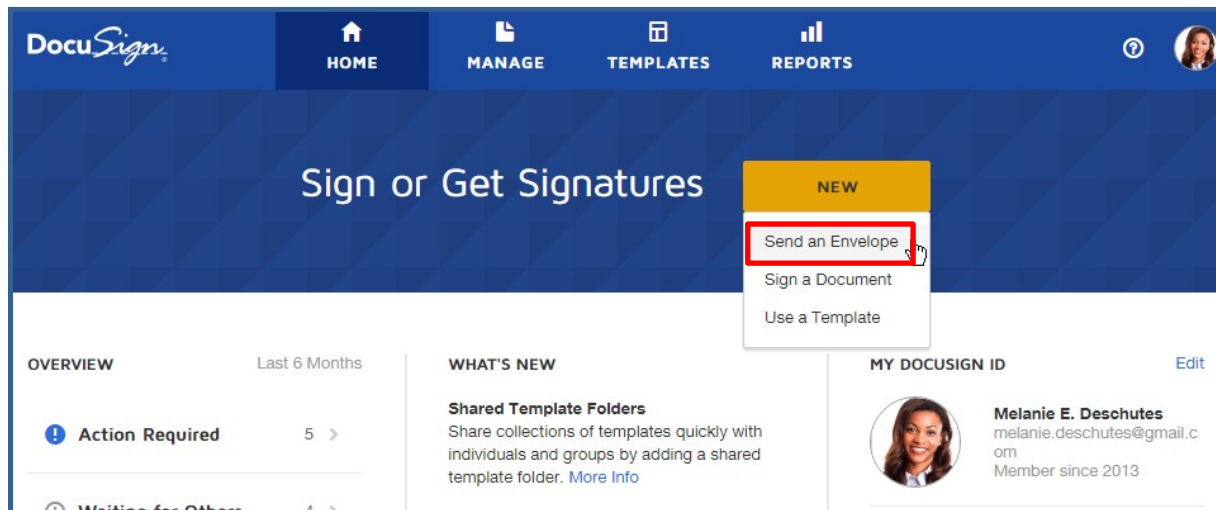
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The Prepare view appears:

Adding Documents to an Envelope

Once you start an envelope, you add the documents you want your recipients to review and sign electronically. When you add your files, DocuSign converts them to PDF format for sending and storage. File names are used to generate the default envelope name and are used when the documents are downloaded using the separate PDFs option. For recaps, please use the following naming convention for the file name: **Recap for "employee name"**. Example: Recap for John Doe

To add documents:

1. Click the blue **UPLOAD** button**,** and select the document to be signed from your computer.
2. If you need to rename the document, from the Prepare view, after you upload a file to an envelope, click the ⋮ menu icon below the document name and select **Rename Document**.

Adding Recipients

1. From the Prepare view, enter the email addresses of the recipients.

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2. Recipients should be added in the order in which they must sign. For the case of a recap, the Employee is the first recipient. Next, add the supervisor as the second recipient of the envelope. Lastly, add the **hrrecords@uwf.edu (Signing Group)** as the final recipient of the envelope. When this is received in HR we will print and process the recap to Payroll. 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. It is also important that you send to the **hrrecords@uwf.edu (Signing Group)** and not just hrrecords@uwf.edu or to a particular individual's email in Human Resources. If not, the recap will be delayed as we will not be able to access it.

3. To set the appropriate action for the recipient, choose **Needs to Sign** from the drop-down list.

4. To add additional recipient rows, click **ADD RECIPIENT**.

5. Check the **Set Signing Order** box and make sure that it routes in the following order:
   1. Employee
   2. Supervisor
   3. hrrecords@uwf.edu **(Signing Group)**

6. Click the yellow **NEXT** button to advance and add fields to the document.

Adding Signature Fields

In the recipients list at the top of the page, select a person to add signature fields to.
Note: The fields you add apply only to the selected recipient and are color-coded to match the recipient's color. You can only add fields for the recipients you designated as signers; you cannot add field for recipients who simply need to view or receive a copy only.

In the page guide at right, select a page you want to tag with fields. The selected page becomes the active page and displays in the center panel.

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From the Fields palette at left, click and drag one of the available field types to add it to the active page
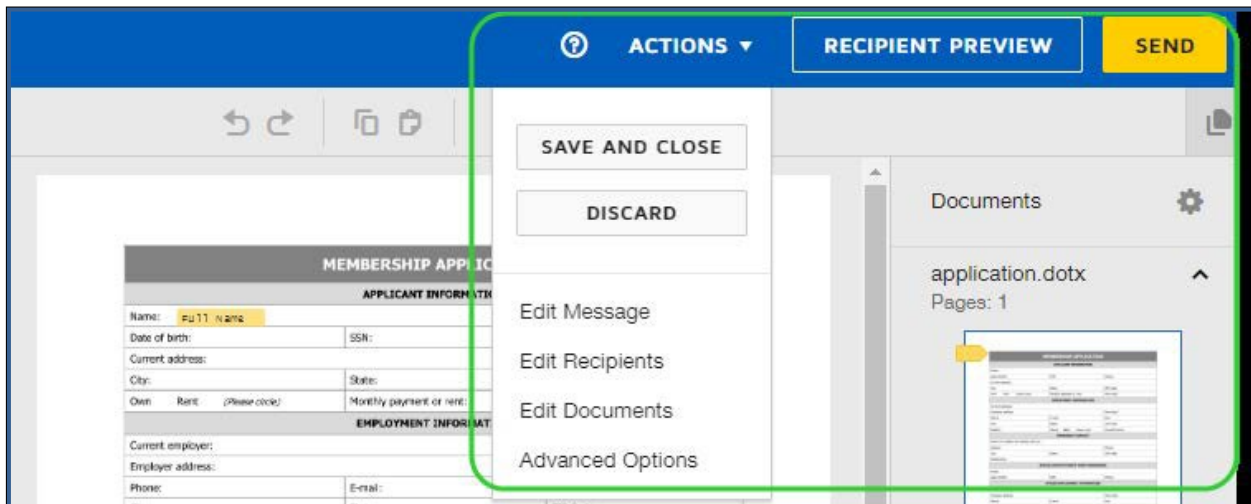
To adjust the look, the assigned recipient, or other characteristics of a field, click the field. The Field Properties panel slides in over the page guide. Set the properties as desired. Use the page guide to scroll through the pages and add more fields for your recipient.

At a minimum, you will need to add the following fields:
- Date Signed
- Signature
- Text – to add the Employee's Name (Printed) and the Supervisor's Name (Printed)

Please add Signature and Date Signed fields for the **hrrecords@uwf.edu (Signing Group)** in the HR USE ONLY box.

Previewing and Sending
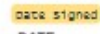
Once you finish adding documents, recipients, messages, and signing fields, you are ready to preview your work, and then send your envelope.

From the Add Fields view, the top navigation bar presents options to send, preview, save, or discard the envelope:

- To preview your recipients' experience, click **RECIPIENT PREVIEW**.
- To send your envelope, click the yellow **SEND** button.
- Once you send your envelope, your recipients receive an email notification, asking them to review and sign.

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Example Non-Exempt Recap:

UWF NON-EXEMPT ATTENDANCE & LEAVE RECAP

Pay Period:	7		From:	3/8/2020	To:	3/21/2020	Dept Name:	xxxxx			Position #: Title:	1xxxxx-00	
Last Name:	Doe		First Name:	Jane			Dept Number:	xxxxx			UWF ID:	97xxxxxxx	
Pay Index For Overtime:													

	SUN	MON	TUES	WED	THUR	FRI	SAT	Weekly TOTAL	SUN	MON	TUES	WED	THUR	FRI	SAT	Weekly TOTAL	Biweekly TOTAL
Date	3/8	3/9	3/10	3/11	3/12	3/13	3/14		3/15	3/16	3/17	3/18	3/19	3/20	3/21		
HOURS WORKED		8	8	8	8			32			8	8				16	48
LEAVE USED																	
ANNUAL								0								0	0
SICK								0				8	8	8		24	24
HOLIDAY						8		8								0	8
SPECIAL COMP								0								0	0
OVERTIME COMP								0								0	0
ADMIN TYPE:								0								0	0
ADMIN TYPE:								0								0	0
ADMIN TYPE:								0								0	0
COMPENSATION																	
HOURS AT STRAIGHT PAY	0	8	8	8	8	8	0	40	0	8	8	8	8	8	0	40	80
LEAVE **WITHOUT** PAY								0								0	0
OTHER EARNINGS																	
OVERTIME **PAY**								0								0	0
OVERTIME COMP								0								0	0
SPECIAL COMP								0								0	0

COMMENTS:

I certify that the above is a true account of the hours worked and the leave taken, for this pay period, in the UWF Department/Position indicated.

I certify that the above is a true account of the hours worked and the leave taken by this employee, for this pay period, in the UWF Department/Position indicated. Hours over 40 within the workweek were required to meet the operational needs of the Department.

HR USE ONLY

Sign ⬇

Date signed

Sign ⬇

Date signed

Sign ⬇

Date signed

EMPLOYEE SIGNATURE   DATE   **SUPERVISOR SIGNATURE**   DATE

1. After the timesheet is completed and printed, if there are any changes to be made on the printed copy, do not use whiteout. Please cross off and initial any corrections.
2. Instructions for completing the Non-Exempt Attendance and Leave Recap can be found on the second page of this document.
3. If you have any questions about completing this form, please call the Human Resources Department at 850-474-2694.
4. If Overtime is being reported and the Pay Index to charge is different from the position's index, this **must** be notated in the field above to ensure proper payment.

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Example Exempt Recap:

UWF EXEMPT LEAVE RECAP

Pay Period:	6	From:	03/08/20	To:	03/21/20	Department Name:	xxxx		Position #:		1xxxxx-00		
Last Name:	Doe			**First Name:**	John			**Dept. Number** xxxx	**UWF ID:**	97xxxxxxx		**FTE**	**1.0**

	SUN	MON	TUES	WED	THUR	FRI	SAT	Weekly TOTAL	SUN	MON	TUES	WED	THUR	FRI	SAT	Weekly TOTAL	Biweekly TOTAL
Date:	3/8	3/9	3/10	3/11	3/12	3/13	3/14		3/15	3/16	3/17	3/18	3/19	3/20	3/21		
LEAVE USED																	
ANNUAL	4							4								0	4
SICK								0	4							4	4
HOLIDAY								0								0	0
ADMIN TYPE:								0								0	0
ADMIN TYPE:								0								0	0
COMPENSATION																	
HOURS AT STRAIGHT PAY	4	0	0	0	0	0	0	4	4	0	0	0	0	0	0	4	8
LEAVE WITHOUT PAY:								0								0	0

COMMENTS:

I certify that the above is a true account of the leave taken for this pay period in the UWF Department/Position indicated.

Sign ↓		Date Signed

I certify that the above is a true account of the leave taken by this employee for this pay period in the UWF Department/Position indicated. Hours over 40 within the workweek were required to meet the operational needs of the Department.

Sign ↓		Date Signed

HR USE ONLY

Sign ↓

Date Signed

EMPLOYEE SIGNATURE	DATE	SUPERVISOR SIGNATURE	DATE

1. After the leave recap is completed and printed, if there are any changes to be made on the printed copy, do not use whiteout. Please cross off and initial any corrections.

2. Enter additional information in the Comments area that will assist Human Resources/Payroll in processing your Leave Recap. Please note that this area can be used to explain Admin Leave.

3. Record any leave taken (rounded to the nearest 1/4 hour) in the appropriate category and block for that day. If Administrative leave is taken, please notate which type of Admin Leave it is in the Comments area. If taking administrative leave due to court appearances (jury duty or witness) you must provide a copy of the subpoena to your department or HR. If taking administrative leave for military leave you must attach a copy of the military orders.

4. Types of Admin Leave (Codes): JD - Jury Duty, MIL - Military, BRV - Bereavement. For all others, please contact HR.

5. If you have any questions about completing this form, please call the Human Resources Department at 850-474-2694.