

Business Process Guide: Faculty Early Retirement Program in DocuSign


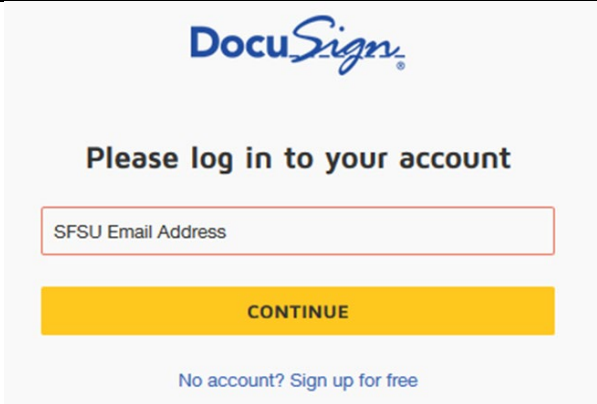
Overview

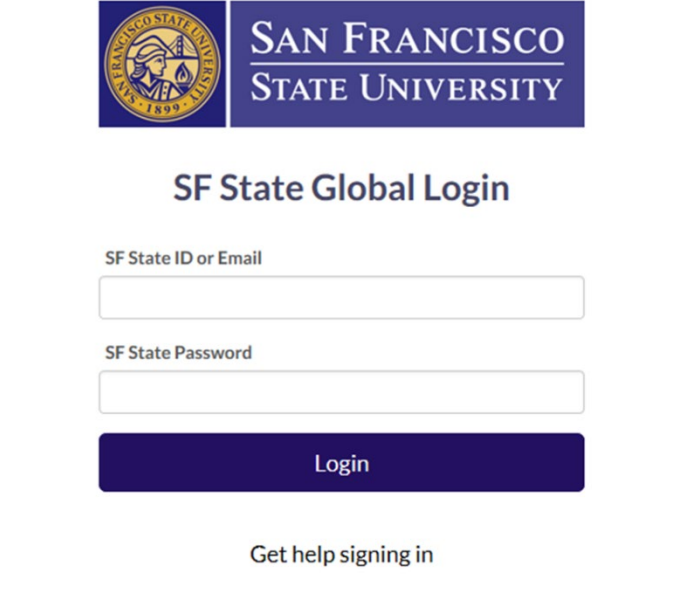
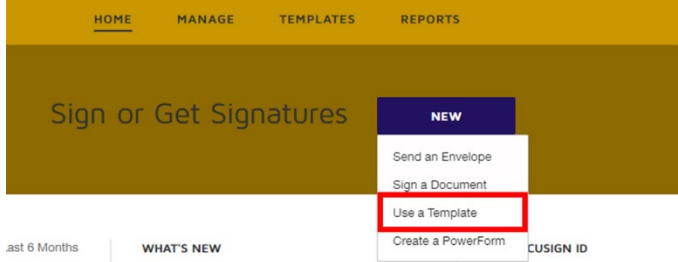
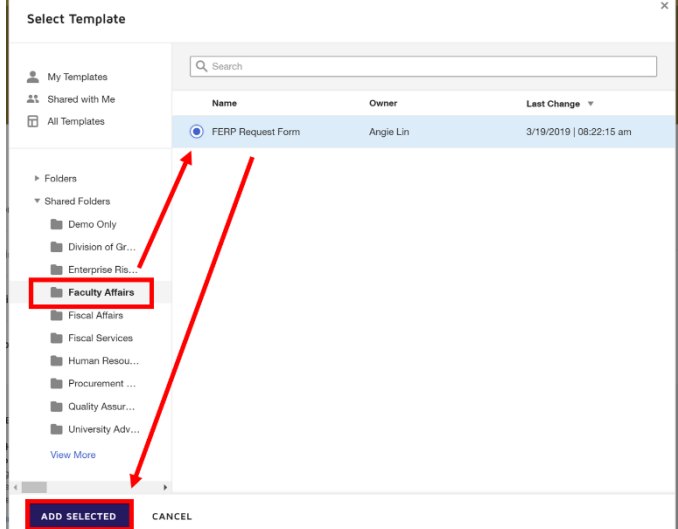
This document provides step by step instructions to complete the Faculty Early Retirement Program Form through DocuSign.

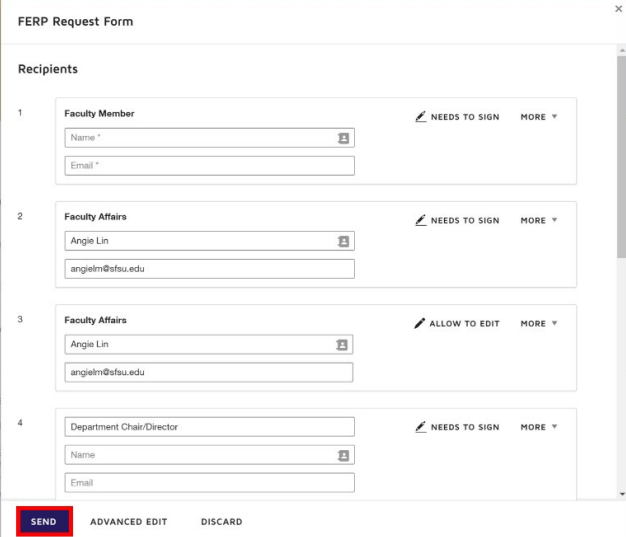
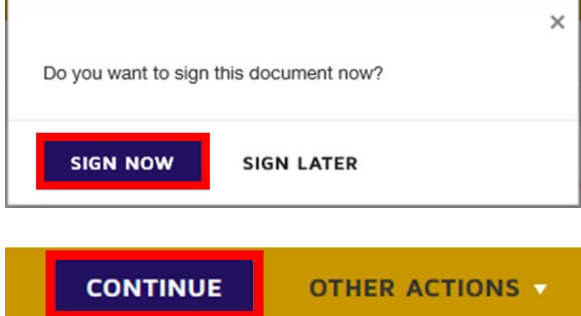
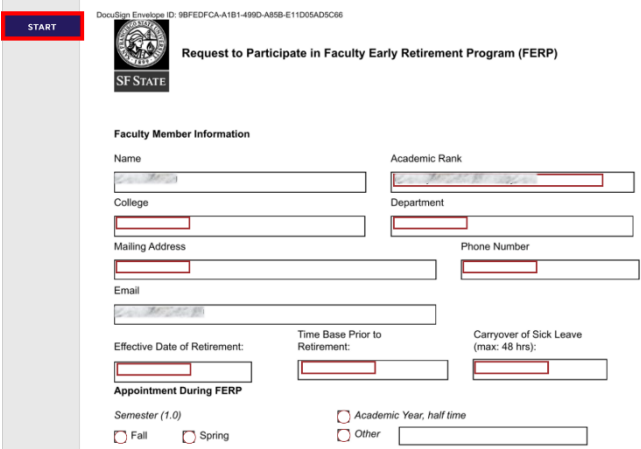

The Faculty Early Retirement Program (FERP) allows tenured faculty who are eligible for service retirement to retire and continue teaching for a maximum time-base and duration (currently 50% of your timebase in the year prior to retirement for the academic year OR one semester for a maximum of 5 years) as established in the Unit 3 Faculty Collective Bargaining Agreement, Article 29, page 78.

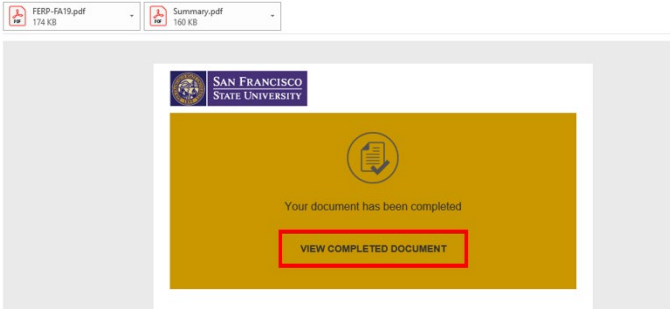
For general questions regarding Faculty Early Retirement Program, please contact Angie Lin Mendoza at angielm@sfsu.edu. For general questions regarding DocuSign, please visit [DocuSign @ San Francisco State](#) or contact Quality Assurance at gateam@sfsu.edu.

Procedures

| Steps | Examples |
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| 1. To access SFSU's DocuSign homepage, please go to https://account.docusign.com/ |  |
| 2. Enter your SFSU email address and select CONTINUE . |  |

| Steps | Examples |
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| <p>3. Enter your San Francisco State email address & select CONTINUE. Enter your San Francisco State ID or email address and password to access your DocuSign account.</p> |  <p>The screenshot shows the 'SF State Global Login' page. At the top, there is the San Francisco State University logo and name. Below that is the title 'SF State Global Login'. There are two input fields: 'SF State ID or Email' and 'SF State Password'. A blue 'Login' button is positioned below the password field. At the bottom, there is a link that says 'Get help signing in'.</p> |
| <p>4. From the DocuSign homepage, click on the NEW button and then select USE A TEMPLATE from the drop down menu.</p> |  <p>The screenshot shows the DocuSign homepage with a yellow header containing 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The main heading is 'Sign or Get Signatures'. A 'NEW' button is visible, with a dropdown menu open showing options: 'Send an Envelope', 'Sign a Document', 'Use a Template' (highlighted with a red box), and 'Create a PowerForm'. At the bottom, there are links for 'last 6 Months', 'WHAT'S NEW', and 'CUSIGN ID'.</p> |
| <p>5. Under Shared Folders, choose Faculty Affairs, check the box for FERP Request Form, and then click ADD SELECTED.</p> |  <p>The screenshot shows the 'Select Template' dialog box. On the left, under 'Shared Folders', the 'Faculty Affairs' folder is selected and highlighted with a red box. In the main area, a table lists templates. The 'FERP Request Form' template is selected, indicated by a blue row and a radio button. Red arrows point from the 'Faculty Affairs' folder and the 'FERP Request Form' row to the 'ADD SELECTED' button at the bottom left of the dialog. The 'ADD SELECTED' button is also highlighted with a red box. A 'CANCEL' button is visible at the bottom right.</p> |

| Steps | Examples |
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| <p>6. Assign routing information (i.e. add yourself as Faculty Member, and enter Department Chair/Director and College Dean/University Librarian information). When complete, click SEND at the bottom left corner of the page.</p> |  <p>The screenshot shows a 'FERP Request Form' window with a 'Recipients' section. It lists four recipients: 1. Faculty Member (Name and Email fields), 2. Faculty Affairs (Name: Angie Lin, Email: angielm@sfsu.edu), 3. Faculty Affairs (Name: Angie Lin, Email: angielm@sfsu.edu), and 4. Department Chair/Director (Name and Email fields). Each recipient has a 'NEEDS TO SIGN' or 'ALLOW TO EDIT' status and a 'MORE' dropdown menu. At the bottom, there are buttons for 'SEND', 'ADVANCED EDIT', and 'DISCARD'. The 'SEND' button is highlighted with a red box.</p> |
| <p>7. Click SIGN NOW and then CONTINUE in DocuSign.</p> |  <p>The screenshot shows a DocuSign prompt: 'Do you want to sign this document now?'. It features two buttons: 'SIGN NOW' (highlighted with a red box) and 'SIGN LATER'. Below this, there is a yellow bar with a 'CONTINUE' button (highlighted with a red box) and an 'OTHER ACTIONS' dropdown menu.</p> |
| <p>8. Select START to begin filling out required information.</p> |  <p>The screenshot shows the 'Request to Participate in Faculty Early Retirement Program (FERP)' form. It includes a 'START' button (highlighted with a red box) and a 'DocuSign Envelope ID: 9BFEDFCA-A1B1-499D-A85B-E11D05A05C66'. The form title is 'Request to Participate in Faculty Early Retirement Program (FERP)'. Under 'Faculty Member Information', there are fields for Name, Academic Rank, College, Department, Mailing Address, Phone Number, and Email. Below these are fields for 'Effective Date of Retirement', 'Time Base Prior to Retirement', and 'Carryover of Sick Leave (max: 48 hrs)'. The 'Appointment During FERP' section includes radio buttons for 'Fall' and 'Spring', and a radio button for 'Academic Year, half time' with an 'Other' field.</p> |
| <p>9. Click FINISH when you are done.</p> |  <p>The screenshot shows a yellow bar at the bottom of the DocuSign interface with a 'FINISH' button (highlighted with a red box) and an 'OTHER ACTIONS' dropdown menu.</p> |

| Steps | Examples |
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| <p>10. When the transaction is completed (i.e. all appropriate administrators approve and sign this document), you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting VIEW COMPLETED DOCUMENT.</p> |  |