Manager Self Service – Designated Campus Colleague
Quick Reference Guide

Revised: June 10, 2013
CONTENTS

Designated Campus Colleague Initiator......................................................................................................................................................... 4

Who Can Access the Request Campus Colleague Request Document ........................................................................................................ 4

Navigating the Manager Self Service Menu ........................................................................................................................................ 5

How to Navigate to the Campus Colleague Request Document ...................................................................................................... 5

Initiating Requests...................................................................................................................................................................................... 6

How to Create a New DCC ........................................................................................................................................................................ 7

  1.  Search Match .......................................................................................................................................................................................................................... 7
  2.  Start Date ..................................................................................................................................................................................................................... 9
  3.  Expiration Date .................................................................................................................................................................................................. 9
  4.  DCC Type ........................................................................................................................................................................................................... 10
  5.  Sponsor DeptID .................................................................................................................................................................................................. 10
  6.  UA Staff Emplid .................................................................................................................................................................................................. 10
  5.  Location Information ................................................................................................................................................................................................ 11
  6.  Affiliate Institution .................................................................................................................................................................................................. 11
  7.  UA Title .............................................................................................................................................................................................................. 11
  8.  Header Questions .................................................................................................................................................................................................. 12
  9.  Duties and Responsibilities ........................................................................................................................................................................ 12
  10. Average Hours ........................................................................................................................................................................................... 13
  11. Person Information ..................................................................................................................................................................................... 13
  12. Risk Management Questions ................................................................................................................................................................. 14
  13. Export Control Questions ....................................................................................................................................................................... 14
  14. Attachments ...................................................................................................................................................................................................... 15

DCC Types Requiring Attachments .............................................................................................................................................................. 16

Volunteers – Under 18 Years of Age ......................................................................................................................................................... 16

Affiliates and Associates ........................................................................................................................................................................ 16

Non-Citizen/Non-Permanent Residents .................................................................................................................................................. 16

Submitting Campus Colleague Request for Approval ............................................................................................................................. 18

How to Modify Existing DCCs .................................................................................................................................................................... 19

  1.  Extend/End Existing Relationship ................................................................................................................................................................. 19
  2.  Add Relationship .................................................................................................................................................................................................. 20

DCC Year End Dept Rollover – Multiple Transactions .................................................................................................................................................. 22

  Extending Multiple DCC End Dates ............................................................................................................................................................... 22

DCC End/Extend – Single Transactions .......................................................................................................................................................... 24
Ending/Extending DCC End Dates - Single Transactions ................................................................. 24
Approving/Denying Requests ........................................................................................................ 26
How to Approve Campus Colleague Requests ........................................................................... 26
  1. Approving the Campus Colleague Request ........................................................................... 26
  2. Confirming Approved Request ............................................................................................ 26
  3. Adding Ad Hoc Approvers and Reviewers .......................................................................... 27
How to Deny Campus Colleague Requests ............................................................................... 28
  1. Campus Colleague Deny Confirmation ............................................................................... 28
How to Return To Saved- Campus Colleague Requests .............................................................. 29
How to Withdraw- Campus Colleague Requests ........................................................................ 29
Viewing Pending Requests .......................................................................................................... 30
  1. How Approvers know Documents Are Pending Their Approval .......................................... 30
  2. How Initiators Know When Documents are Approved, Denied or Pending ...................... 31
Scenarios – Workflow Paths ......................................................................................................... 32
Error/Warning Messages ............................................................................................................ 34
DCC Worksheet ........................................................................................................................... 35
Affiliate Verification Form ............................................................................................................ 37
DCC Agreement Examples ........................................................................................................ 38
  Affiliate Agreement .................................................................................................................. 38
  Associate Agreement ................................................................................................................ 41
  Volunteer Agreement ................................................................................................................ 44
DCC Types and Category Codes .................................................................................................. 47
DCC Email Messages .................................................................................................................. 49
  Email Messages – Person with No NETID ............................................................................... 49
    DCC Email #1 - No Netid Exists upon Request Initiation (Emplid) ........................................... 49
    DCC Email #2 - No Netid Exists upon Request Initiation (PIN to Create Netid) ...................... 50
    DCC Email #3 – No Netid Exists upon Request Initiation (Personal Info and Agreement) ...... 51
  Email Messages – Person with a NETID .................................................................................. 52
    DCC Email #4 - NETID Exists Upon Request Initiation (Netid) ............................................. 52
    DCC Email #5 - NETID Exists Upon Request Initiation (Personal Info and Agreement) ...... 53
Contact Information .................................................................................................................... 53
DESIGNATED CAMPUS COLLEAGUE INITIATOR

WHO CAN ACCESS THE REQUEST CAMPUS COLLEAGUE REQUEST DOCUMENT

Each workflow document requires a minimum of two participants: an Initiator and an Approver.

Systems Control will be included as an approver for these transactions. They will be the final approval on these transactions prior to the data entering the system.

Initiating or creating a document requires either one of these roles:

- Position Cross-Reference access
- DCC Create Role

Documents require between one and four approvers:

- Business Approvers
  - HR Department
  - College Reviewer
  - College/Division
- Executive/ Administrative Approvers
  - Export Control
  - UA Central HR
  - Systems Control

College/Divisions determine the number of approval steps required.
NAVIGATING THE MANAGER SELF SERVICE MENU

HOW TO NAVIGATE TO THE CAMPUS COLLEAGUE REQUEST DOCUMENT

The Campus Colleague Request Document is located in UAccess Employee – www.uaccess.arizona.edu

To access the document:
1. Click on the Manager Self Service menu item
2. Click on MSS Online Forms
3. Click on People
4. Click on Campus Colleague Request
INITIATING REQUESTS

The “Campus Colleague Request” page allows the user to:

- **Create a New DCC**
  - This option allows the user to create a new person in the UAccess Employee system and create a DCC relationship.

- **Modify Existing DCC**
  - **Extend/End Existing Relationship**
    - This option allows the user to extend the expiration date or end an existing relationship by changing the expiration date.
  - **Add Relationship**
    - This option allows the user to add a new relationship to an existing person in the system or add an additional DCC relationship to a person.
    
    *Note: Employees are not allowed to have a DCC relationship unless they fall under the College of Medicine.*

- **Return to Work in Progress**
  - **Note:** This option is only available if a user has previously saved a request form. Saved requests are stored for 30 Calendar days. Users can return back to a transaction previously saved and continue.

*Note: DCC’s are the merger of POI’s and DSV’s into one set of tables in UAccess Employee. The POI and DSV acronyms will no longer be used. They will be replaced by DCC, which will be the umbrella for the following categories:*

- **Affiliates**
- **Associates**
- **Government Agency Staff**
- **Grad Committee Members**
- **Health Care Partners**
- **Independent Contractors**
- **Inter Institutional Faculty and Staff**
- **Pre-Hires**
- **Temp Agency Employees**
- **Volunteers**
  - **Dept. Sponsored**
  - **Event**
  - **4-H**
- **UA Foundation Members**
HOW TO CREATE A NEW DCC

Click on the “Create a New DCC” radio button to start the process for creating a new person in the system.

![Designated Campus Colleague Request](image)

1. SEARCH MATCH

This should automatically open up the next screen “DCC Search Match”. Enter the DCC Information to perform a Search Match prior to opening the request form. This validates the person’s information against existing people in the UAccess Employee system to prevent duplicate Emplids. All required fields have an asterisk (*).

Click the “Search” Button to start Search Match.

![Search Match](image)
NO RESULTS
The following message will appear if the criteria entered does not match existing person records in the system:

Click the “No Emplid Match, Create MSS ID” button to continue to the next page and start the request form.

SEARCH RESULTS
If the criteria entered does match an existing person’s records in the system they will be displayed as shown below. If a person matches, click the “Use This ID” button to modify the existing person. Otherwise, click the “No Emplid Match, Create MSS ID” button to continue to the next page and start the request form.
2. START DATE

The Start Date on the “Designated Campus Colleague Request” page automatically defaults to the current date. It can be changed to reflect future dates up to 30 days in advance and up to 30 days in the past. This is a required field.

1. Enter the start date if different than the populated value.

3. EXPIRATION DATE

The Expiration Date on the “Designated Campus Colleague Request” page automatically defaults to the end of the current fiscal year. It can be changed to an earlier date; however, there is a minimum of 30 calendar days for Affiliate DCC types and 7-day minimum for all other DCC types. This is a required field.

All DCC types will renew with each Fiscal Year to ensure the relationship should continue from both a department and DCC perspective.

Note: Persons that are not US Citizens or Permanent Residents and have a Visa expiration date prior to the end of the current fiscal year will automatically default to the Visa Expiration date instead.

1. Enter the expiration date if different than the populated value.
4. DCC TYPE

The “DCC Type” field is a dropdown list that allows the user to select the appropriate DCC relationship. In addition to a DCC Type some categories may contain a sub-category to further define the DCC type. This is a required field.

5. SPONSOR DEPTID

The “Sponsor DeptID” field is used to define the sponsoring University of Arizona dept that the DCC will perform the services for the duration of the relationship. Use the magnifying glass to activate the search box to find a department using other criteria. This is a required field.

6. UA STAFF EMPLID

The “UA Staff Emplid” field is used to enter the Emplid of the UA Staff who will direct and control services performed by the DCC. Use the magnifying glass to activate the search box to find Emplids using other criteria. This is a required field.
5. **LOCATION INFORMATION**

The Location Information section allows the user to enter the Building, Room and PO Box (only available for College of Medicine sponsoring depts.) for the DCC. This is an optional field and if left blank will default to the location of the sponsoring dept.

6. **AFFILIATE INSTITUTION**

The “Affiliate Institution” field only appears if the Affiliate DCC type is selected. The user must pick a valid Institution from the dropdown list. If a new institution needs to be added, please contact Central Human Resources for additional information. Use the magnifying glass to look up an Affiliated Institution. This field is required.

7. **UA TITLE**

The “UA Title” field only appears as an “editable” field for Affiliate and Associate DCC Types. Use the magnifying glass to lookup existing UA Titles. Otherwise, the field will default to a generic title for all other DCC Types and appear as read only. This is a required field.
8. HEADER QUESTIONS

The questions displayed below appear based on DCC types, sponsoring dept and responses to the preceding questions. Please see an example of all questions that may appear in the header section. If displayed the questions require a response.

Persons that are not US Citizens or Permanent Resident and are performing their services in the US must supply Visa/Permit Data and the appropriate documentation must be attached. Please contact your HR rep for information on the types of documents to attach.

9. DUTIES AND RESPONSIBILITIES

The "Duties and Responsibilities" text box is required of all DCC types. The user must enter general duties and responsibilities of the services performed by the DCC. Please NOTE: Text typed in this section will appear on DCC agreements (if applicable to DCC type). This is a required field.
10. AVERAGE HOURS

The “Average Hours” field is used to indicate the average hours per week the services will be provided. This information will not appear on agreements (if applicable). This is a required field.

11. PERSON INFORMATION

The “Person Information Section” brings in the information provided in the initial Search Match and includes Gender, First Name, Last Name and Date of Birth. These fields are editable by the initiator. Please see details below regarding additional fields that appear in this section.

Social Security Number

This field is optional and only appears if the header question indicates the DCC is a US Citizen or Permanent Resident. Users may also check the “Applied for SSN” box if the SSN is not yet available for the DCC. If the information is unavailable the DCC can complete this field when they receive the request form for acceptance.

Personal Email

This field is required in order to notify the DCC of the relationship. DCC’s are required to accept every relationship created and may need to complete personal information, questions and view and accept an agreement if applicable. Users may not enter an email ending in “Arizona.edu”.

UA Phone Directory

This field is optional and only appears for the following DCC Types: Affiliates, Associates, Health Care Partners, Independent Contractors, Volunteers – Dept. Sponsored, and UA Foundation Members. If left blank, the information will default to the sponsoring department’s phone number.
12. **RISK MANAGEMENT QUESTIONS**

The questions displayed below appear for specific DCC types. Please see an example of all questions that may appear in the Risk Management section. If displayed, the questions require a response.

Users may click the “I” icons to display additional information about that section of questions. A message box will appear that will include external links to websites for further review.

13. **EXPORT CONTROL QUESTIONS**

The questions displayed below appear based on DCC types and responses received from header questions. Please see an example of all questions that may appear in the Export Control section. If displayed the questions require a response.

Users may click the “I” icons to display additional information about that section of questions. A message box will appear that will include external links to websites for further review.
14. ATTACHMENTS

Initiators and Approvers may upload and remove attachments to a request while the transaction is pending. Attachments for Campus Colleague requests can only be viewed by anyone who has access as an initiator or approver for the transaction. Once the transaction has been approved the documents are no longer available for viewing. This is due to the sensitive nature of the Visa documents.

To Add an Attachment:
1. Click the “Add Attachment” link.
2. Click the “Browse” button and navigate to your saved document for uploading. Select the document.
3. Once the document path has loaded, click “Upload”.
4. The document will display with the description and document extension type.

To View an Attachment:
1. Click the link in the “View Attachment” column for the document you wish to view.
2. The document will open up in a separate window.

To Delete an Attachment:
1. Select the radio button next to the attachment you want to remove.
2. Click the “Delete Attachment” link.
3. A confirmation message will say “Attachment Deleted Successfully.”
DCC TYPES REQUIRING ATTACHMENTS

VOLUNTEERS – UNDER 18 YEARS OF AGE

A Volunteer Agreement signed by an individual's parent must be attached to the request after the person under age 18 accepts the agreement in Self Service.

- The individual will print the agreement, have the parent sign it and turn it in to the initiator/sponsor.
- The initiator/sponsor will attach the signed agreement to the transaction before Systems Control approves it.

AFFILIATES AND ASSOCIATES

- Affiliate and Associate DCC requests require an attachment containing:
  1. A Curriculum Vita (CV).
  2. The Affiliate Verification Form (AVF) signed by an authorized representative from the affiliated institution.

Note: HR will review the requests to ensure the appropriate documents are attached.

NON-CITIZEN/NON-PERMANENT RESIDENTS

- If the person answers “NO” to the citizenship question (and they are performing services in the U.S.) check to make sure the following documents are attached:
  o J1 Status – I-94 and DS-2019, or
  o F1 Status – I-94 and I-20

Note: Hard copy documents from person/department do not have to be sent to Systems Control.
SUBMITTING CAMPUS COLLEAGUE REQUEST FOR APPROVAL

To submit the Campus Colleague request for approval.

1. Click on the “Submit” button

Note: The request can be cancelled by clicking on the “Exit” button. Users may also save the request by clicking on the “Save for Later” button.
HOW TO MODIFY EXISTING DCCS

Click on the “Modify Existing DCC” radio button to start the process for creating a new person in the system. Clicking this action allows the user to do one of the following:

- **Extend/End Existing Relationship**
  - This option allows the user to extend the expiration date or end an existing relationship by changing the expiration date.
  - This can also be accomplished directly from the Extend/End Request form (see DCC Extend/End Request – Single Transaction section)

- **Add Relationship**
  - This option allows the user to add a new relationship to an existing person in the system or add an additional DCC relationship to a person.
  - *Note: Employees are not allowed to have a DCC relationship unless they fall under the College of Medicine.*

1. **EXTEND/END EXISTING RELATIONSHIP**

Select the Extend/End Existing Relationship option.

Select the Extend/End Existing Relationship option. This will open up the Extend/End DCC Relationship Search page. Enter criteria to find the DCC to modify and select the person.
Enter the New Expiration Date to Extend or End the DCC relationship. Users are required to enter a reason for the change. Once completed, click the "submit" button to route for approval.

1. **ADD RELATIONSHIP**

Select the Add Relationship option.

Enter the Emplid or use the magnifying glass to search for the person to modify.
The Campus Colleague Request form is displayed once the user clicks the Continue button. Complete the form similar to the Creating the New DCC instructions. Please refer to this section for additional details on the fields.
DCC YEAR END DEPT ROLLOVER – MULTIPLE TRANSACTIONS

An Annual DCC electronic rollover process has been created to End/Extend multiple DCC relationships for individuals up to but no later than June 30th of every fiscal year.

- All DCC’s must be renewed to avoid interruption of access to services.
- The new rollover process requires action from the sponsoring department.
- This option does not provide the ability to add attachments
  - Submit transactions requiring attachments using the "Request DCC Extend/End" form (see the “DCC Types Requiring Attachments” section for more information).

The user initiates a roll over list by navigating as follows:

- UAccess Employee → Manager Self Service → MSS Online Forms → People
  - DCC Year End Dept. Rollover

- Enter the sponsoring department ID to create a list of individuals with current DCC relationships (this includes only DCCs whose expiration dates are within 30-days of the initiation date).
- DCC relationships with expiration dates that go back more than 30-days from the current date must be submitted using the “Add Relationship” option on the Designated Campus College Request form. Note: The “Add Relationship” option requires the acceptance of a new DCC agreement by the individual.

EXTENDING MULTIPLE DCC END DATES

New Expiration dates can be entered for individuals continuing their DCC relationship (not to exceed 6/30 of the current fiscal year).

- The DCC expiration dates can be updated for the full or partial list of individuals displayed.
- Users can continue to update records using the Year-End Dept Rollover as long as DCC expiration dates do not exceed the 6/30 fiscal year end date.
Enter the “New Expiration Date” for individuals who will continue to maintain a DCC relationship with the Sponsoring Dept.

If a partial list is submitted, the record(s) updated will display a check mark in the “Transaction Pending?” box. The remaining DCC expiration dates are available for update.

DCC Expiration dates cannot be extended beyond the “Visa Exp Dt.” Submit a DCC Extend/End Request to update both the DCCs “Visa Exp Dt” and the “New Expiration Date”.
DCC END/EXTEND – SINGLE TRANSACTIONS

The DCC End/Extend process is designed to extend an end date for one DCC at a time for up to but no later than June 30th of every fiscal year.

- All DCC’s must be renewed to avoid interruption of access to services.
- The DCC End/Extend Request can be used to modify end dates as long as the expiration date for the DCC relationship is not greater than 30-days from the current date.

The user initiates a DCC Extend/End request by navigating as follows:

- UAccess Employee → Manager Self Service → MSS Online Forms → People
- Request DCC Extend/End

ENTURING/EXTENDING DCC END DATES – SINGLE TRANSACTIONS

The End/Extend DCC Relationship search page will automatically appear when the Request DCC Extend/End option is selected. Several search criteria are available to assist with the retrieval of the appropriate DCC record to modify.

Enter the New Expiration Date to Extend or End the DCC relationship. Users are required to enter a reason for the change.
Once completed, click the “submit” button to route for approval.
HOW TO APPROVE CAMPUS COLLEAGUE REQUESTS

Campus Colleague requests pending approval can either be accessed through the “pagelet” or the “Manage Campus Colleague” page or the “Manage DCC Extend/End Request” page. The option to approve a request will only appear if the user has both the appropriate approval role and is the next step in the approval chain.

1. APPROVING THE CAMPUS COLLEAGUE REQUEST

To approve a Campus Colleague request

   - Click on the “Approve” button

2. CONFIRMING APPROVED REQUEST

Once the Campus Colleague request is approved, a confirmation page displays the information from the previous page in view only mode. The “green box” in the process monitor (the rectangular boxes on the bottom of the page) shows that the first approval step has been satisfied.

   - Click on the “Exit” button to return to the search menu.
3. ADDING AD HOC APPROVERS AND REVIEWERS

Ad hoc approvers and reviewers can be added by HR Department, College Reviewers and College Approvers at any step following an approval step in the chain. For example, the HR Department can add an ad hoc approver or reviewer after the College Reviewer or College Approver steps. Note: the Ad hoc “Approver” will stop the routing flow until the user takes action—the Ad hoc “Reviewer” notifies the user of the transaction and does not require approval.

To add an ad hoc approver or reviewer:

1. Click on the + sign to the right of the approval step the ad hoc step will follow.
   - Do NOT add an AHDOC APPROVER after the Systems Control Step. Systems Control is the final step in the workflow and will deny requests that include an adhoc APPROVER after their step. **Users may however add adhoc REVIEWER’S after systems control step if needed.**

2. This will activate the “Insert additional approver or reviewer” window.
   a. Type in the user id for the ad hoc approver or reviewer
      - See Approver/Reviewer Search below if the user id is unknown
   b. Click on either the “Approver” or the “Reviewer” radio button
   c. Click on the “Insert” button

3. Approver Reviewer Search
   The spy glass in the “Insert additional approver or review” window will activate the “Approver/Reviewer Search” option (see previous section)
   1. Type the user's name or user ID
   2. Click on the “Search” button
      A list of users meeting the search criteria will appear
   3. Select the ad hoc approver or reviewer by clicking on the individual's name or user id.

   The “Insert additional approver or reviewer” window will reappear
   4. Click on either the “Approver” or the “Reviewer” radio button
   5. Click on the “Insert” button
HOW TO DENY CAMPUS COLLEAGUE REQUESTS

The option to deny a request appears if the user has both the appropriate approval role and is the next step in the approval chain.

To deny a request
1. Type the reason for denial in the comments section
2. Click on the “Deny” button

1. CAMPUS COLLEAGUE DENY CONFIRMATION

Once the Campus Colleague request is denied, a confirmation page displays the information from the previous page in view only mode. The process monitor shows that the Campus Colleague Request has been denied. Additionally, an email is sent to the initiator notifying him/her of the denied request.

1. Click on the “Exit” button to return to the search menu
HOW TO RETURN TO SAVED - CAMPUS COLLEAGUE REQUESTS

Initiators have the ability to return to saved Campus Colleague requests by accessing the specific employee in the “Campus Colleague Requests” page. A new radio button will appear with description “Return to Work in Progress”. The user has the option to select a saved request for cloning up to 30 days after it was initially saved.

To return to a saved Campus Colleague request:
1. Select the “Return to Work in Progress” radio button

![Return to Work in Progress](image)

Note: This action moves the transaction to the next page—to complete the form.

HOW TO WITHDRAW - CAMPUS COLLEAGUE REQUESTS

Initiators have the ability to withdraw Campus Colleague requests by accessing the specific transaction in the “Manage Campus Colleague” page for new DCC’s or the “Manage DCC Extend/End Request” page for modified DCC requests. Withdrawing the request essentially cancels the request from all pending approvers. Initiators may withdraw a request up until final approval. These requests are stored for 30 days and may be cloned to create a new request.

How to withdraw a request:
1. Search for the request in the “Manage Campus Colleague” or the “Manage DCC Extend/End Request” page.
2. Once transaction is selected and opened click the “Withdraw” button.

![Withdraw](image)
VIEWING PENDING REQUESTS

Pending approval requests are available for viewing in two formats:
- Pagelets
- Manage Campus Colleague Requests – New DCC Requests
- Manage DCC Extend/End Request – Modified Existing DCC Requests

1. HOW APPROVERS KNOW DOCUMENTS ARE PENDING THEIR APPROVAL

The UAccess Employee main page automatically displays a “pagelet” summary listing the transactions pending the individual approver’s action.
- The “pagelet” provides a “transaction” link directly to the transactions requiring the user’s approval.
- Each transaction type displays a total count of transactions available for approval.
- Selecting the "home" key on the first tab on the upper right side of any page will return the user to the MSS Approval Summary Pagelet.

Note: if a transaction type link is not available, this means no requests are available for approval at this time.
- Once a user selects a transaction type from the MSS Approval Summary they are directed to the individual transaction pagelet.
- Additional details for each transaction are made available to allow for selection of the transaction to work next.
2. **HOW INITIATORS KNOW WHEN DOCUMENTS ARE APPROVED, DENIED OR PENDING**

The “Manage Campus Colleague” and “Manage DCC Extend/End Request” pages allow users with the UAccess Employee Position Cross-Reference or the DCC Create role to view Campus Colleague requests that are approved, denied, pending or withdrawn.

The Search dialog box provides multiple options for accessing Campus Colleague transactions.

1. Enter the Initiator NetID or other criteria listed in the Search dialog box
2. Click on the “Search” button
   
   A list of values that meet the search criteria will be displayed
3. Click on any of the values listed to access specific transactions
   
   1. The user’s role and current approval step will determine whether the record is view only or available for change or approval.
SCENARIOS – WORKFLOW PATHS

The following examples describe the workflow paths a user may encounter when initiating or approving a document.

SELF APPROVAL

Initiator with HR Dept, College Reviewer or College approval role(s)
- The step for the specific approval role automatically self approves when the request is submitted.

Please see the example below:
HR Department Approver initiating a request

AUTO APPROVAL

Approver listed on multiple steps in path(s)
- Multiple paths for the same approver are automatically approved on all steps.

Please see the example below:
College/Division approving a request in which they are listed in multiple steps.
COLLEGE INITIATES A REQUEST

College initiates a request
- The HR Department Approvers are notified of the change via email.
- The request will automatically route to Systems Control upon submission.

Please see the example below:

The system skips steps if it does not find approvers
- Steps are skipped if no one is assigned to an approval role
- At least one “HR Dept/College” approver is required for the path

Please see the example below:

Transactions routed to an Error Step if no approvers assigned
- All steps are skipped if no approvers are assigned
- A Systems Control Approver will troubleshoot the transaction

Please see the example below:
ERROR/WARNING MESSAGES

The following examples describe the error or warning messages a user may encounter when initiating or approving documents.

ANOTHER APPROVER HAS TAKEN ACTION

A single step may have multiple approvers

- More than one approver can simultaneously review a transaction; however, only ONE can take action.

The following error message indicates another approver has already completed the step.

![Error Message Example]

REQUEST IS ALREADY PENDING

Only one request to extend/end a relationship can be pending for a DCC at a time. The following error message indicates another request is pending approval. The transaction # is listed so users can look up the transaction in “Manage DCC Extend/End Request” and find who initiated the action. The initiator can withdraw the previous transaction if needed.

![Pending Request Example]
DCC Worksheet

Please use this worksheet to prepare data about the individual and related DCC activities/functions to be performed.
(For additional information, please visit www.hr.arizona.edu/dcc)

<table>
<thead>
<tr>
<th>DCC Personal Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>DCC Relationship:</td>
<td></td>
</tr>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Date of Birth:</td>
<td>/ /</td>
</tr>
<tr>
<td>SS# (optional):</td>
<td>- -</td>
</tr>
<tr>
<td>Gender: M F Unknown</td>
<td></td>
</tr>
<tr>
<td>Personal email:</td>
<td></td>
</tr>
<tr>
<td>Emplid (if known):</td>
<td></td>
</tr>
<tr>
<td>UA title (Affiliate and Associates only):</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Position Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor's Emplid:</td>
<td></td>
</tr>
<tr>
<td>Start date:</td>
<td>/ /</td>
</tr>
<tr>
<td>Expiration date:</td>
<td>/ /</td>
</tr>
<tr>
<td>Average weekly hours:</td>
<td>whole numbers only please</td>
</tr>
<tr>
<td>Brief (under 250 characters) description of duties:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Security Sensitive Functions - (For additional information please visit <a href="http://policy.arizona.edu/pre-employment-screening">http://policy.arizona.edu/pre-employment-screening</a>)</th>
<th>Yes</th>
<th>No</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Significant financial oversight responsibilities?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unsupervised contact with minors who are not enrolled students of the University?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted access to residence hall rooms?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role designated by Dean or Vice President as “security or safety sensitive”?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Driving on university business in UA, rented, or personal vehicles?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Import/Export - (For additional information please visit <a href="http://orcr.vpr.arizona.edu/export-control">http://orcr.vpr.arizona.edu/export-control</a>)</th>
<th>Yes</th>
<th>No</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. US Citizen or Permanent Resident?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Collaborating on research activities with UA faculty or research scientist? If No to #1 and Yes to #2, please complete #3 - 7, otherwise skip to 8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Access to ITAR controlled data, technology, materials information, software or equipment?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Access to EAR Controlled technology or encryption software code?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Involved with a project that: a. Has restrictions on the release of certain project information?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Has a publication or access and dissemination restriction?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Has a military connotation or end-use?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Is sponsored by a defense agency?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Is related to space, missile technology, or biological/chemical weapons?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Requires foreign national approval by sponsor or no foreign nationals are allowed?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Involved in a project that has a technology control plan in place?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Do you have a reason to believe the individual will need an export license?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Specialized Training Required - (For additional information please visit <a href="http://risk.arizona.edu/training/index.shtml">http://risk.arizona.edu/training/index.shtml</a>)</th>
<th>Yes</th>
<th>No</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Working in a laboratory setting with any of the following: a. Bloodborne pathogens or other biological materials?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Radioactive materials?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Lasers or other non-ionizing radiation?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td>Yes</td>
<td>No</td>
<td>Comments</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>-----</td>
<td>----</td>
<td>----------</td>
</tr>
<tr>
<td>d. Hazardous Chemicals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Working in a non-laboratory setting with chemical or biological</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>materials?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Handling animals (living or deceased), animal tissues, fluids, or</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>waste byproducts in a research setting?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Performing work that requires protective equipment including</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>respiratory and hearing protection?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**College of Medicine - (For additional information please visit [http://ahsc.arizona.edu/contracting](http://ahsc.arizona.edu/contracting)**

<table>
<thead>
<tr>
<th>Participating in clinical teaching of medical students or residents?</th>
<th>Yes</th>
<th>No</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>If Yes, complete next question</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Signed a preceptorship agreement through contracting office or</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>associated with an institution that has an executed preceptor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>agreement on behalf of clinicians?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Citizenship/Visa Status**

<table>
<thead>
<tr>
<th>Citizenship/Visa Status</th>
<th>Yes</th>
<th>No</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>If No to #1 and Yes to #12, Visa/Permit Data (provide copy of Visa status documents)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Citizen/Passport Country:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visa Type:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visa Status Date:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visa Exp. Date:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Required Attachments**

For Affiliates: CV, Affiliate Verification Form

For Associates: CV

For Grad Committee Members: CV or other rationale

Preparer: ____________________________ Date Completed: __/__/___
AFFILIATE VERIFICATION FORM

The University of Arizona’s commitment to learning and discovery is generously supported by “Affiliates” who directly contribute to the academic, research and service mission of the University. Affiliates are select individuals from outside agencies, institutions and hospitals that have been afforded contractual “affiliate” status by the University’s Office of the Provost.

I am requesting that the individual below be designated as a University of Arizona (UA) Affiliate.

**AFFILIATE INFORMATION**

<table>
<thead>
<tr>
<th>Last Name:</th>
<th>First Name:</th>
<th>MI:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Contact Phone #:</th>
<th>Email Address:</th>
</tr>
</thead>
</table>

**Name of affiliate institution:**

<table>
<thead>
<tr>
<th>Current job title and function:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Current # of hours worked in a week:</th>
<th>Anticipated weekly hours worked at UA:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Anticipated start date:</th>
<th>Anticipated end date:</th>
</tr>
</thead>
</table>

**Brief description of duties to be performed for the University:**

---

**APPROVER INFORMATION**

<table>
<thead>
<tr>
<th>Last Name:</th>
<th>First Name:</th>
<th>MI:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Position Title:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Contact Phone #:</th>
<th>Email Address:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Mailing Address:</th>
</tr>
</thead>
</table>

My signature affirms that the employee above is authorized to conduct teaching, service or research-related duties for the University and that he/she meets the requirements to be designated as “Affiliate” as outlined in the written agreement between our institution and the University of Arizona.

**Approver Signature:** ___________________________ **Date:** ______________

(Please forward this form to the business office of the University of Arizona sponsoring department.)
DCC AGREEMENT EXAMPLES

AFFILIATE AGREEMENT

The University of Arizona is generously supported by Affiliates and other Designated Campus Colleagues who contribute their time, services and expertise to help the University accomplish its missions of teaching, research, service and outreach. As an Affiliate, you are not an employee of the University; however, you are required to follow all Arizona Board of Regents and University rules and policies regarding the conduct of University employees. With this Agreement, you may be eligible to take advantage of certain University services and privileges, as outlined at www.hr.arizona.edu/DCC. This Agreement also establishes standards and guidelines so that both you and the University understand the nature of your Affiliate relationship and the limitations of such a relationship.

The Arizona Board of Regents (hereafter either ABOR or the “University”) and DCC’s Name (hereafter “Affiliate”) agree to the following terms:

1. VOLUNTARY SERVICE – Affiliate agrees that he or she is providing services voluntarily to the University for Dept/College/Division/Unit solely for personal, civil, charitable or humanitarian purposes without promise or expectation of compensation, benefits or future employment with the University beyond any specified reimbursement agreements. Affiliate acknowledges that he or she is not an employee of the University. If Affiliate becomes an employee of the University while serving as an Affiliate, he or she agrees to immediately notify Dept/College/Division/Unit and understands he or she may no longer provide services as an Affiliate or other Designated Campus Colleague.

2. AUTHORIZATION TO WORK/VOLUNTEER – If Affiliate is not a citizen or permanent resident of the United States, he or she affirms that he or she has the appropriate visa status that authorizes him or her to be present in the United States and allows him or her to participate in this type of service. Affiliate also affirms that he or she has submitted documentation to this effect to Dept/College/Division/Unit and agrees to immediately inform his or her departmental sponsor or Dept/College/Division/Unit business office of any change to his or her visa status.

3. ASSIGNMENT PERIOD – Affiliate will begin his or her assignment on start date, and it is anticipated that his or her assignment will end no later than end date. Affiliate understands that any extension of this assignment will require him or her to sign another agreement. This includes extensions that may occur at the beginning of each fiscal year.

4. REPORTING RELATIONSHIP – Affiliate will coordinate his or her activities through name of supervisor and Dept/College/Division/Unit.

5. ASSIGNMENTS AND DUTIES – Understanding that Affiliate is providing services voluntarily, he or she nevertheless agrees to follow the directions of administrators, faculty, or staff and to abide by ABOR and University policies and procedures while carrying out his or her Affiliate assignments. Affiliate will engage in the following activities: Duties/responsibilities completed on DCC request.
6. **NOTIFICATION OF POLICIES** – Affiliate acknowledges that he or she has been given access to all University policies at [http://policy.arizona.edu/](http://policy.arizona.edu/) and understands that he or she has received and expected to review the following University policies and take the following online training as a requirement of signing this Agreement:

   a. Equal Employment Policy at [http://equity.arizona.edu/equal_employment_policy](http://equity.arizona.edu/equal_employment_policy);
   b. Nondiscrimination and Anti-harassment Policy at [http://policy.arizona.edu/sites/default/files/Non-discrim-interim.pdf](http://policy.arizona.edu/sites/default/files/Non-discrim-interim.pdf); and,
   c. Preventing Sexual Harassment (online training program) at: [http://equity.arizona.edu/education/harassment](http://equity.arizona.edu/education/harassment).

Affiliate also understands that he or she is required to successfully complete all applicable training required for performing the Affiliate activities.

7. **EMAIL AND NET ID** – Affiliate has been assigned a NetID, which is a personal identifier that provides access to online services, and an email account that serves as a mechanism for receiving official communications within the University. Affiliate acknowledges that he or she will receive any future Affiliate agreements or other official University business information through his or her assigned University email account. Affiliate also agrees to provide current contact information to the University so long as he or she is a University Affiliate. Personal information updates should be submitted online at: [URL HERE](http://policy.arizona.edu/).  

8. **PRE-SCREENING AND BACKGROUND CHECKS** – Affiliate hereby gives the University of Arizona permission to inquire into his or her education, references, driving record, employment, volunteer history, and criminal background. Affiliate understands that the University will only use this information for the purpose of this Agreement. 

Affiliate understands that this relationship is contingent upon the successful outcome of criminal background checks or other prescreening checks for non-employees, if required, as described in the University's Pre-Employment Screening Policy available at: [http://policy.arizona.edu/pre-employment-screening](http://policy.arizona.edu/pre-employment-screening).

9. **CLINICAL TEACHING** – If Affiliate is participating in clinical teaching, Affiliate agrees that he or she has either signed or will sign a preceptorship agreement with the University or that Affiliate is employed by an institution that has executed a preceptor agreement on behalf of its clinician employees.

10. **EXPORT CONTROL** – If Affiliate’s assignments include service with export-controlled information/technology, Affiliate agrees to comply with U.S. export control laws and regulations. Export-controlled information/technology cannot be disclosed to parties without authorization from the University’s office of the Vice President for Research. Authorization could include obtaining a license from the Department of State or Commerce prior to release of any export-controlled technology/information. Affiliate and University agree that they will not at any time take any action that would cause the University to be in violation of any such laws and regulations. Each party will work cooperatively to ensure compliance.

11. **INTELLECTUAL PROPERTY** – Affiliate hereby assigns to the ABOR all his or her right, title and interest to intellectual property created or invented by Affiliate in which the ABOR claims an ownership interest under its Intellectual Property Policy (the “ABOR IP Policy”). Affiliate agrees to promptly disclose such intellectual property as required by the ABOR IP Policy, and to sign all documents and do all things necessary and proper to effect this assignment of rights. Affiliate has not agreed (and will not agree) in consulting or other agreements to grant intellectual property rights to any other person or entity that would conflict with this assignment or with the ABORs’ ownership interests under the ABOR IP Policy.
12. INSURANCE AND LIABILITY COVERAGE – Affiliate understands that he or she is not provided insurance of any kind by the University for either injuries sustained or for liability incurred while serving in an Affiliate capacity. To the extent an Affiliate is acting in the course and scope of employment and/or authorization of their employer organization, it is expected that the Affiliate will be insured by their employer or sponsoring organization for liability incurred. An Affiliate also may be eligible for other insurance coverage from his or her employer or sponsoring organization if his or her service qualifies under the organization’s insurance programs. Alternatively, an Affiliate may seek coverage from his or her own personal insurance for medical expenses or for personal liability incurred.

13. TERMINATION – Affiliate agrees and acknowledges that as a Designated Campus Colleague, his or her Affiliate relationship is at-will and carries no promise of continuation and can be terminated at any time, without cause, without notice and without recourse.

The parties agree that this is the entire Agreement between them and that no Agreement, either oral or written, exists outside this Agreement regarding the Designated Campus Colleague services described in this Agreement.

On behalf of the Arizona Board of Regents

XXXXXX, President Date: Xxxxxxxxxxxxxx

Affiliate:

Name: DCC's Name
Title: DCC Title
Affiliate Institution (if applicable): Xxxxxxxxxxxxxxxxxxxxxxxx

Signature: Xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Date: Xxxxxxxxxxxxxxxxxxx

Affiliate: Please accept this agreement within 14 calendar days.
The University of Arizona is generously supported by Associates and other Designated Campus Colleagues who contribute their time, services and expertise to help the University accomplish its missions of teaching, research, service and outreach. As an Associate, you are not an employee of the University; however, you are required to follow all Arizona Board of Regents and University rules and policies regarding the conduct of University employees. With this Agreement, you may be eligible to take advantage of certain University services and privileges, as outlined at www.hr.arizona.edu/DCC. This Agreement also establishes standards and guidelines so that both you and the University understand the nature of your Associate relationship and the limitations of such a relationship.

The Arizona Board of Regents (hereafter either ABOR or the “University”) and DCC’s Name (hereafter “Associate”) agree to the following terms:

14. VOLUNTARY SERVICE – Associate agrees that he or she is providing services voluntarily to the University for Dept/College/Division/Unit solely for personal, civil, charitable or humanitarian purposes without promise or expectation of compensation, benefits or future employment with the University beyond any specified reimbursement agreements. Associate acknowledges that he or she is not an employee of the University and is not eligible for tenure or continuing status. If Associate becomes an employee of the University while serving as an Associate, he or she agrees to immediately notify Dept/College/Division/Unit and understands he or she may no longer provide services as an Associate or other Designated Campus Colleague.

15. AUTHORIZATION TO WORK/VOLUNTEER – If Associate is not a citizen or permanent resident of the United States, he or she affirms that he or she has the appropriate visa status that authorizes him or her to be present in the United States and allows him or her to participate in this type of service. Associate also affirms that he or she has submitted documentation to this effect to Dept/College/Division/Unit and agrees to immediately inform his or her departmental sponsor or Dept/College/Division/Unit business office of any change to his or her visa status.

16. ASSIGNMENT PERIOD – Associate will begin his or her assignment on start date, and it is anticipated that his or her assignment will end no later than end date. Associate understands that any extension of this assignment will require him or her to sign another agreement. This includes extensions that may occur at the beginning of each fiscal year.

17. REPORTING RELATIONSHIP – Associate will coordinate his or her activities through supervisor’s name and Dept/College/Division/Unit.

18. ASSIGNMENTS AND DUTIES – Understanding that Associate is providing services voluntarily, Associate nevertheless agrees to follow the directions of administrators, faculty or staff and to abide by ABOR and University policies and procedures while carrying out his or her Associate assignments. Associate will engage in the following activities: Duties and responsibilities entered on the DCC request.

19. NOTIFICATION OF POLICIES – Associate acknowledges that he or she has been given access to all University policies at http://policy.arizona.edu/ and understands that he or she has received and is expected to review the following University policies and take the following online training as a requirement of signing this Agreement:

   a. Equal Employment Policy at http://equity.arizona.edu/equal_employment_policy;
b. Nondiscrimination and Anti-harassment Policy at http://policy.arizona.edu/sites/default/files/Non-discrim-interim.pdf; and,

c. Preventing Sexual Harassment (online training program) at: http://equity.arizona.edu/education/harassment.

Associate also understands that he or she is required to successfully complete all applicable training required for performing the Associate activities.

20. EMAIL AND NET ID – Associate has been assigned a NetID, which is a personal identifier that provides access to online services, and an email account that serves as a mechanism for receiving official communications within the University. Associate acknowledges that he or she will receive any future Associate agreements or other official University business information through his or her assigned University email account. Associate also agrees to provide current contact information to the University so long as he or she is a University Associate. Personal information updates should be submitted online at: (URL HERE)

21. PRE-SCREENING AND BACKGROUND CHECKS – Associate hereby gives the University of Arizona permission to inquire into his or her education, references, driving record, employment, volunteer history, and criminal background. Associate understands that the University will only use this information for the purpose of this Agreement.

Associate understands that this relationship is contingent upon the successful outcome of criminal background checks or other prescreening checks for non-employees, if required, as described in the University's Pre-Employment Screening Policy available at: http://policy.arizona.edu/pre-employment-screening.

22. CLINICAL TEACHING – If Associate is participating in clinical teaching, Associate agrees that he or she has either signed or will sign a preceptorship agreement with the University or that Associate is employed by an institution that has executed a preceptor agreement on behalf of its clinician employees.

23. EXPORT CONTROL – If Associate’s assignments include service with export-controlled information/technology, Associate agrees to comply with U.S. export control laws and regulations. Export-controlled information/technology cannot be disclosed to parties without authorization from the University’s office of the Vice President for Research. Authorization could include obtaining a license from the Department of State or Commerce prior to release of any export-controlled technology/information. Associate and University agree that they will not at any time take any action that would cause the University to be in violation of any such laws and regulations. Each party will work cooperatively to ensure compliance.

24. INTELLECTUAL PROPERTY – Associate hereby assigns to the ABOR all his or her right, title and interest to intellectual property created or invented by Associate in which the ABOR claims an ownership interest under its Intellectual Property Policy (the “ABOR IP Policy”). Associate agrees to promptly disclose such intellectual property as required by the ABOR IP Policy, and to sign all documents and do all things necessary and proper to effect this assignment of rights. Associate has not agreed (and will not agree) in consulting or other agreements to grant intellectual property rights to any other person or entity that would conflict with this assignment or with the ABORs’ ownership interests under the ABOR IP Policy.

25. INSURANCE – Associate understands that, as a non-employee, he or she is not provided worker’s compensation insurance for injuries that might arise while providing service to the University, and it is recommended that Associates carry personal medical insurance to cover medical expenses that might be incurred. The University does provide, at no cost to the Associate, basic accident insurance coverage for treatment of injuries, but the
coverage is in excess of any other valid and collectible insurance available to Associate. The basic accident insurance is limited in scope and not recommended to be relied upon as the sole source of medical insurance by Associate.

26. **LIABILITY COVERAGE** – Associate understands that while acting within the scope of his or her service to the University and in an authorized capacity, he or she is eligible for liability insurance coverage from the State of Arizona self-insurance program described in Arizona Revised Statutes §41-621. This statutory insurance program provides legal defense for Associate and coverage for settlement or court awarded damages that result from claims or lawsuits related to Associate’s service to the University. No other University or state-sponsored employee medical, retirement or insurance plans apply to Associates.

27. **RELEASE** – Associate agrees to release the State of Arizona, Arizona Board of Regents, University of Arizona, and its officers, employees, agents, representatives and assigns, from any responsibility or liability for personal injury, including death, and for damage to or loss of property, that Associate may incur while providing service to the University.

28. **TERMINATION** – Associate agrees and acknowledges that as a Designated Campus Colleague, his or her Associate relationship is at-will and carries no promise of continuation and can be terminated at any time, without cause, without notice and without recourse.

The parties agree that this is the entire Agreement between them and that no Agreement, either oral or written, exists outside this Agreement regarding the Designated Campus Colleague services described in this Agreement.

**On behalf of the Arizona Board of Regents**

XXXXXXX, President Date: XXXXXXXXXXX

**Associate:**

Name: **DCC’s Name**

Signature: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX Date: XXXXXXXXXXXXXXXXXXXX

Associate: Please accept this agreement within 14 calendar days.
The University of Arizona is generously supported by Volunteers and other Designated Campus Colleagues who contribute their time, services and expertise to help the University accomplish its missions of teaching, research, service and outreach. As a Volunteer, you are not an employee of the University; however, you are required to follow all Arizona Board of Regents and University rules and policies regarding the conduct of University employees. With this Agreement, you may be eligible to take advantage of certain University services and privileges, as outlined at www.hr.arizona.edu/DCC. This Agreement also establishes standards and guidelines so that both you and the University understand the nature of your Volunteer relationship and the limitations of such a relationship.

The Arizona Board of Regents (hereafter either ABOR or the “University”) and DCC's Name (hereafter “Volunteer”) agree to the following terms:

29. VOLUNTARY SERVICE – Volunteer agrees that he or she is volunteering in Dept/College/Division/Unit solely for personal, civil, charitable or humanitarian purposes without promise or expectation of compensation, benefits or future employment with the University beyond any specified reimbursement agreements. Volunteer acknowledges that he or she is not an employee of the University and is not eligible for tenure or continuing status. If Volunteer becomes an employee of the University while serving as a Volunteer, he or she agrees to immediately notify Dept/College/Division/Unit and understands he or she may no longer provide services as a Volunteer or other Designated Campus Colleague.

30. AUTHORIZATION TO WORK/VOLUNTEER – If Volunteer is not a citizen or permanent resident of the United States, he or she affirms that he or she has the appropriate visa status that authorizes him or her to be present in the United States and allows him or her to participate in this volunteer experience. Volunteer also affirms that he or she has submitted documentation to this effect to Dept/College/Division/Unit and agrees to immediately inform his or her departmental sponsor or Dept/College/Division/Unit business office of any change to his or her visa status.

31. ASSIGNMENT PERIOD – Volunteer will begin his or her volunteer assignment on start date, and it is anticipated that his or her assignment will end no later than end date. Volunteer understands that any extension of this assignment will require him or her to sign another agreement. This includes extensions that may occur at the beginning of each fiscal year.

32. REPORTING RELATIONSHIP – Volunteer will coordinate his or her services through supervisor’s name and Dept/College/Division/Unit.

33. ASSIGNMENTS AND DUTIES – Understanding that Volunteer is providing services on a voluntary basis, he or she nevertheless agrees to follow the directions of administrators, faculty or staff and to abide by ABOR and University policies and procedures while carrying out his or her Volunteer assignments. Volunteer will engage in the following activities: Duties and responsibilities from DCC request

34. NOTIFICATION OF POLICIES – Volunteer acknowledges that he or she has been given access to all University policies at http://policy.arizona.edu/ and understands that he or she has received and is expected to review the following University policies and take the following online training as a requirement of signing this Agreement:

   a. Equal Employment Policy at http://equity.arizona.edu/equal_employment_policy;
b. Nondiscrimination and Anti-harassment Policy at [http://policy.arizona.edu/sites/default/files/Non-discrim-interim.pdf](http://policy.arizona.edu/sites/default/files/Non-discrim-interim.pdf); and,

c. Preventing Sexual Harassment (online training program) at: [http://equity.arizona.edu/education/harassment](http://equity.arizona.edu/education/harassment).

Volunteer also understands that he or she is required to successfully complete all applicable training required for performing the Volunteer assignments.

35. **EMAIL AND NET ID** – Volunteer has been assigned a NetID, which is a personal identifier that provides access to online services, and an email account that serves as a mechanism for receiving official communications within the University. Volunteer acknowledges that he or she will receive any future Volunteer agreements or other official University business information through his or her assigned University email account. Volunteer also agrees to provide current contact information to the University so long as he or she is a University Volunteer. Personal information updates should be submitted online at: [URL HERE]

36. **PRE-SCREENING AND BACKGROUND CHECKS** – Volunteer hereby gives the University of Arizona permission to inquire into his or her education, references, driving record, employment, volunteer history, and criminal background. Volunteer understands that the University will only use this information for the purpose of this Agreement.

Volunteer understands that this relationship is contingent upon the successful outcome of criminal background checks or other prescreening checks for non-employees, if required, as described in the University's Pre-Employment Screening Policy available at: [http://policy.arizona.edu/pre-employment-screening](http://policy.arizona.edu/pre-employment-screening).

37. **CLINICAL TEACHING** – If Volunteer is participating in clinical teaching, Volunteer agrees that he or she has signed or will sign a preceptorship agreement with the University or Volunteer is employed by an institution that has executed a preceptor agreement on behalf of its clinician employees.

38. **EXPORT CONTROL** – If Volunteer’s assignments include service with export-controlled information/technology, Volunteer agrees to comply with U.S. export control laws and regulations. Export-controlled information/technology cannot be disclosed to parties without authorization from the University's office of the Vice President for Research. Authorization could include obtaining a license from the Department of State or Commerce prior to release of any export-controlled technology/information. Volunteer and University agree that they will not at any time take any action that would cause the University to be in violation of any such laws and regulations. Each party shall work cooperatively to ensure compliance.

39. **INTELLECTUAL PROPERTY** – Volunteer hereby assigns to the ABOR all his or her right, title and interest to intellectual property created or invented by Volunteer in which the ABOR claims an ownership interest under its Intellectual Property Policy (the "ABOR IP Policy"). Volunteer agrees to promptly disclose such intellectual property as required by the ABOR IP Policy, and to sign all documents and do all things necessary and proper to effect this assignment of rights. Volunteer has not agreed (and will not agree) in consulting or other agreements to grant intellectual property rights to any other person or entity that would conflict with this assignment or with the ABORs’ ownership interests under the ABOR IP Policy.

40. **INSURANCE** – Volunteer understands that as a non-employee, he or she is not provided worker’s compensation insurance for injuries that might arise while providing volunteer service to the University, and it is recommended that volunteers carry personal medical insurance to cover medical expenses that might be incurred. The University does provide, at no cost to the volunteer, basic accident insurance coverage for
treatment of volunteer injuries, but the coverage is in excess of any other valid and collectible insurance available to the volunteer. The basic accident insurance is limited in scope and not recommended to be relied upon as the sole source of medical insurance by volunteers.

41. **LIABILITY COVERAGE** – Volunteer understands that while acting within the scope of his or her volunteer service to the University and in an authorized capacity, he or she is eligible for liability insurance coverage from the State of Arizona self-insurance program described in Arizona Revised Statutes §41-621. This statutory insurance program provides legal defense for volunteers and coverage for settlement or court awarded damages that result from claims or lawsuits associated with the volunteer's service to the University. No other University or state-sponsored employee medical, retirement or insurance plans apply to Volunteers.

42. **RELEASE** – Volunteer agrees to release the State of Arizona, Arizona Board of Regents, University of Arizona, and its officers, employees, agents, representatives and assigns, from any responsibility or liability for personal injury, including death, and for damage to or loss of property, that Volunteer may incur while providing volunteer service to the University.

43. **TERMINATION** – Volunteer agrees and acknowledges that as a Designated Campus Colleague, his or her Volunteer relationship is at-will and carries no promise of continuation and can be terminated at any time, without cause, without notice and without recourse.

The parties agree that this is the entire Agreement between them and that no Agreement, either oral or written, exists outside this Agreement regarding the Designated Campus Colleague services described in this Agreement.

**On behalf of the Arizona Board of Regents**

XXXXXXXXX, President Date: XXXXXXXXX

**Volunteer:**

Name: **DCC’s Name**

Signature: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX Date: XXXXXXXXXXXXXXXXXXX

If volunteer is under the age of 18, by signing below, I agree that my son/daughter/ward may participate in the activities described above, and I agree to the terms of the Release set forth above.

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Printed Name of Parent/Guardian if Volunteer is under the age of 18

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX Date: XXXXXXXXXXXX

Signature of Parent/Guardian if Volunteer is under the age of 18

Volunteer and Parent/Guardian: Please accept this agreement within 14 calendar days.
DCC Types and Category Codes

DCC Initiators and Approvers are expected to ensure that DCC relationships are created to provide legitimate services to the University and/or to have legitimate access to University services, systems, or applications in support of the University’s mission and are expected to end DCC relationships when services are completed.

<table>
<thead>
<tr>
<th>DCC Type/Category</th>
<th>Type Code</th>
<th>Category Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affiliates</td>
<td></td>
<td></td>
<td>Individuals from agencies, institutions, hospitals and clinics that directly contribute service to the academic or research mission of the University and have been afforded contractual affiliate status by the Office of the Provost. (see additional Affiliate categories below)</td>
</tr>
<tr>
<td>OLLI</td>
<td></td>
<td>AFO</td>
<td>Members of the Osher Lifelong Learning Institute which offers learning, teaching and social opportunities to seniors living in and around the Tucson, Marana or Green Valley areas.</td>
</tr>
<tr>
<td>Sr Academy</td>
<td></td>
<td>AFS</td>
<td>Members of the Arizona Senior Academy which is a charitable organization that brings together professional retirees in an intellectual setting to stimulate and foster continued productivity and creativity.</td>
</tr>
<tr>
<td>TGEN</td>
<td></td>
<td>AFT</td>
<td>Individuals from the Translational Genomics Research Institute (TGen) who directly contribute service to the academic research mission of the University and have been afforded affiliate status by a contractual arrangement with the Office of the Provost.</td>
</tr>
<tr>
<td>Associates</td>
<td>00920</td>
<td></td>
<td>Individuals such as unpaid faculty, principal investigators, visiting scholars and others who are regularly engaged in activities that directly support the University’s teaching and research mission.</td>
</tr>
<tr>
<td>Government Agency Staff</td>
<td>00972</td>
<td></td>
<td>Members of governmental agencies engaged in special projects, audits or investigations.</td>
</tr>
<tr>
<td>Grad Committee Members</td>
<td>00973</td>
<td></td>
<td>Members of Graduate dissertation committees who are not UA employees in any capacity.</td>
</tr>
<tr>
<td>Health Care Partners</td>
<td>00974</td>
<td></td>
<td>University Health Network professionals who fill the role of time approvers and payment requestors on behalf of the UA.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Code</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Independent Contractors</td>
<td>00975</td>
<td>Individuals who perform services as a “business entity” rather than as employee. The department determines what an independent contractor will do or what results will be produced, not how the work will be performed.</td>
<td></td>
</tr>
<tr>
<td>Inter-Institutional Faculty &amp; Staff</td>
<td>00976</td>
<td>Members of other institutions who are engaged in collaborative academic endeavors, including staff and faculty of ASU and NAU.</td>
<td></td>
</tr>
<tr>
<td>Pre-Hire</td>
<td>00950</td>
<td>Individuals who have accepted future UA Faculty, Classified Staff or Professional employment offers and require an UA email account (prior to their official start date) and/or access to systems or services on their hire date.</td>
<td></td>
</tr>
<tr>
<td>Religious Center Personnel</td>
<td>00977</td>
<td>Personnel of campus religious centers that serve the University community.</td>
<td></td>
</tr>
<tr>
<td>Temp Agency Employees</td>
<td>00978</td>
<td>Individuals who are contracted to perform services for the University through an approved outside employment or staffing agency.</td>
<td></td>
</tr>
<tr>
<td>Volunteers</td>
<td>00979</td>
<td>(see categories below)</td>
<td></td>
</tr>
<tr>
<td>Dept Volunteers</td>
<td>VD</td>
<td>Individuals who serve as docents, 4-H workers, event coordinators and other roles that support the University’s mission and do not meet the criteria for affiliate or associate appointments. Volunteers perform services for the University without coercion or expectation of compensation, benefits, or future employment.</td>
<td></td>
</tr>
<tr>
<td>Event Volunteers</td>
<td>VE</td>
<td>Non-UA employees who volunteer their services and expertise in support of a specified University campaign or event (i.e. United Way campaign).</td>
<td></td>
</tr>
<tr>
<td>4-H Volunteers</td>
<td>V4</td>
<td>Individuals who serve as mentors, coaches, guides or resources for Arizona 4-H youth programs.</td>
<td></td>
</tr>
<tr>
<td>UA Foundation Members</td>
<td>00970</td>
<td>Officers and staff of the UA Foundation, a non-profit corporation, who either fill the role of UA time approvers or are UA designated system users as described in the development services contract.</td>
<td></td>
</tr>
</tbody>
</table>

Field name for sub-categories: UA_WCC_POI_TYP_CAT
DCC EMAIL MESSAGES

EMAIL MESSAGES – PERSON WITH NO NETID

Three emails messages will be sent to individuals with new DCC relationships. The email messages:

• Are sent to the DCC’s personal email address (provided on the Campus Colleague Request)
• Are triggered after the transaction’s first Systems Control approval
• Provide the DCC’s with an emplid (message #1), a pin (message #2) and instructions for both creating a netid and accessing and accepting their DCC Agreement (message #3)

Note: the emplid and pin are required for the new DCC to establish a netid online.

DCC EMAIL #1 - NO NETID EXISTS UPON REQUEST INITIATION (EMPLID)

Important University of Arizona Account Information (1 of 2)

Dear <First Name Last Name >,

We are pleased to welcome you to the University of Arizona and are sending you this message to help expedite your transition into the University community.

Your information has been entered into the system and you can now establish a University of Arizona NetId. This is one of two messages you will receive with information on activating your NetId.

Your UA NetId provides a central authentication mechanism for a number of online services, and together with your EmplId, provides a "gateway" to University services and resources. The EmplId is used in lieu of your social security number as your personal identifier to ensure the privacy of your personal information.

Your assigned EmplId is XXXXXXXX.

To create a UA NetId you will need to copy and paste the following link into an internet browser: https://netid.arizona.edu. You will then enter your EmplId, your date of birth and a one-time PIN. Your PIN will be sent in a separate email. Please keep your EmplId in a safe place and wait until you receive the second email before initiating this process.

If you need assistance in creating NetId and email accounts, please contact the UITS 24/7 IT Support Center at 520-626-8324 or support@email.arizona.edu.

***Please do not reply to this message directly, as it was sent from an automated system. ***
DCC EMAIL #2 - NO NETID EXISTS UPON REQUEST INITIATION (PIN TO CREATE NETID)

Important University of Arizona Account Information (2 of 2)

Dear <First Name Last Name>,

This is the second of two messages you will receive to help you activate your University NetId.

You should have already received your assigned University EmplId, which together with your one-time personal PIN, allow you to create a University NetId.

Your assigned PIN is XXXXX.

To create a UA NetId you will need to copy and paste the following link into an internet browser: https://netid.arizona.edu and enter your EmplId, your date of birth (DOB) and your one-time PIN.

Once you have your NetId and password, log onto https://email.arizona.edu to set up your University email account. You are required to have an assigned University email address and all future communications will be directed to your official UA email address.

If you should need assistance with your NetId, please contact the UITS 24/7 IT Support Center at 520-626-8324 or support@email.arizona.edu.

***Please do not reply to this message directly, as it was sent from an automated system.***
DCC EMAIL #3 – NO NETID EXISTS UPON REQUEST INITIATION (PERSONAL INFO AND AGREEMENT)

University of Arizona - Designated Campus Colleague Request Pending - <Transaction ID>

Dear <First Name Last Name>,

The University of Arizona is generously supported by Designated Campus Colleagues (DCC) that contribute their time, services and expertise to help the University accomplish its missions of teaching, research, service and outreach.

A Designated Campus Colleague (DCC) Relationship with the University of Arizona has been requested. Please follow the link below to review and update your personal information and to accept your DCC agreement.

Click the following link to go directly to the request:

XXXXXXX.XXX.XXX

OR

1. Log onto UAccess Employee at http://uaccess.arizona.edu
2. Enter your NetID and password to access "Campus Colleague Relationships"
3. On the UAccess Employee page, click on the "Self Service" link under the main menu options.
4. Click on the Campus Colleagues folder and select the Campus Colleague Relationships link.
5. Complete your personal information and review the attached agreement (if applicable).
6. By clicking the "Accept" button, you are both confirming that you have completed the personal information sections accurately and to the best of your knowledge, you have reviewed any attached agreements and are applying your electronic signature indicating that you have accepted the terms of the relationship.

If you have questions about your DCC Relationship please contact the sponsoring department at the University of Arizona. The relationship must be accepted in order for you to have access to systems and services on campus.

For support and assistance with your NetID and password, please contact the 24/7 IT Support Center at (520) 626-TECH (8324)
EMAIL MESSAGES – PERSON WITH A NETID

Two email messages will be sent to DCCs with existing Netids. The email messages:

- Are sent to the DCC's personal email address
- Are triggered after the transaction’s first Systems Control approval
- Provide the DCC’s with both their existing NetId (message #4), and instructions for accessing and accepting their DCC Agreement (message #5).

DCC EMAIL #4 - NETID EXISTS UPON REQUEST INITIATION (NETID)

Important University of Arizona Account Information

Dear <First Name Last Name >

We are pleased to welcome you to the University of Arizona and are sending you this message to help expedite your transition into the University community.

Your new hire information has been entered into the system and our records indicate that you were previously assigned the following University NetId: XXXXXX

Your UA NetId provides a central authentication mechanism for a number of online services, and together with your EmplId (employee number), provides a "gateway" to University services and resources. The EmplId is used in lieu of your social security number as your personal identifier to ensure the privacy of your personal information.

If you also know your EmplId and the password that was previously established for this account, you may begin using your NetId and password to access university systems. If you need help retrieving your EmplId, resetting your password or reactivating your email account, please contact the UITS 24/7 IT Support Center at 520-626-8324 or support@email.arizona.edu.

All University employees are required to have an official University email address and all future communications will be directed to your official UA email address.

***Please do not reply to this message directly, as it was sent from an automated system.***
DCC EMAIL #5 - NETID EXISTS UPON REQUEST INITIATION (PERSONAL INFO AND AGREEMENT)

University of Arizona - Designated Campus Colleague Request Pending - <Transaction ID>

Dear <First Name Last Name>,

The University of Arizona is generously supported by Designated Campus Colleagues (DCC) that contribute their time, services and expertise to help the University accomplish its missions of teaching, research, service and outreach.

A Designated Campus Colleague (DCC) Relationship with the University of Arizona has been requested. Please follow the link below to review and update your personal information and to accept your DCC agreement.

Click the following link to go directly to the request:

XXXXXXX.XXX.XXX

OR

1. Log onto UAccess Employee at http://uaccess.arizona.edu
2. Enter your NetID and password to access "Campus Colleague Relationships"
3. On the UAccess Employee page, click on the "Self Service" link under the main menu options.
4. Click on the Campus Colleagues folder and select the Campus Colleague Relationships link.
5. Complete your personal information and review the attached agreement (if applicable).
6. By clicking the "Accept" button, you are both confirming that you have completed the personal information sections accurately and to the best of your knowledge, you have reviewed any attached agreements and are applying your electronic signature indicating that you have accepted the terms of the relationship.

If you have questions about your DCC Relationship please contact the sponsoring department at the University of Arizona. The relationship must be accepted in order for you to have access to systems and services on campus.

For support and assistance with your NetID and password, please contact the 24/7 IT Support Center at (520) 626-TECH (8324)

CONTACT INFORMATION

If you are experiencing problems or just have questions about the Manager Self Service Campus Colleague Requests, please contact the Workflow Administrator.

WHO TO CALL????

E-mail is the best communication method for contacting the Workflow Administrator. The contact information is:

1. Abbie Montenegro – abbiem@email.arizona.edu
   ○ Phone: 520-235-7387