

**GENERAL INFORMATION**

- The [OSRAA Labor Distribution Form](#) must be completed for ALL Labor Distributions (LD's) affecting sponsored awards, **including future distributions, regardless of whether OSRAA approval is needed.**
- Future payroll distributions and others not needing OSRAA approval may be processed by the Business Center once the LD form is completed and authorized through DocuSign.
- The LD form is in Excel format and multiple lines may be inserted or unhidden, as needed. If multiple LD forms are used for any reason, all approval signatures are required on each form.
- Each labor distribution percentage must equal 100%. If spreadsheet calculates a different percent, revise the line percentage(s) so that the total is 100%.
- The LD form must be submitted via DocuSign – see instructions beginning on page 4 of this document.
- Once approved, all LD forms must be filed in the Payroll role in Nolij. If the LD is correcting a PAR form, the LD form must also be attached to the PAR form and filed in the Reporting role in Nolij.
- For additional information, including justification examples, see [Labor Distribution Guidelines](#), [Labor Distribution Policy](#) and [Labor Distribution FAQs](#).

**PAYROLL INSTRUCTIONS FOR PAGE 1 OF FORM****Enter Heading Information**

- Enter Employee ID (do not include dashes)
- Enter employee name (last name first)
- Enter Position # and Suffix
- Enter the name and phone # of the preparer

**Complete Distribution Box**

- Enter the current distribution. **This is the existing distribution for the period you are revising.**
- Enter the Start date -the month and year- the distribution change is to begin. This will change the labor distribution from this date forward. If you want to redistribute only specific months you can enter the month(s) and the word **ONLY** (i.e. Jan - March, 2016 only)
- Complete additional Labor Distribution form for Earn Codes with different distributions, or to make additional distribution changes for new time periods.
- Enter percent, index, account code, and activity code (if needed) for the revised distribution. Complete one line for each FOPAL. Distribution must total 100%.
- If you want amounts to display, enter the total amount. The spreadsheet will calculate the amounts for each index.
- If you want hours to display, enter total hours. The spreadsheet will calculate the hours for each index.

**JUSTIFICATION/EXPLANATION**

- Justifications must include sufficient detail to document the circumstance of the LD and appropriateness to the new index. Justifications stating “to move salary” or “to correct an error” will not be accepted.
- If the LD is to add, delete or change activity code only, indicate in justification box "activity code change only."
- If the LD is to update an individual’s payroll to a newly-created project index due to a change in budget year or F&A rate, indicate this in justification box.
- For all other LDs, explain why the salary was charged incorrectly to the original index and how the salary directly relates to the receiving project. The new salary distribution must match where the individual worked during the period(s) affected by the redistribution.
- If the transfer is more than 90 days after the end of the month in which the payroll charge posted, include an explanation as to why salary was not transferred in a timely manner.
- If the LD will REDUCE key personnel project effort for the current project budget period by 25% or more, provide a detailed explanation as to whether this is a temporary change in effort to be made up during the project period or if it will reduce the committed effort for the overall project. Also confirm if the revision will change the project’s scope of work.
- If the LD will INCREASE key personnel project effort for the current project budget period by 25% or more, provide a detailed explanation as to whether or not this will constitute a change in the project’s scope of work. Also note which budget categories will be reduced to cover the increased salary.

**NOTE THAT A CHANGE IN SCOPE REQUIRES SPONSOR APPROVAL REGARDLESS OF EFFORT**

- **Example of minor change in key personnel effort (<25%):**  
Proposal indicates 20% effort of key personnel  
After the proposal is awarded, key personnel effort is reduced to 16%  
Calculation:  $(20\% - 16\%) / 20\% = 20\%$  change in effort
- **Example of major change in key personnel effort (>25%):**  
Proposal indicates 20% effort of key personnel  
After the proposal is awarded, key personnel effort is reduced to 10%  
Calculation:  $(20\% - 10\%) / 20\% = 50\%$  change in effort

**AUTHORIZATION**

- Digital signatures from authorized approvers will be captured in DocuSign.
- Official designee is acceptable for Dean, Director or Department Head.
- Official designee is acceptable for Principal Investigator (PI), only if designee has knowledge of and can certify to the statements regarding key personnel effort and change to scope of work.
- E-mail approval from the PI is acceptable if it contains all of the labor distribution detail and certification statements regarding key personnel effort and change to scope of work. The PI’s approval e-mail must be uploaded to DocuSign as back-up documentation to the LD form.

**Approvals required on all forms:**

- **Principal Investigator (PI)** – must approve all LD forms for sponsored awards in order to certify whether the distribution affects the scope of work or revises key personnel project effort by 25% or more. *If either of these apply, additional explanation is required – see Justification section of these instructions.*
- **Business Center/Department Authorizer** - personnel in Business Center or Department authorized to approve LDs. *Authorized signer and preparer cannot be the same individual.*

**Additional Approvals that may be required:**

- **Dean, Director or Department Head** – must sign all LD forms for distribution of PI salary (**a person may not authorize their own LD form**)
- **Office for Sponsored Research and Award Administration (OSRAA)** – Approval is needed for LD forms that meet any of the following criteria:
  - 90 days or more past initial payroll charge, including prior year LDs
  - revises key personnel effort by 25% or more for the project budget period
  - any change of effort that affects the project scope of work

**SUBMISSION AND FILING**

All LD forms must be submitted for approvals through DocuSign - see instructions beginning on page 4.

**For LD forms that require OSRAA approval:**

- Add applicable authorizers and OSRAA as Recipients in DocuSign
- Include the text “Labor Distribution - employee's name” as the DocuSign subject so OSRAA and other approvers can readily identify each request form
- Once form is approved by OSRAA and completed in DocuSign, download LD and file in the Nolij Payroll role and under the Nolij Reporting role with the revised PAR form, if applicable.

**For LD forms that do not require OSRAA approval:**

- Add applicable authorizers as Recipients in DocuSign
- Once signed by all approvers and completed in DocuSign, download LD and file in the Nolij Payroll role and under the Nolij Reporting role with the revised PAR form, if applicable.

**NOTE:** If pay is approved for redistribution after a PAR form has been signed, the PAR must be revised, recertified and filed in Nolij. See resources below for more information.

**ADDITIONAL GUIDANCE**

[Labor Distribution FAQs](#)

[Labor Distribution and Effort Reporting policies and guidelines](#)

DocuSign Labor Distribution Instructions begin on next page.

For questions, please contact OSRAA at [OSRAA@oregonstate.edu](mailto:OSRAA@oregonstate.edu) or 7-4933.

**DocuSign Labor Distribution Template – Sender Instructions**

**NOTE:** OSRAA instructions and the Labor Distribution spreadsheet form, which should be used for Labor Distribution submission, are available at the OSRAA Forms and Rates page: [Labor Distributions](#). Please follow the OSRAA instructions, completing the spreadsheet before beginning the DocuSign process described below.

**Prepare the Distribution Form**

Prepare the Labor Distribution document, using the OSRAA spreadsheet. When you have finished inserting the data, “print” it using *Microsoft Print to PDF*, or any other tool that will save the file to one of your directories. This will be the document you upload into DocuSign.

Remember that a separate DocuSign envelope must be created and submitted for each Labor Distribution Form.

**The Five Major Steps**

- I. Log into DocuSign
- II. Upload your Document
- III. Apply the Template
- IV. Add Recipients and Envelope Label; Check tags
- V. Send

**Log on to DocuSign**

Navigate to the OSU DocuSign home page, [DocuSign.OregonState.edu](http://DocuSign.OregonState.edu). It looks like:



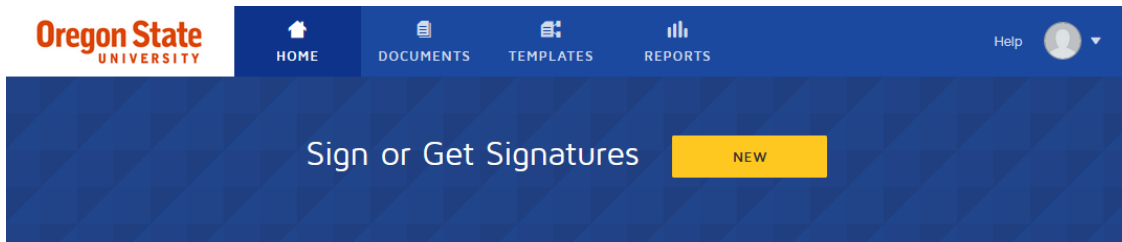
Click the “Sign in to DocuSign” link shown above.  
Log in using your ONID credentials.

A screenshot of the DocuSign login interface. It features a white background with a blue border. At the top, there is a 'USERNAME' label above a white input field. Below that is a 'PASSWORD' label above a yellow input field. A checkbox labeled 'This is a public kiosk' is located below the password field. To the right of the checkbox are two small red links: 'Need help?' and 'Service status'. At the bottom of the form is a large orange button labeled 'LOGIN'.

**Upload the Document**

- Remember that only one Labor Distribution may be submitted in each DocuSign envelope.

The DocuSign Home page will be displayed. Here is the top section of the page:



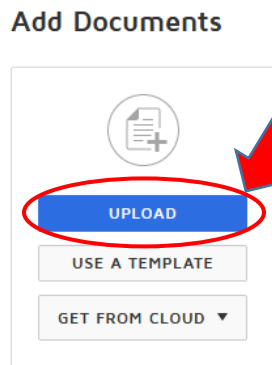
Click the “New” button, then ...  
choose “Send a Document”:



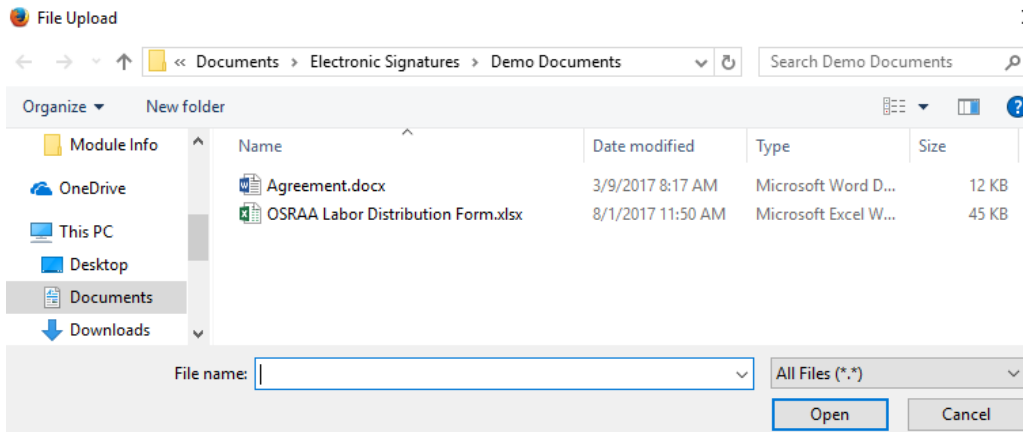
The system will display the “Upload a Document and Add Recipients” dashboard:



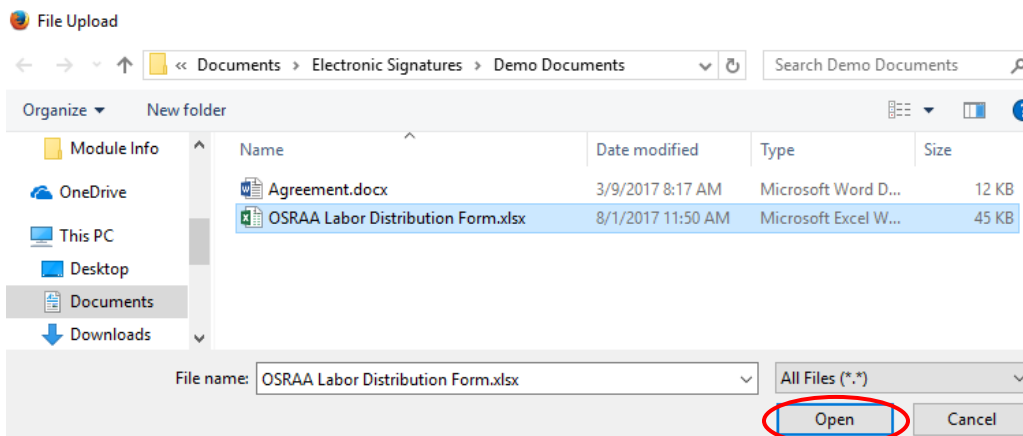
Under “Add Documents”, choose “Upload”:



Your browser’s “File Upload” screen will be displayed:



Browse to your document. Click on it to select it. Then, choose “Open”



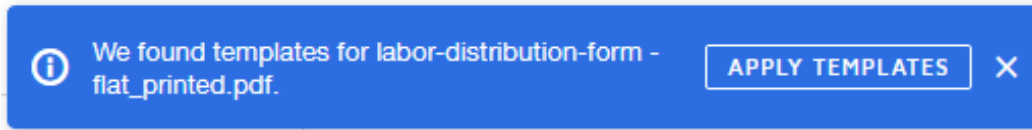
DocuSign will upload the document you have selected.

**Apply the template**

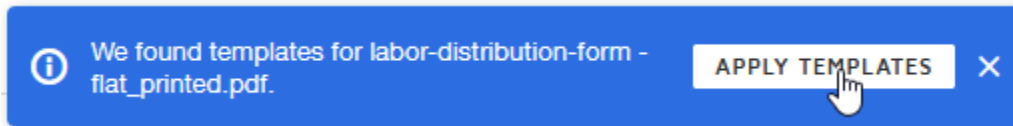
As it is uploading the document, DocuSign will present you with *one of the two following* options for locating your template:

**Option 1: DocuSign finds templates:**

If DocuSign finds templates that are likely to match your document, it will display the following message:



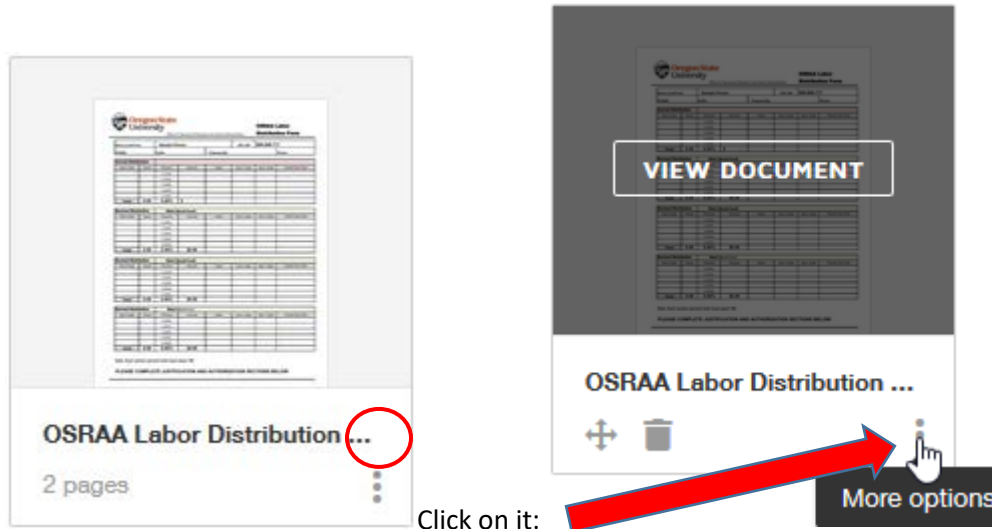
Choose "Apply Templates":



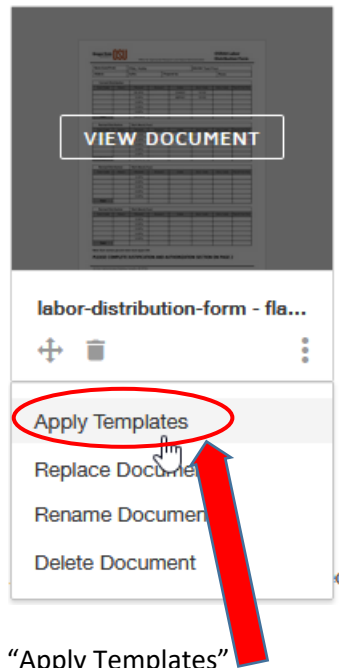
**Or, Option 2: DocuSign does not find a likely template:**

If DocuSign does not present the messages shown above, locate the template as follows.

1. First, notice the ellipsis on the icon showing the image of the document you just uploaded:



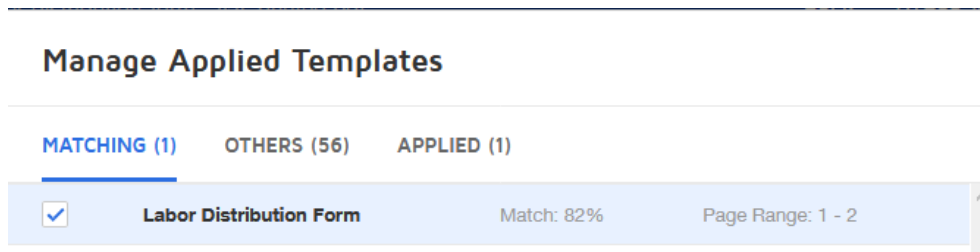
2. DocuSign will open the "More Options" menu shown on the next page:



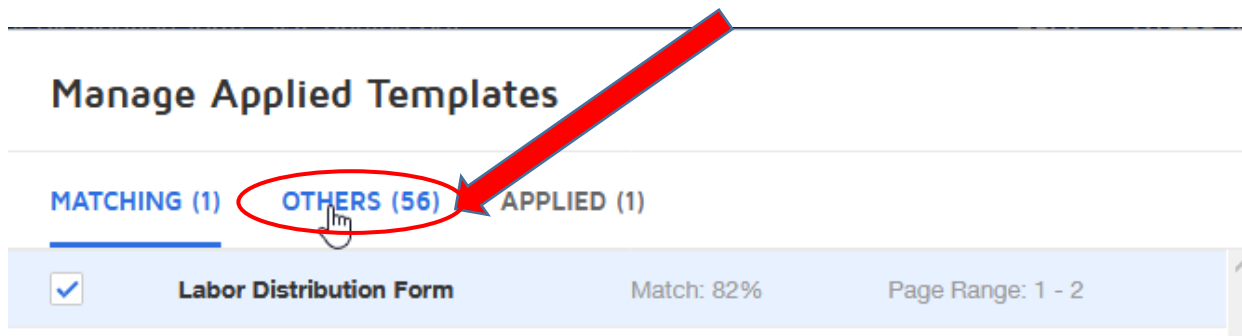
3. Choose "Apply Templates"

**Select the Template**

DocuSign will show the template it has applied, or a list of templates that may be applicable:



If you do not see the one you want, click the "Others" tab



The system will display a list of templates available for your use. Choose "Labor Distribution – OSRAA". The Search Bar may be helpful if you have access to many templates:

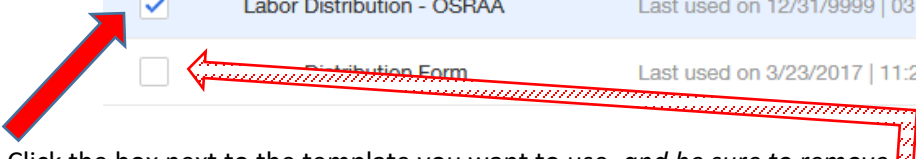


### Manage Applied Templates

MATCHING (1)   **OTHERS (56)**   APPLIED (1)

Q labor x SEARCH

<input checked="" type="checkbox"/>	Labor Distribution - OSRAA	Last used on 12/31/9999   03:59:59 pm
<input type="checkbox"/>	Distribution Form	Last used on 3/23/2017   11:20:05 am

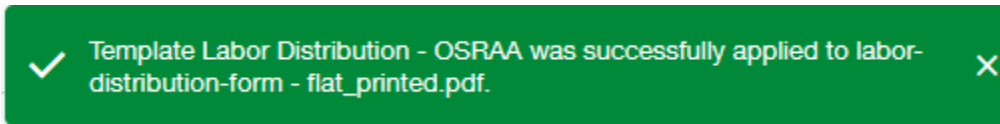


Click the box next to the template you want to use, and be sure to remove any other checkmarks (also by clicking on the checkbox – it is a toggle)

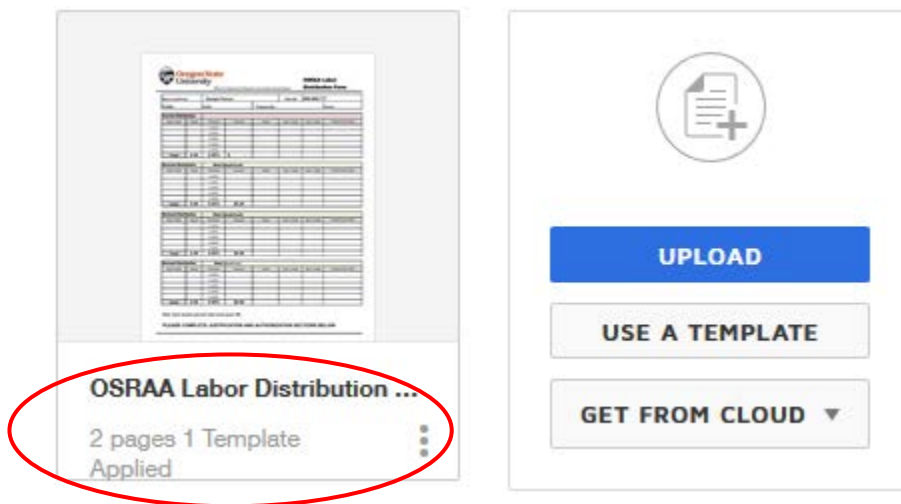
When the desired template is selected, press the “Update” button at the bottom of the window:



DocuSign presents a message when the template has been successfully applied:



DocuSign has now changed the “Add Documents” area of your screen. It should now look as shown below:



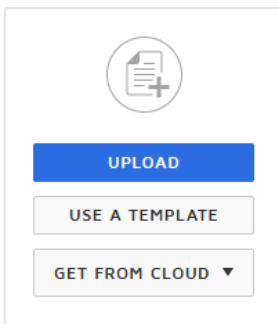
Notice the information below the image of your document. It should show:

1. Your document Name
2. The correct number of pages in the document
3. And, that **ONE** template has been applied.

If anything is incorrect discard the document, using the option under “Other Actions” at the upper right of the screen, and begin again.

**Additional Supporting Documents**

Additional, supporting documents may be uploaded by using the “Document Upload” icon:



which is shown adjacent to the icon of your initial form. You may add several items, as a new button will open after each addition.

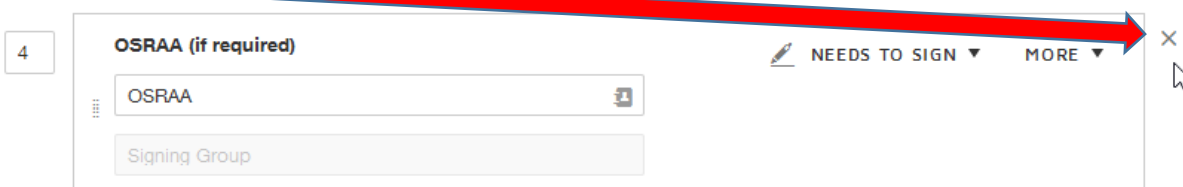
**Add Recipients**

Worker’s Name: The first recipient’s box has a special function. Whatever name you put in the Worker’s Name field, will become part of the envelope description. That will enable this envelope to be easily distinguished from all the other Labor Distribution envelopes.

Put the worker’s name in the first recipient’s name field, but **do not change** the email address from [DocuSign.FormsMgr@oregonstate.edu](mailto:DocuSign.FormsMgr@oregonstate.edu). If you have inadvertently inserted the worker’s email address, you can manually change it back to DocuSign.FormsMgr. (On the other hand, if you want the worker to have a copy of the Labor Distribution, put the worker’s email address in the email field.)

Fill in the recipient information for each necessary recipient.

If a recipient is to be omitted, remove them from the list by choosing the “x” on the right outside their recipient box



If you remove a recipient, the system will display the following message:

**Recipient has fields**

By deleting this recipient, you will also delete their fields.  
Would you like to delete the recipient and fields?



Click the Delete button

If the Labor Distribution you are submitting is for a **prior** year, you must add another recipient.

- Click the “Add Recipient” Button. A new recipient box will be opened.
- Verify that the “Signing Order” number is higher than the “Signing Order” number for OSRAA.
- Put the word “Paymaster” in the top box.
- Select the “Person” icon to the right of the name field. The contacts search will open.
- Type the word “paymaster” into the search field and press enter.
- Click on the Paymaster (Signing Group) which is displayed. The system will fill in the recipient name and email.
- Change the recipient type to “CC Receives A Copy”.
- When you are finished the recipient box should appear as follows:

**Now, check the document tags**

Press “Next” in the upper right corner of the screen:



The system will display the form you have uploaded:

		OSRAA Labor Distribution Form	
Office for Sponsored Research and Award Administration			
Name (Last/First):	Pitts, Hollie	OSU ID#	
POSN #: Test	Suffix:	Prepared by:	Phone:

At the bottom of the second page, the form will show the tags (Document Fields) from the template:

<b>Principal Investigator Authorization:</b>			
I certify that the distribution of labor <span style="background-color: yellow;">Select</span> reduce or increase Key Personnel effort 25% or more for the project budget period on any of the above sponsored award			
I certify that the distribution of labor <span style="background-color: yellow;">Select</span> change the project scope of work on any of the above sponsored awards.			
<b>Principal Investigator Name:</b>		<span style="background-color: yellow;">Full Name</span>	
<b>Principal Investigator Signature:</b>		<span style="background-color: yellow;">Sign</span> ↓	<span style="background-color: yellow;">Date Signed</span>
Authorization	Printed Name	Signature	Date
Business Center or Department	<span style="background-color: lightblue;">Full Name</span>	<span style="background-color: lightblue;">Sign</span> ↓	<span style="background-color: lightblue;">Date Signed</span>
Dean, Director, Dept. Head 1	<span style="background-color: lightcoral;">Full Name</span>	<span style="background-color: lightcoral;">Sign</span> ↓	<span style="background-color: lightcoral;">Date Signed</span>
OSRAA 2	<span style="background-color: lightgreen;">Full Name</span>	<span style="background-color: lightgreen;">Sign</span> ↓	<span style="background-color: lightgreen;">Date Signed</span>

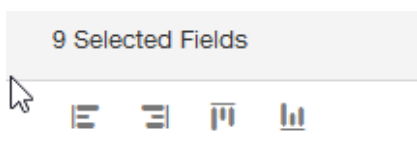
You may make any necessary adjustments to the positions of the tags either, individually (select the tag by clicking on it):

Business Center or Department	<span style="background-color: lightblue;">Full Name</span>	<span style="background-color: lightblue;">Sign</span> ↓	<span style="background-color: lightblue;">Date Signed</span>
Dean, Director, Dept. Head	<span style="background-color: lightcoral;">Full Name</span>	<span style="background-color: lightcoral;">Sign</span> ↓	<span style="background-color: lightcoral;">Date Signed</span>

or, as a group by using your mouse to drag a box around them:

Authorization	Printed Name	Signature	Date
Business Center or Department	<span style="background-color: lightblue;">Full Name</span>	<span style="background-color: lightblue;">Sign</span> ↓	<span style="background-color: lightblue;">Date Signed</span>
Dean, Director, Dept. Head 1	<span style="background-color: lightcoral;">Full Name</span>	<span style="background-color: lightcoral;">Sign</span> ↓	<span style="background-color: lightcoral;">Date Signed</span>
OSRAA 2	<span style="background-color: lightgreen;">Full Name</span>	<span style="background-color: lightgreen;">Sign</span> ↓	<span style="background-color: lightgreen;">Date Signed</span>

Move selected tags with your keyboard arrow keys, or the alignment keys at the top of the right panel:



**Send your Document**

When you are satisfied with the placement of the tags, press “Send” in the upper right corner of the screen:




**Finish Recording the Labor Distribution**

As the originator of the Labor Distribution you will be notified when the document has been completed, which means that it has been signed by all parties. It is now time to finish recording the Labor Distribution outside of DocuSign.

It is your responsibility to:

- input the labor distribution into Banner, and
- download the document and put it into the appropriate Nolij folder.

You may download the file by choosing:  in the email notification. When the document is displayed, you will see this series of icons at the top of the document display:



The left icon is the download icon.

Instead, if you are in the DocuSign Dashboard, the document will be listed under the “Documents” tab. When it has a “Completed” status, single click on the document name to open it. Then use the download icon in the upper right corner of the document header information (above recipients)

