

PTOL CONTRACT ENTRY AND APPROVAL

QUICK START

Purpose: This guide summarizes the new workflow for submitting and approving PTOL contracts in Colleague.

WHO DOES WHAT AND WHERE?

Role	Responsibility
Administrative Assistant	Enter PTOL contracts in Colleague (XFCONC)
Chair / Director	First approval (XFCONA)
Dean	Second approval (XFCON2)
Fiscal Services	Third approval for non-standard amounts only (XFCON3)
HR / Payroll	Final processing for payment

STANDARD WORKFLOW

1. Department confirms teaching assignments
2. Assistant enters contracts
3. Chair / Director approves
4. Dean approves
5. Fiscal approves exceptions only
6. HR / Payroll processes payment

IMPORTANT RULES

- Use this process for compensation directly tied to a course.
- Use Original contract for new assignments.
- Use Revision only for compensation changes.
- If course, term, or GL is incorrect, cancel and submit a new Original contract.
- Non-standard amounts require explanation and additional approval.

AVOID DELAYS – CHECK BEFORE SUBMITTING

- Instructor assigned to course
- Correct course section selected
- Correct GL entered
- Correct amount selected
- Deadlines met

PTOL CONTRACT ENTRY AND APPROVAL

OVERVIEW

The Administrative Assistant in the academic department is responsible for compiling and submitting data for PTOL contracts. Once the instructor and course assignment have been confirmed, the required data for each contract includes:

- GL Department/Cost Center (six digits)
- Contract Type (for Object Code)
 - Adjunct 51022
 - Overload Faculty/Staff 51023
- Service Provided
 - Course
 - Course Field Experience
- Amount
 - Standard
 - Non-Standard
- Full GL Number (17 digits)

Once this information has been reviewed and confirmed by the department chair/school director, the Administrative Assistant shall submit the contract data into Colleague. The information must be approved by the Department Chair/School Director, Dean, and, in some cases, the Vice President for Finance and Administration. Once the approval process is complete, the contract will be processed by Human Resources/Payroll.

STEP 1: SUBMITTING CONTRACT DATA

Once the Administrative Assistant has confirmed the PTOL contract data with the Department Chair/School Director, submit the data as follows:

LOG INTO COLLEAGUE

You may access Colleague through the **Useful Links** page.

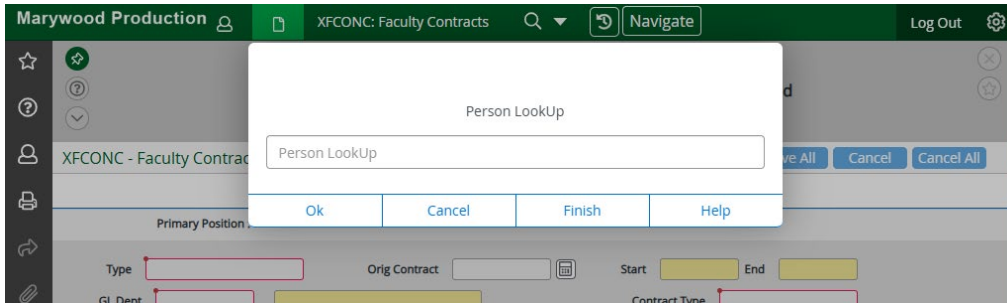
1. Navigate to <https://www.marywood.edu/depts/IT/useful-links>.
2. Click the yellow box titled **“Useful Links for Employees”**.
3. Click **Colleague Production 5.25 (New UI)** from the list.
4. Enter your Marywood credentials. They are the same as what you use to access your PC, Self-Service, and Brightspace.

ACCESSING THE XFCONC FORM

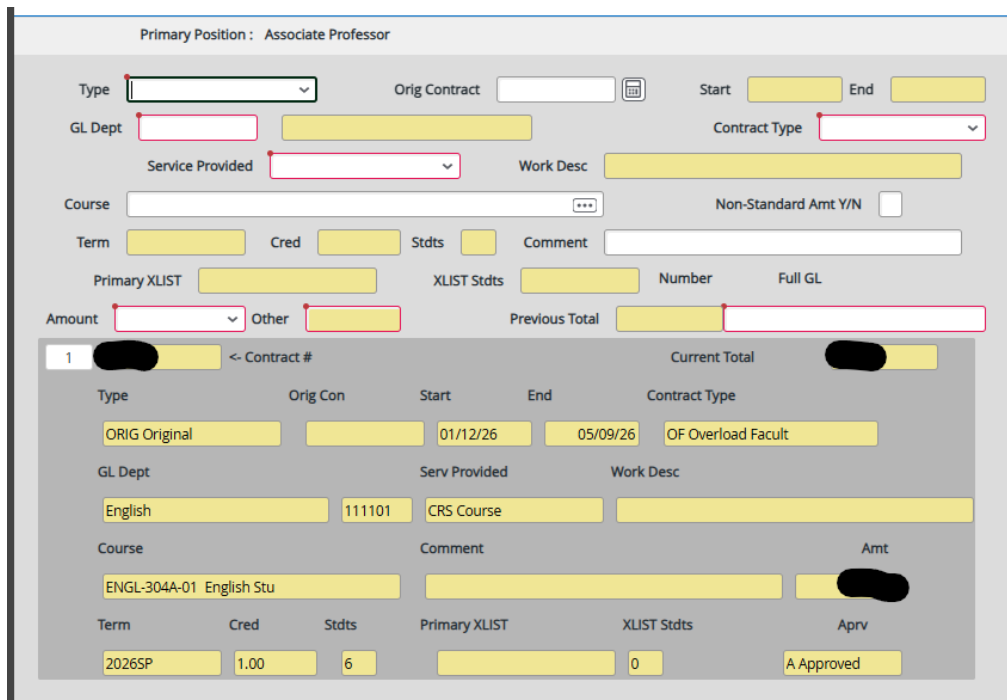
Once you’ve signed in, click the Envelope icon for **“Forms Search”** and type **XFCONC**.

PTOL CONTRACT ENTRY AND APPROVAL

A pop-up window titled “Person Lookup” will appear for you to enter a Marywood ID, or name (Last Name, First Name) of the instructor. Then click OK.



You will see two screens, the top section (light gray) is where you will enter a new contract. The bottom section (dark gray) shows the most recently-entered contract. See instructions on page 14 of this document regarding accessing previous contracts.



PTOL CONTRACT ENTRY AND APPROVAL

ENTERING AN ORIGINAL CONTRACT

The white fields are editable and the ones outlined in red are required. The yellow fields are “inquiry-only” and will populate based on data entered in the required fields.

- **Type:** the choices are “original” and “revision”. This section will review original contracts. See the section on page 4 regarding revisions.
- **GL Dept:** refers to the six-digit GL number (or cost center) that the instructor is paid from.
- **Contract Type:** choose Overload Faculty/Overload Staff/Adjunct-Seasonal
- **Service Provided:** choose “course” or “course field experience”.
- **Course:** Enter the term code, course number, and section for the course with spaces between each (e.g. 2026SP ENGL 160 01). The course will appear in a pop-up window. Check to ensure the correct instructor is assigned as the instructor and that the course is listed as ACTIVE. If so, single-click the course and click the blue “open” button. The term, credits, students enrolled, start date, end date, and cross-listed course information (if applicable) will auto-populate in the yellow boxes.
- **Non-Standard Amount:** refers to whether the amount for the course is “standard” or “non-standard” (see Standard Amounts, page 12). If the amount is standard, leave this box blank or type N. If the amount is a non-standard amount, type Y in this box.
- **Comment:** primarily used for non-standard amount contracts to explain the rationale for the non-standard amount (28-character limit).
- **Amount:** a drop-down menu containing the standard amounts for PTOL contracts.
- **Other:** a text field to enter the non-standard amount (can only type in this field if Y is selected in the box above).
- **Full GL:** refers to the full 17-digit budget number for the contract.

Once all of the required fields are completed, click the blue button for “save” and then the blue button for “update”. Repeat the process for any additional contracts.

ENTERING A REVISION CONTRACT

A revision contract is only submitted to make a correction to an amount on an original contract (an increase or decrease). Follow these steps to submit a revision to an original contract.

- **XFCONC:** Access the XFCONC screen and the record for the instructor whose original contract you are revising using the method described on page 3.
- **Type:** Choose “revision” from this dropdown.
- **Orig Contract:** Enter the original contract number (typically four or five digits) in this box. The previously entered data for the original contract will populate.
- **Non-Standard Amount:** Enter a “Y” in this box to enable the “other” box.
 - o To increase the amount of the original, enter the amount that should be added to the original in the “other” box.

PTOL CONTRACT ENTRY AND APPROVAL

- To decrease the amount of the original, enter a { - } and the amount that should be subtracted from the original.
- Then enter the full 17-digit GL number, click save, and click update.

Note: If an original contract contains errors in any other field (course, term, GL, etc.), the contract must be cancelled and a new original contract must be submitted.

STEP 2: GENERATING A REPORT OF CONTRACTS FOR APPROVAL #1

Once the Administrative Assistant has submitted the PTOL contract data for their department/school, they will generate a report of submitted contracts for approval by the department chair/school director.

LOG INTO THE REPORT SERVER

You may access The Report Server through the **Useful Links** page.

1. Navigate to <https://www.marywood.edu/depts/IT/useful-links>.
2. Click the yellow box titled **“Useful Links for Employees”**.
3. Under **“Reporting”**, click **Marywood Report Server** from the list.
4. Enter your Marywood credentials. They are the same as what you use to access your PC, Self-Service, and Brightspace.

ACCESSING THE REPORT

Navigate to the folder named Faculty Information Reporting. Click the report titled **“PTOL Contracts by Approval Status”**.

Query the report using the following parameters:

1. **Contract Start From Date:** Select the earliest term start date for the series of contracts submitted.
2. **Contract Start To Date:** Select the latest term end date for the series of contracts submitted.
3. **GL:** Select the cost center(s) for the department/school.
4. **Approval Status1:** Select **“No Status”**.
5. **Approval Status2:** Select **“No Status”**.
6. **Approval Status3:** Select **“No Status”**.
7. Click the **View Report** button on the right-hand side.

The report will display on the screen. To download and share the report, click the floppy disk icon in the middle of the screen and select Excel. Email this file to the department chair/school director.

PTOL CONTRACT ENTRY AND APPROVAL

STEP #3: FIRST APPROVAL – DEPARTMENT CHAIR/SCHOOL DIRECTOR

Once the department chair/school director receives the report of contracts awaiting approval, they will log into Colleague to review and act on each contract for each instructor.

LOG INTO COLLEAGUE

You may access Colleague through the **Useful Links** page.

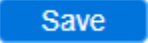

1. Navigate to <https://www.marywood.edu/depts/IT/useful-links>.
2. Click the yellow box titled **“Useful Links for Employees”**.
3. Click **Colleague Production 5.25 (New UI)** from the list.
4. Enter your Marywood credentials. They are the same as what you use to access your PC, Self-Service, and Brightspace.

USING THE XFCONA FORM

1. Type the form mnemonic (**XFCONA**) in the **Form Search** text box.
2. A **Person LookUp** dialog box displays.
3. Refer to the report you received and type an instructor’s ID or name (Last Name, First Name) and click OK.
4. You will see the **Search Results** panel. Single click in the instructor’s record and click OK.
5. The instructor’s most recently entered contract will appear. Review the data for accuracy.
6. You will have three choices from the drop down in the bottom corner – “A Approved; D Denied, or C Cancelled”.
 - If the information is accurate, select “A Approved” from the dropdown menu. If the instructor has multiple contracts, the form will automatically cycle to the next contract immediately after you make a choice on the first contract.
 - If the information is NOT accurate, select “C Cancelled”. A new original must be submitted by the administrative assistant.
 - If you do not approve of the assignment for the instructor, select “D Denied”.

The screenshot shows the XFCONA form interface. At the bottom right, the 'Approval' dropdown menu and the 'Approval Status By' text box are highlighted with a red border, indicating the area where the user would select an approval status and enter their name.

PTOL CONTRACT ENTRY AND APPROVAL

7. Once all contracts have been reviewed for the instructor and the status marked, click  and  to complete the process. Your name will be stamped in the “Approval Status By” box.
8. Repeat the above steps to mark the status of contracts for other instructors.
9. Note: If a REVISION has been submitted for an ORIGINAL contract and the ORIGINAL has not yet been reviewed, the REVISION will appear as the first contract for the instructor. Important: in this case, the REVISION AND THE ORIGINAL must be approved before the next approval.

STEP 4: GENERATING A REPORT OF CONTRACTS FOR APPROVAL #2

Once the department chair/school director has approved the contracts for their unit, the Special Assistant to the Dean will generate a report of contracts for approval by the dean.

LOG INTO THE REPORT SERVER

You may access The Report Server through the **Useful Links** page.

1. Navigate to <https://www.marywood.edu/depts/IT/useful-links>.
2. Click the yellow box titled “**Useful Links for Employees**”.
3. Under “Reporting”, click **Marywood Report Server** from the list.
4. Enter your Marywood credentials. They are the same as what you use to access your PC, Self-Service, and Brightspace.

ACCESSING THE REPORT

Navigate to the folder named Faculty Information Reporting. Click the report titled “PTOL Contracts by Approval Status”.

Query the report using the following parameters:

1. **Contract Start From Date:** Select the earliest term start date for the series of contracts submitted.
2. **Contract Start To Date:** Select the latest term end date for the series of contracts submitted.
3. **GL:** Select the cost center(s) for the department/school.
4. **Approval Status1:** Select “Approved”.
5. **Approval Status2:** Select “No Status”.
6. **Approval Status3:** Select “No Status”.
7. Click the **View Report** button on the right-hand side.

The report will display on the screen. To download and share the report, click the floppy disk icon in the middle of the screen and select Excel. Email this file to the dean.

PTOL CONTRACT ENTRY AND APPROVAL

STEP #5: SECOND APPROVAL – COLLEGE DEAN

Once the department chair/school director has completed their review of the contracts for their area, the Special Assistant to the Dean will follow the steps above to generate the report for their College. The Dean will log into Colleague to approve each contract for each instructor.

LOG INTO COLLEAGUE

You may access Colleague through the **Useful Links** page.

1. Navigate to <https://www.marywood.edu/depts/IT/useful-links>.
2. Click the yellow box titled **“Useful Links for Employees”**.
3. Click **Colleague Production 5.25 (New UI)** from the list.
4. Enter your Marywood credentials. They are the same as what you use to access your PC, Self-Service, and Brightspace.

USING THE XFCON2 FORM

1. Type the form mnemonic (**XFCON2**) in the **Form Search** text box.
2. A **Person LookUp** dialog box displays.
3. Refer to the report you received and type an instructor’s ID or name (Last Name, First Name) and click OK.
4. You will see the **Search Results** panel. Single click in the instructor’s record and click OK.
5. The instructor’s most recently entered contract will appear. Review the data for accuracy.
6. You will see the action taken by the department chair/school director in the lower right corner under the **“Approval”** header.

7. You will have three choices from the drop down in the bottom corner under **“Approval 2”** – **“A Approved; D Denied, or C Cancelled”**.
 - If the information is accurate, select **“A Approved”** from the dropdown menu. If the instructor has multiple contracts, the form will automatically cycle to the next contract.
 - If the information is NOT accurate, select **“C Cancelled”**. A new original must be submitted by the administrative assistant.
 - If you do not approve of the assignment for the instructor, select **“D Denied”**.



PTOL CONTRACT ENTRY AND APPROVAL

- Once all contracts are approved, navigate to the blue buttons at the top right, click save, and then click update.

The screenshot shows a form for entering PTOL contract details. The fields are organized as follows:

- Top row: Contract # (with a back arrow), Non Standard Amount (checkbox).
- Second row: Type, Orig Con, Start, End, Amount.
- Third row: GL Dept, Service Provided, Contract Type.
- Fourth row: Course, Work Desc.
- Fifth row: Term, Cred, Stdts, Comment.
- Sixth row: Primary XLIST, XLIST Stdts, Approval, Approval Status By.
- Bottom row: Contract Total If Approved, Approval 2, Approval Status 2 By.

A red rectangular box highlights the 'Approval 2' and 'Approval Status 2 By' fields in the bottom row.

- Once all contracts have been reviewed for the instructor and the status marked, click  and  to complete the process.
- Repeat the above steps to mark the status of contracts for other instructors.
- Note: If a REVISION has been submitted for an ORIGINAL contract and the ORIGINAL has not yet been reviewed, the REVISION will appear as the first contract for the instructor. Important: in this case, the REVISION AND THE ORIGINAL must be approved before the next approval.

PTOL CONTRACT ENTRY AND APPROVAL

STEP #6: THIRD APPROVAL – FISCAL SERVICES *(*ONLY FOR NON-STANDARD AMOUNTS*)*

Once the College Dean has completed their review of the contracts for their area, the Vice President for Finance and Administration will generate a report indicating the contracts that contain non-standard amounts. These contracts require this third approval before they are processed by HR/Payroll.

LOG INTO THE REPORT SERVER

You may access The Report Server through the **Useful Links** page.

1. Navigate to <https://www.marywood.edu/depts/IT/useful-links>.
2. Click the yellow box titled **“Useful Links for Employees”**.
3. Under **“Reporting”**, click **Marywood Report Server** from the list.
4. Enter your Marywood credentials. They are the same as what you use to access your PC, Self-Service, and Brightspace.

ACCESSING THE REPORT

Navigate to the folder named Faculty Information Reporting.

1. Navigate to <https://www.marywood.edu/depts/IT/useful-links>.
2. Click the report titled **“PTOL Contracts Needing 3rd Approval”**.
3. The report will show only contracts for non-standard amounts that have been approved by both the department chair/school director and College Dean.
4. The contracts on this report must be reviewed and approved in Colleague.

LOG INTO COLLEAGUE

You may access Colleague through the **Useful Links** page.

1. Navigate to <https://www.marywood.edu/depts/IT/useful-links>.
2. Click the yellow box titled **“Useful Links for Employees”**.
3. Click **Colleague Production 5.25 (New UI)** from the list.
4. Enter your Marywood credentials. They are the same as what you use to access your PC, Self-Service, and Brightspace.

USING THE XFCO3 FORM

1. Type the form mnemonic (**XFCO3**) in the **Form Search** text box.
2. A **Person LookUp** dialog box displays.
3. Refer to the report named above and type an instructor’s ID or name (Last Name, First Name) and click OK.
4. You will see the **Search Results** panel. Single click in the instructor’s record and click OK.
5. The instructor’s most recently entered contract will appear. Review the data for accuracy.
6. You will see the action taken by the department chair/school director in the lower right corner under the **“Approval”** header and the action taken by the College Dean under the **“Approval 2”** header.

PTOL CONTRACT ENTRY AND APPROVAL

7. You will have three choices from the drop down in the bottom corner under “Approval 2” – “A Approved; D Denied, or C Cancelled”.
 - If the information is accurate, select “A Approved” from the dropdown menu. If the instructor has multiple contracts, the form will automatically cycle to the next contract.
 - If the information is NOT accurate, select “C Cancelled”. A new original must be submitted by the administrative assistant.
 - If you do not approve of the assignment for the instructor, select “D Denied”.

The screenshot shows a form for entering PTOL contract information. At the top, there is a tab labeled '1' and a field for 'Contract #' with a left arrow. Below this are several rows of input fields. The first row includes 'Type', 'Orig Con', 'Start', 'End', and 'Amount'. The second row includes 'GL Dept', 'Service Provided', and 'Contract Type'. The third row includes 'Course' and 'Work Desc'. The fourth row includes 'Term', 'Cred', 'Stdts', and 'Comment'. The fifth row includes 'Primary XLIST', 'XLIST Stdts', and 'Approval Status By'. The sixth row includes 'Contract Total If Approved', 'Approval 2', and 'Approval 3'. The 'Approval 3' dropdown menu is highlighted with a red box.

8. Once all contracts have been reviewed for the instructor and the status marked, click [Save](#) and [Update](#) to complete the process.
9. Repeat the above steps to mark the status of contracts for other instructors.
10. Note: If a REVISION has been submitted for an ORIGINAL contract and the ORIGINAL has not yet been reviewed, the REVISION will appear as the first contract for the instructor. Important: in this case, the REVISION AND THE ORIGINAL must be approved before the next approval.

PTOL CONTRACT ENTRY AND APPROVAL

CRITICAL DATES – 2026SI – 2027SP

PTOL Contract Review, Submission, and Approval					
TASK	2026SI	2026S3	2026S2	2026FA	2027SP
Departments / Schools Begin to Review Course Assignments	4/1/26	4/1/26	5/1/26	6/1/26	10/1/26
Departments / Schools Confirm Instructor Assignments	5/11/26	5/11/26	6/29/26	8/17/26	1/4/27
Term Start	5/18/26	5/18/26	7/6/26	8/24/26	1/11/27
Last Day to Add Courses	5/20/26	5/26/26	7/8/26	9/1/26	1/19/27
Deadline for XFCONC Entry	5/21/26	5/27/26	7/9/26	9/2/26	1/20/27
Deadline for XFCONA Approval (Chair/Director)	5/28/26	6/3/26	7/16/26	9/4/26	1/27/27
Deadline for XFCON2 Approval (Dean)	6/3/26	6/5/26	7/21/26	9/5/26	2/2/27
Deadline for XFCON3 Approval (Fiscal)	6/4/26	6/7/26	7/22/26	9/6/26	2/5/27
Deadline for HR/Payroll to Process Contracts	6/5/26	6/9/26	7/23/26	9/7/26	2/8/27
First PTOL Pay Expected	6/15/26	6/15/26	7/31/26	9/15/26	2/15/27

Note: Late submissions or approvals may delay payment until a subsequent payroll cycle.

STANDARD AMOUNTS

COURSE TYPE	PT/ADJUNCT	FT/OVERLOAD
3-credit course (1 student)	\$445	\$441
1-credit course (5+ students)	\$768	\$735
2-credit course (5+ students)	\$1,530	\$1,470
3-credit course (5+ students)	\$2,278	\$2,205
4-6-credit studio (5+ students)	\$5,126	\$5,075

PTOL CONTRACT ENTRY AND APPROVAL

NON-STANDARD AMOUNTS

A non-standard amount should only be used when compensation does not align with the published standard contract amounts.

HOW TO CALCULATE A NON-STANDARD AMOUNT

When requesting a non-standard amount, departments should use a reasonable and supportable basis, such as:

- Prorated amount based on credit hours
 - Example: standard 3-credit rate adjusted for a 1-credit assignment
- Shared instruction / team teaching
 - Compensation divided based on assigned responsibilities
- Low enrollment / special arrangement approved in advance
- Additional duties directly tied to instruction (only when not more appropriately handled through a stipend request)
- Unique academic circumstances approved by the Dean

REQUIRED JUSTIFICATION

All non-standard requests must include a brief business justification in the comment field or supporting communication. Examples:

- “1-cr independent study; prorated from standard 3-cr rate”
- “Split compensation for co-taught course”
- “Accreditation-required clinical supervision section”
- “Approved exception due to specialized short-term delivery”

Requests lacking sufficient justification may be returned or denied.

IMPORTANT REMINDER

Non-standard amounts are subject to additional review and approval. Submission of a request does not guarantee approval.

BEST PRACTICE

Whenever possible, departments should use the published standard amounts to ensure consistency, timely processing, and equitable treatment across the University.

PTOL CONTRACT ENTRY AND APPROVAL

ACCESSING PREVIOUS CONTRACTS FOR AN INSTRUCTOR

All contracts for an instructor are available to view in the XFCONC screen or any of the approval screens in Colleague. Please follow the instructions below to access previous contracts for instructors.

HOW TO ACCESS PREVIOUS CONTRACTS IN XFCONC

1. Follow the instructions above to access an instructor's record in XFCONC in Colleague.
2. In the dark gray box at the bottom, hover your mouse over the white box with the number 1 in the upper left corner of the box. It will turn blue when you hover over it.
3. Single-click your mouse on the number 1 (see figure below).

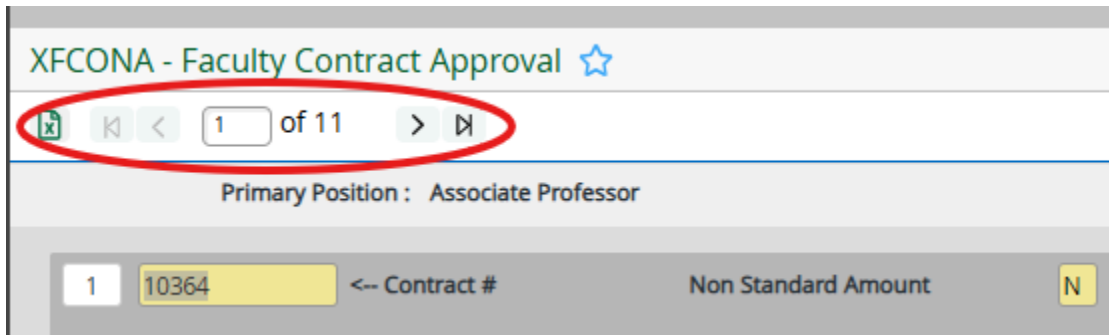
4. Then, navigate above the light gray box above the text that says "Primary Position" and you will see a menu appear that says { 1 of xx } with arrows (see figure below).

5. The contracts are arranged in reverse sequential order, with the most recently-submitted contract as #1, then the second-most-recent contract as #2, and so on. Click the "next page" arrow { > } to scroll through each contract. A blank screen will signify that you have reached the end of the instructor's contracts.

PTOL CONTRACT ENTRY AND APPROVAL

HOW TO ACCESS PREVIOUS CONTRACTS IN XFCONA / XFCON2 / XFCON3

1. Follow the instructions above to access an instructor's record in your appropriate approval screen (XFCONA, XFCON2, XFCON3) in Colleague.
2. Locate the menu at the top-left of the screen under the words "Faculty Contract Approval" (see figure below).



3. The contracts are arranged in reverse sequential order, with the most recently-submitted contract as #1, then the second-most-recent contract as #2, and so on. Click the "next page" arrow { > } to scroll through each contract. A blank screen will signify that you have reached the end of the instructor's contracts.