

External Affiliate Scholar (Courtesy Appointment) Request Form Procedures

Used to initiate External Affiliate Scholar Appointment letters.

Department/Program Administrators should follow the steps below when processing their desired External Affiliate Appointment Requests:

1. Before submitting the form, administrators must activate their W&M DocuSign accounts by logging into their accounts at the following link: <https://docusign.wm.edu>.
2. Administrators should have all documents/information relevant to the form on hand to easily refer to when filling out the form (i.e. Affiliate position request type: either Research Scholar or Visiting Scholar), dates of appointment length, affiliate Resume/CV, etc).
3. After clicking on the link for the form administrators are taken to a landing page where they are asked to submit their name & email address, as well as the names & emails of the affiliate sponsor, the chair/director, and the unit's Vice-dean.
 - If the affiliate sponsor is the same as the unit chair/director, this field can be left blank on the landing page to avoid routing duplication.
4. **Please fill out email addresses carefully, as email addresses entered incorrectly may result in a voided form.**
5. Once submitted, the form will load automatically for administrators to fill.
6. Once filled & signed, the form will follow approval routing to the sponsor (if applicable), the chair/director, Faculty Personnel Services, and then to the Vice-dean for final review and approval.

Affiliate Scholars with Co-Instructor Responsibilities (see pg. 3, item B1 of the A&S Affiliate Definitions & Procedures document for further information):

- The new DocuSign form now captures additional information needed to assign Affiliate co-IOR responsibilities.
 - Departments and programs should make their affiliate aware of the additional background screening process and provide an index number on the DocuSign for the background check (\$25 fee).

Other unique Affiliate Scholar Appointment Types:

- A reminder to review the A&S Affiliate Definitions & Procedures for further guidance on affiliate scholars.