INSTRUCTIONAL STUDENT ASSISTANT (ISA) APPOINTMENT FORM ONBASE ONLINE SUBMISSION PROCESS



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I. Home Calendars Faculty Resources Academic Student Employee Resource Docs & Forms RPT Recruiting **Quick Links** Welcome Faculty Diversity Unit 3 CBA Welcome to the California State University, San Bernardino office of Academic Faculty Jobs Personnel. As a division of Academic Affairs, we provide support to the Provost and Vice Unit 11 CBA President of Academic Affairs, Deans, Department Chairs and faculty on academic Academic Student Jobs personnel matters. Our office provides leadership and oversight of academic policy and FAM procedures in a manner that supports the overall academic goals, mission and strategic Faculty Diversity plan of the university. Labor Relations Dept. Chair List The Office of Academic Personnel: Contact Us EO 1096 Oversees the recruitment, appointment ent, advancement, and retention of a diverse faculty and academic appointees. 025 Provides administrative support and guidance for all Faculty, Coaches, Librarians, SSPAR's (R03) as well as all Academic Student Employees including Teaching New Employee Onboarding Academic Personnel Associates, Graduate Assistants, and Instructional Student Assistants (R11). 5500 University Parkway, AD-101 San Bernardino, CA 92407 · Guides and monitors the search for and hiring of academic faculty and Phone - 909-537-5029 compliance with federal and state laws, rules and regulations regarding Fax - 909-537-3188 recruitment/employment. academicpersonnel@csusb.edu Provides compliance and interpretation regarding the Collective Bargaining Agreement (CBA) and the Faculty Administrative Manual (FAM). Dr. J. P. Vicknair Interim Associate Provost of Manages academic labor matters including grievances and complaints. Academic Personnel Phone - 909-537-5029 Facilitates the education and training of University faculty on how to work ivicknai@csusb.edu effectively in a diverse environment Executes administrative processing for hires/rehires, promotions, salary adjustments, faculty leaves, Faculty Early Retirement Program (FERP), resignations, etc. Our goal is to provide you with service excellence and the necessary support and guidance for faculty related affairs. We hope you will find the needed tools and esources on this website to help you succeed here at CSUSB. П. Home Calendars Faculty Resources Academic Student Employee Resources Docs & Forms RPT Recruiting

ISA Appointment Form & Instructions)
Unit 11 CBA	
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Contact Us

Academic Personnel 5500 University Parkway, AD-101 San Bernardino, CA 92407 Phone - 909-537-5029 Fax - 909-537-3188 academicpersonnel@csusb.edu

Dr. J. P. Vicknair Interim Associate Provost of Academic Personnel Phone - 909-537-5029 jvicknai@csusb.edu

Unit 11 Academic Student Employment Resources

Student Employment at CSUSB

Multiple employment opportunities are available for CSUSB students all over campus.

All student employment positions are at will positions.

Student Assistants: This on-campus work program offers students the chance to explore and develop career related skills and gain professional experience. Anyone who is currently registered as a student at CSUSB and is in good academic standing may be eligible to work as a Student Assistant.

Federal Work Study : Federal-work study is a federally funded financial aid program. It increases available part-time employment for students who need financial assistance while giving them the opportunity to gain practical work experience. Those who wish to work in the work-study program must be approved by the Financial Aid Office prior to being hired. For more information, please contact the Financial Aid Office.

Instructional Student Assistants / Graduate Assistants / Teaching Associates: Students who are hired as Instructional Student Assistants (ISA), Graduate Assistants (GA), or Teaching Associates (TA) assist a professor with his/her class load through miscellaneous tasks such as conducting research, teaching, facilitating group discussions, grading papers, or tutoring. For more information, look at the Unit 11 CBA.

Unit 11 Quick Links

Human Resources
Payroll Depatment
Autoworkers Union

Prepared by: Tamanika Sells Office of Academic Personnel January 31, 2018

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b Opportunities	Data Entry/Form Creation			
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cademic Personnel 000 University Parkway, AD-101 an Bernardino, CA 92407 none - 909-537-5029 xx - 909-537-3188 cademicpersonnel@csusb.edu	New Eunctionality: a. A "Print" button is now available at the bottom of the form. b. A "Job Duties" section is at the bottom of the form. Select the applicable job du Approval	ities and enter the percent	age.	
r. J. P. Vicknair terim Associate Provost of cademic Personnel hone - 909-537-5029 icknai@csusb.edu	Each form submitted for approval will generate an email containing a link to the form credentials. You will then be taken to a specific ISA Appointment form for your review ISA Appointment Form Approvals	. Click on the link and log i and approval.	n using your PeopleSoft	
	Update: New OnBase Search Function			
	The following functionality is now available in OnBase. ISA Appointment form Approv Personnel) will show for forms entered from this point forward. Forms entered before is the new functionality:	val Dates for (college/depa the update will not have t	rtment/Academic he Approval Dates. Here	
	 Search criteria now includes ability to search by Department. If desired, select the enter key. 	Department from the drop	p down menu and press	
	2. Search results window now includes <i>dates</i> form was approved by department/	college Approvers and Aca	ademic Personnel.	
	3. Search results show the status of form under the "WF Status" field (last column	-scroll to right):		

IV.

Log in using your PeopleSoft credentials. The Username and Password you use to log in to the "MyCoyote Portal".



1) Completing Online ISA Appointment Form:

Enter the student's Employee ID in the "EMPLID" field and press the "Tab" key. The student's First and Last Name will populate in the corresponding fields. Verify the information is correct. If the employee is not in PeopleSoft, their name will not populate in OnBase.

nstructional Student Assistant Appoir	tment Form		
STUDENT PARATION EMPLO* First Name* Middle Initial Editors	Last Name* Record Number		
Degree / Some Callege •			
VPOINTMENT INFORMATION Colleges / Other Areas*	Department *	Classification •	End Datas
Hourty Rate (3)*	Hours Per Week*	Position Number *	
Approver Name*	Approver Email*	Weighted Units*	A
Job Duties *	ISA Job Duties % *		

2) Education Section:

Select one of the two options from the drop down menu:

- a) Some College: Indicates the student is enrolled in a degree program but has not yet completed/obtained degree.
- **b) Degree:** Indicates the student has completed a degree. When this is selected a row of fields will appear under the **Education** section named *Degree Information*.

Degree Information - This section contains free form text fields allowing the following information to be entered in the corresponding fields:

- Degree
- Institution
- Year
- Major
- **Multiple Degrees**: Click the "Add" button and additional Degree Information rows will be added to the form.

Education				_
Degree Information	-			Add
Degree ·		Tear •	Major *	Remove
				Remove
			Prepared by: Tamanika Sells	
			January 31, 2018	

3) Job Duties Section:

This section must be completed to show the percentage of job duties categories the student will be assigned. If additional rows are needed, click on the "*ADD*" button and another section will appear allowing the type of duties to be selected from a drop down menu.

- a) Job Duties: Select the type of job duties from the drop down menu.
- b) **ISA Job Duties %:** Type in the percentage of time the student will be assigned per duties type.

For example:

- Clerical 10%
- Technical 10%
- Instructional 80%

The Total percentage must add up to 100%

• Multiple Job Duty Categories : Click the "Add" button to populate additional Job Duties rows.

lob Duties	Job Duties *	KA Job Duttes %
	CLERICAL: (E.G., GENERAL OFFICE, PHONES, FILING, ERRANDS, TYPING, PROCESSING SCAN.)	Remove
	INSTRUCTIONAL: (E.G., GRADING, TUTORING, INSTRUCTION)	Remove
	TECHNICAL: (E.G., LABORATORY SET-UP AND TAKEDOWN, REPAIRS AND MAINTENANCE OF EQUIPMENT, ASSISTANCE IN MEDIA OPER	Remove

4) Comments Field:

This field is a free form field that allows you to enter notes. The notes will be saved on the form when it is submitted.

-				
COMMENTS				
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				1

5) Form Submission:

When the form is complete, it must be "Submitted" to be saved in OnBase and forwarded via workflow to the "Assigned Approver". Once the form is submitted the "Assigned Approver" will receive an email notification that the ISA Appointment form is awaiting their review and approval. The form can also be *Printed* before it is submitted. If the form is submitted first, it can be retrieved via the Search feature.

6) All fields with an asterisk (*) are required. The form cannot be submitted for approval if any of the fields are blank or highlighted in "red". If this happens, enter or correct the information in the fields hightligted in "red" and press the "Tab" key. Once the system acknowledges the change, you will be able to save and submit the form by clicking the "<u>Submit</u>" button.

MPUD - Dest Na	e* Middle Initial	Last Name*	Record Number			
Jucation						
egree / Some College*						
POINTMENT INFORMATION						
Jeges / Other Areas*			Department*	Classification *	191	
ture of Appointment*			Bridge Appointment*	Effective Date *	End Date*	
why Rate (5)*			Hours Per Week*	Position Namber*		
prover Name*	100		Approver Email*	Weighted Units*		
						local.
b Duties :			Job Factors #		KA July Parties N.*	Add
		CLERICAL: ILC., CENERAL OFFIC	L PHONES, FLUNC, ERRANDS, TYPINC, PROCESSING SCAN.)	0		Remove
		INSTRUCTIONAL (I.C. CRAPNIC	TUTOPOLE INSTRUCTION			Response
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		TECHNICAL (E.C., LABORATORY	SET-UP AND TAKEDOWN, REPAIRS AND MAINTENANCE OF EQUIPMENT, ASSISTANCE INC.	5).		Remove
MMENTS						
THORIZATION						
mit						

- 7) Once you click "Submit" a message will appear in the lower right corner of the screen confirming submission of the form.
 - An automatic email will be sent to whomever is listed as an "Assigned Approver" for the department or college. The email will notify them that the form has been completed and submitted for approval. It will also contain a link embedded in the email that the "Assigned Approver" can click on and be taken directly to the form:

From: DoNotReply@csusb.edu Subject: An ISA Form for Your Review

"An ISA Appointment is awaiting your approval prior to submittal to Academic Personnel for processing. Please click the link below:"

8) The following message will also appear:



- a) Select "Yes" and a new blank ISA Appointment form will be loaded.
- b) Select "*No*" and the Instructional Student Assistant section on the screen will become a blank. At this point you can close the browser page to exit.

Assigned Approver View:

1) When an ISA form has been completed in OnBase and submitted for your approval you will receive an email:

From: DoNotReply@csusb.edu Subject: An ISA Form for Your Review

"An ISA Appointment is awaiting your approval prior to submittal to Academic Personnel for processing. Please click the link below:

https://workflowupgrade.csusb.edu/AppNet/docpop/formpop.aspx?docid=2025979&chksum=d4c4a3b806e8523318 712e6945ec93cad36313eb8fe7877445b13fd8886671eb"

Clicking on the link will take you directly to the form for you to review and approve. You can also log into OnBase and check your "queue" in the Workflow to work with more than one form at a time.

a vieware Horizon X	the second se			
→ C O Secure	https://horizon.csusb.edu/portal/webclient/index.html#/desktop			
	OnBase 15	i.0.3.238 [Test System - Not For Production Use] - Internet Explore	r	
DinBase Log out	Instructional Student Assistant Appoint	ment Form		
Document 💽 🔅 😡 New Form	STUDENT INFORMATION			
fs Computerized Information Access	EMPLID* First Name* Middle Initial La	est Name* Record Number		
Instructional Student Assistant Appointment Form	Education			
Study Abroad Proposal Form	Degree / Some College •			
	APPOINTMENT INFORMATION			
	Colleges / Other Areas*	Department *	Classification *	
	Nature of Appointment*	Effective Date*	End Date*	
	Hourty Rate (5)*	Hours Per Week*	Position Number*	
	Approver Name •	Approver Email •	Weighted Units*	
	AUTHORIZATION	12		
1	Assigned Approver			
	Approve / Deny			
	Signature Of the Approver	Date		

- 2) Review the form to ensure the information listed below is correct, for example:
 - Employee ID Number
 - Effective Dates
 - Nature of Appointment
 - Department
 - Classification
 - Hourly Rate
 - Hours Per Week
 - Position Number
- 3) If all is correct, you will go to the "Authorization" section and click on the drop down menu and select "Approve" and "Sign and Date". Doing so will populate your name and the date of the action.

Primary Viewer		
ISA instructional Student Assistan Appointment Form (unity) - 6/2/2017		1150 - INSTRUCTIONAL STUDENT ON-CAMPUS
Nature of Appointment*	Effective Date * 06/21/2017	End Date * 09/12/2017
Hourly Rate (\$) * 17.750000	Hours Per Week* 20	Position Number*
Approver Name*	Approver Email *	Weighted Units* 20
AUTHORIZATION		
Assigned Approver		
Approve / Deny		
Sign and Date		
Signature Of the Approver TEST ISA APPROVER	Date 08/02/2017	
Submit		

4) After approving and clicking the "Sign and Date" button, the next step is to click on the "*Submit*" button. Changes will be saved changes and the form will be forwarded electronically to Academic Personnel for the final review and approval. If there are no issues, the form will not be returned electronically for correction.

The form will also be removed from your "queue"

Denial/Correction:

When a form is returned/denied electronically by Academic Personnel an email will be sent to the Assigned Approver. The email will contain a link to the form.

Form Correction Section Fields:

- a) Denial Reasons: This field lists the reasons for the denial
- b) Other Denial Reasons: Reasons not listed in the drop down menu are listed
- c) **Correction Status:** Indicates whether the correction has been made. Select "Completed" from the drop down menu after correction is made before resubmittal to Academic Personnel.

PLID* First Name*	Middle Initial	Last Name *	Record Number			
ucation						
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DINTMENT INFORMATION						
eges / Other Areas*	_	Department •			Classification *	
			• 1 ⁴		TTS0 - INSTRUCTIONAL STUDENT ON-CAMPUS	
NCURRENT APPOINTMENT		04/10/2017			06/20/2017	
rly Rate (\$)*		Hours Per Week*			Position Number*	
000000		10				
vrover Name*		Approver Email			Weighted Units*	
		_			14	
ORM CORRECTION						
				1949 - C.		

FORM SEARCH: LOCATION OF ISA FORM SEARCH PAGE:

Form Search

https://www.csusb.edu/academic-personnel/academic-student-employee-resources/isaappointment-form-instructions

The following functionality is now available in OnBase. ISA Appointment form Approval Dates for (college/department/Academic Personnel) will show for forms entered from this point forward. Forms entered before the update will not have the Approval Dates. Here is the new functionality:

- 1) Search criteria now includes ability to search by Department. If desired, select *Department* from the drop down menu and press the enter key.
- 2) Search results window now includes *dates* form was approved by department/college Approvers and Academic Personnel.
- 3) Search results show the status of form under the "WF Status" field (last column-scroll to right):
 - a) "Complete": Academic Personnel has received and approved the form.
 - **b)** "Assigned Approver": Form has been entered into OnBase, submitted to the "Assigned Approver" and awaiting approval prior to submission to Academic Personnel.
 - c) "Assigned Academic Personnel Review": Form approved by department/college Assigned Approver and awaiting Academic Personnel approval.

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ISA Appointment Form & Instructions	I	SA Appoint	iment Form & Instr	uctions				
Unit 11 CBA	1	nstructions to	Complete and Submit the	ISA Appointr	nent form			
ASE Forms	C	Online						
Job Opportunities	_							
	D	ata Entry/Form O	Creation					
ontact Us	T	he link below will take you to si	ign in using your PeopleSoft credentials and to a bla	nk ISA Appointment form.				
		Blank ISA Appointment Form	>					
Academic Personnel	N	ew Functionality:						
5500 University Parkwa	y, AD-101	a. A "Print" button is now available at the bottom of the form.						
San Bernardino, CA 924 Phone - 909-537-5029	107	b. A "Job Duties" section is at the bottom of the form. Select the applicable job duties and enter the percentage.						
Fax - 909-537-3188		Annyous						
academicpersonnel@c	susb.edu A	oprovat						
Dr. J. P. Vicknair	-							
Academic Personnel	Set or Ea	ach form submitted the pp rou edentials. You will then be tak	al will generate an email containing a link to the forr en to a specific ISA Appointment form for your revie	 Click on the link and log is w and approval. 	n using your PeopleSoft			
Phone - 909-537-5029	6							
Jvicknai@csusb.edu		ISA Appointment Form Appro	wats 🗧					
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	TI Pe is	he following functionality is no ersonnel) will show for forms e the new functionality:	w available in OnBase. ISA Appointment form Appr intered from this point forward. Forms entered befor	oval Dates for (college/depar re the update will not have t	tment/Academic ne Approval Dates. Here			
		 Search criteria now includ the enter key. 	des ability to search by Department. If desired, selec	t Department from the drop	down menu and press			
		2. Search results window no	w includes <i>dates</i> form was approved by departmen	t/college Approvers and Aca	demic Personnel.			
		3. Search results show the s	tatus of form under the "WF Status" field (last colum	n-scroll to right):				
		 "Complete"= Academic P 	Personnel has received and approved form.					
		 "Assigned Approver"= For 	orm has been entered into OnBase, submitted to "As	signed Approver" and await	ing approval prior to			





Search Criteria is:

- a) Form Submission Date and/or Date Range
- b) Employee ID Number
- c) Employee First Name
- d) Employee Last Name
- e) Employee ID Number of Form Creator
- f) Department Name

SEARCH RESULTS:

Drag a column here to group by.													
Document I	Date	EMPLID	First Name	Last Name	ISA Colleges	ISA Department	ISA Approver Name	ISA Dept Approval Date	ISA ACAD PERS Approval Dat	ISA Data Entry First Name	ISA Data Entry Last Name	WF Status	
1/26/2018	1				-			1/29/2018	1/29/2018			COMPLETE	
1/26/2018	1							1/29/2018	1/29/2018			COMPLETE	

Search results will display in the above window. Double click the desired name to open the form.

The following fields will show:

- 1) Document Entry Date
- 2) Employee's ID#
- 3) Employee's First Name
- 4) Employee's Last Name
- 5) Hiring College
- 6) Hiring Department

- 7) Assigned Approver Name
 8) Assigned Approver's Approval Date
 9) Academic Personnel Approval Date
 10) Form Creator's First Name

- 11) Form Creator's Last Name
- 12) Work Flow Status

Quick Facts About OnBase:

- 1. End users must have been granted access as one of the following to utilize the system:
 - a) *Assigned Approver-* approves budget, confirms position, validates data is correct and submits electronically to Academic Personnel for final approval.
 - b) *Data Entry/Form Creator* enters the form into OnBase and submits to the Assigned Approver

Email: tsells@csusb.edu to update/request/change user access.

- 2) Forms are only saved when the "Submit" button has been pressed.
- 3) Fields with the red asterisk are required. The system will not allow forms to be submitted if fields with the asterisk are blank.
- 4) Corrections/Revisions- Once a form has been submitted electronically to Academic Personnel, it cannot be changed. A new form must be submitted and the Nature of Appointment "Correction" or " Revision" must be selected. Notation describing the change must also be entered in the "Comments" field.
- 5) Changes/Revisions- Can be made <u>before</u> forms are submitted to Academic Personnel. For example: Once the form is created and submitted to the Assigned Approver, the Assigned Approver can make the changes. Alternatively, the Assigned Approver can route the form back to the form creator for changes/corrections to made prior to submitting to Academic Personnel.



*** Your input is welcome!*** Questions regarding accessing OnBase:

Email feedback to: <u>tsells@csusb.edu</u> Phone: ext. 73596