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

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

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Contact Us

Academic Personnel
5500 University Parkway, AD-101
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academicpersonnel@csusb.edu

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

Welcome

Welcome to the California State University, San Bernardino office of Academic Personnel. As a division of Academic Affairs, we provide support to the Provost and Vice President of Academic Affairs, Deans, Department Chairs and faculty on academic personnel matters. Our office provides leadership and oversight of academic policy and procedures in a manner that supports the overall academic goals, mission and strategic plan of the university.

The Office of Academic Personnel:

- Oversees the recruitment, appointment, advancement, and retention of a diverse faculty and academic appointees.
- Provides administrative support and guidance for all Faculty, Coaches, Librarians, SSPAR's (R03) as well as all Academic Student Employees including Teaching Associates, Graduate Assistants, and Instructional Student Assistants (R11).
- Guides and monitors the search for and hiring of academic faculty and compliance with federal and state laws, rules and regulations regarding recruitment/employment.
- Provides compliance and interpretation regarding the Collective Bargaining Agreement (CBA) and the Faculty Administrative Manual (FAM).
- Manages academic labor matters including grievances and complaints.
- Facilitates the education and training of University faculty on how to work 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 resources on this website to help you succeed here at CSUSB.

Quick Links

Faculty Jobs

Academic Student Jobs

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EO 1096

Q2S

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II.

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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

III.

ISA Appointment Form & Instructions

Instructions to Complete and Submit the ISA Appointment form Online

Data Entry/Form Creation

The link below will take you to sign in using your PeopleSoft credentials and to a blank ISA Appointment form.

Blank ISA Appointment Form →

New Functionality:

    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 duties and enter the percentage.

Approval

Each form submitted for approval will generate an email containing a link to the form. Click on the link and log in using your PeopleSoft credentials. You will then be taken to a specific ISA Appointment form for your review and approval.

ISA Appointment Form Approvals →

Update: New OnBase Search Function

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):

- *"Complete"*= Academic Personnel has received and approved form.

- *"Assigned Approver"*= Form has been entered into OnBase, submitted to "Assigned Approver" and awaiting approval prior to

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IV.

Log in using your PeopleSoft credentials. The Username and Password you use to log in to the "MyCoyote Portal".
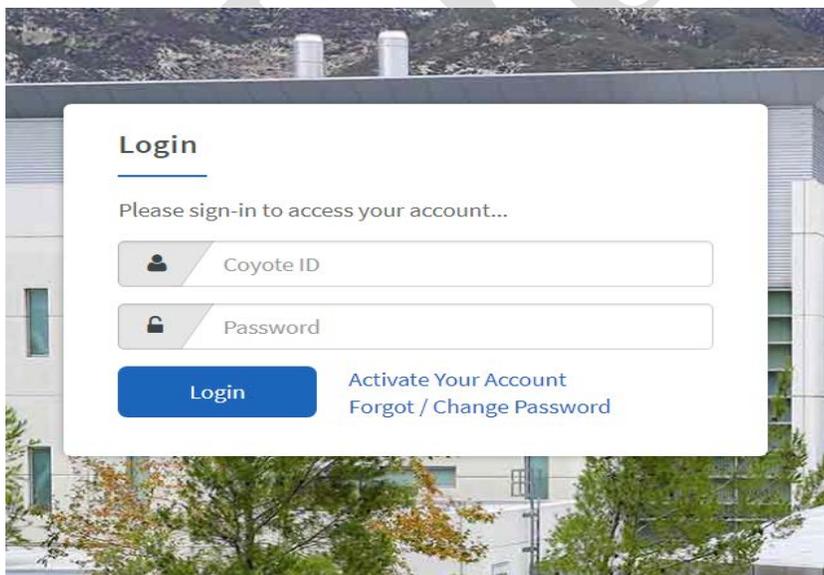
1) **Completing Online ISA Appointment Form:**
Enter the student's Employee ID in the "EMPLID" field and press the "Tab" key. The student's First and Last Name will populate in the corresponding fields. Verify the information is correct. If the employee is not in PeopleSoft, their name will not populate in OnBase.

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.

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.

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.

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 "**Submit**" button.

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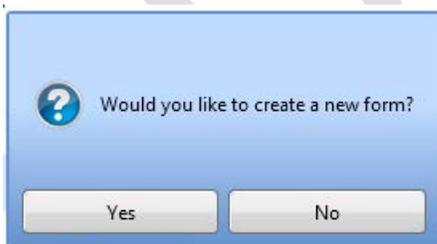
a) Select *"Yes"* and a new blank ISA Appointment form will be loaded.
b) Select *"No"* and the Instructional Student Assistant section on the screen will become a blank. At this point you can close the browser page to exit.

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=d4c4a3b806e8523318712e6945ec93cad36313eb8fe7877445b13fd8886671eb"

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.

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.

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.

FORM SEARCH:
LOCATION OF ISA FORM SEARCH PAGE:

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

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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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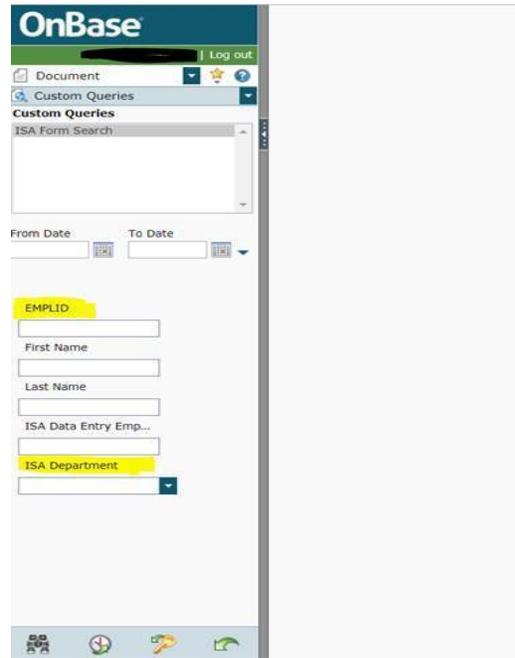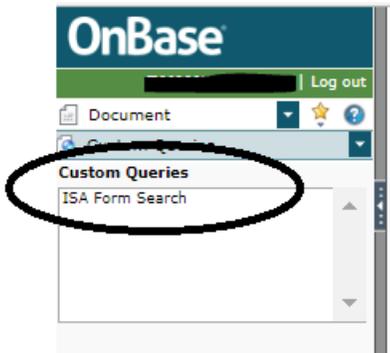
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Search Criteria is:

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:

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 *before* 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: tsells@csusb.edu
Phone: ext. 73596

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