CSUS Release Time
Revised Form Instructions

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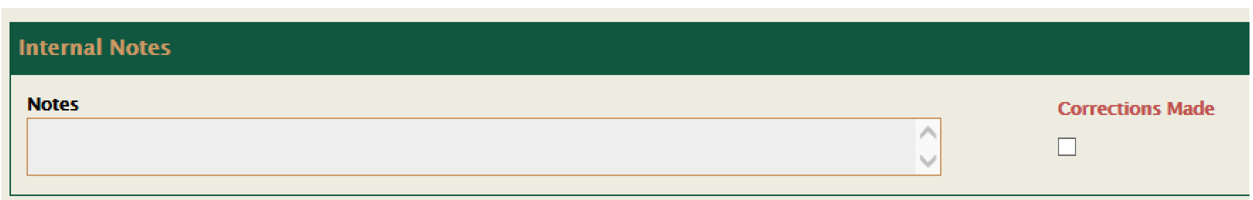
CORRECTING RELEASE TIME INFORMATION: If an existing form needs to be updated in order to correct release or assigned time details (such as units, funding source, activity code, and/or backup documentation), please look up the status of the form via custom query (pg 5):

a) If the status of the form is under ***Faculty Review*** or ***Faculty Approval***, the faculty member should push the form back to submitter review and contact the submitter to make the desired changes. The faculty should indicate what changes are required in the Comment box near their approval buttons.

b) If the status of the form is under ***Chair Review*** or ***Dean's Office Review*,** please contact the college analyst to make the desired changes. The college analyst should wait until the form reaches the Dean's Office Review folder to make the requested updates.[1]

c) If the status of the form is under ***Dean Approval*, *Provost's Office Review*,** or ***Provost Approval***, please contact the division analyst (Curissa Watts) to make the desired changes. The division analyst should wait until the form reaches Provost's Office Review folder to make the requested updates.[1]

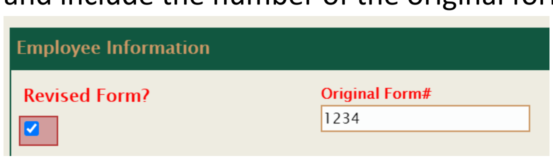
At any level, when revisions occur please indicate what changes were made in the Internal Notes box and check the "Corrections Made" checkbox. Include your initials to indicate which user left the note.



[1] *The college analyst and division analyst should **ONLY** make changes/updates when a form is in their workflow folder. Making changes while the form is outside of your workflow folder may cause the form to move from its pending status and get stuck in limbo. When the form is located in your quality control folder, you can make corrections, indicate changes within an internal note on the form, and move it forward.*

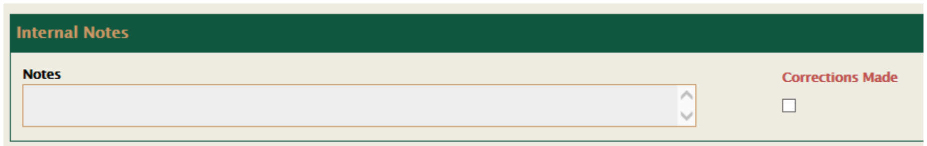
d) If the status of the form is in ***OIREP review*** or has passed ***OIREP Review*,** the submitter will need to complete the following steps:

- Enter a new form with the correct info, check the revised form checkbox, and include the number of the original form.



- Please note that the revised form will REPLACE the original form, so it should include **ALL** release and assigned time the faculty member will receive. All original entries should be included in addition to any new or corrected entries.

- Please indicate what updates were made to the form in the Internal Notes box and check the “Corrections Made” checkbox. Include your initials to indicate which user left the note.



- Contact OIREP to update the data that has been imported into CMS. Let Nancy Hardy know a revised form has been entered and should replace the data that has been imported into CMS.

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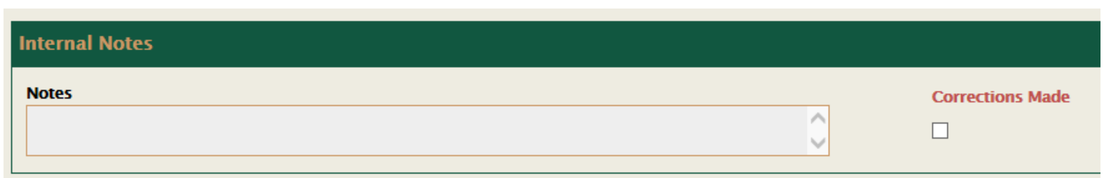
- Once the new form has been entered, the submitter should contact the college analyst to request the original form be deleted. Please provide the original form number when requesting the deletion.

CORRECTING CMS JOB DATA OR REPORTS-TO INFO: If the employee CMS data or reports-to information is incorrect on an existing form, the submitter will need to complete the following steps:

- Once the data or reports-to info has been updated and is active in CMS, the submitter should enter a new revised form, check the revised form checkbox and include the number of the original form.

- Please note that the revised form will REPLACE the original form, so it should include **ALL** release and assigned time entries the faculty member will receive. All original entries should be included in addition to any new or corrected entries.
- After the new form has been entered, contact the college analyst to request the original form be deleted. Please provide the original form number when requesting the deletion.
- On the revised form, please indicate the reason a new form is being entered in the Internal Notes box and check the "Corrections Made" checkbox. Include your initials to indicate which user left the note.



- IF the original form is in or has passed ***OIREP review***, the submitter will need to contact the OIREP office to update the data that has been imported into CMS. Let Nancy Hardy know a revised form has been entered and should replace the data that has been imported into CMS.

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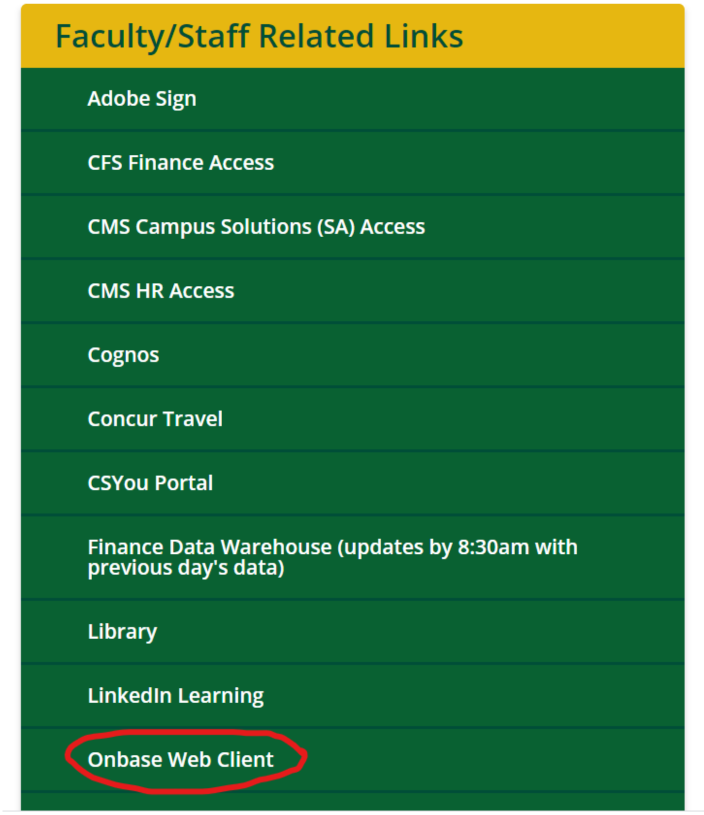
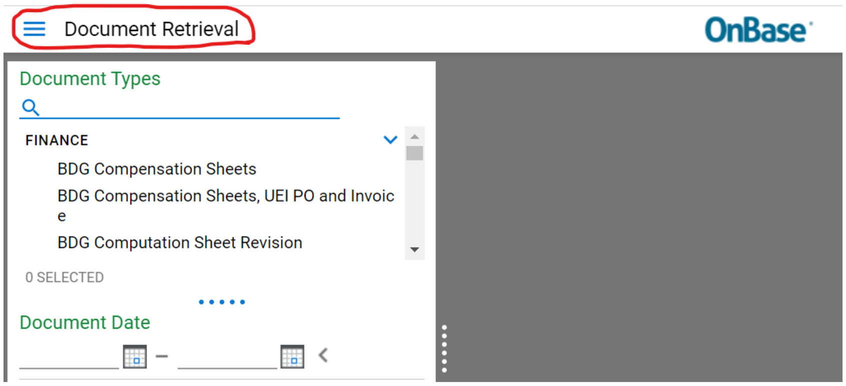
VERIFYING THE STATUS OF A FORM VIA CUSTOM QUERY

A. ACCESSING A FORM VIA ONBASE WEB CLIENT

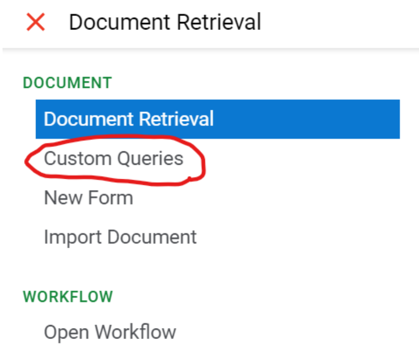
1. Log on to https://my.csus.edu/ and Navigate to **Onbase Web Client** under *Faculty/Staff Related Links*.



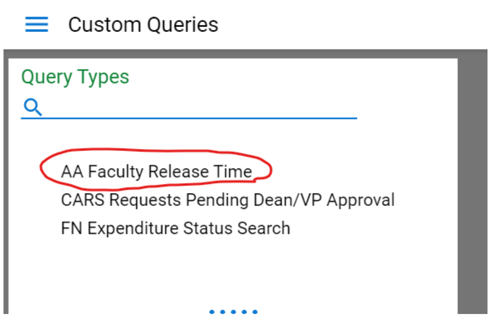
2. Navigate to **Document Retrieval** in the top left corner.



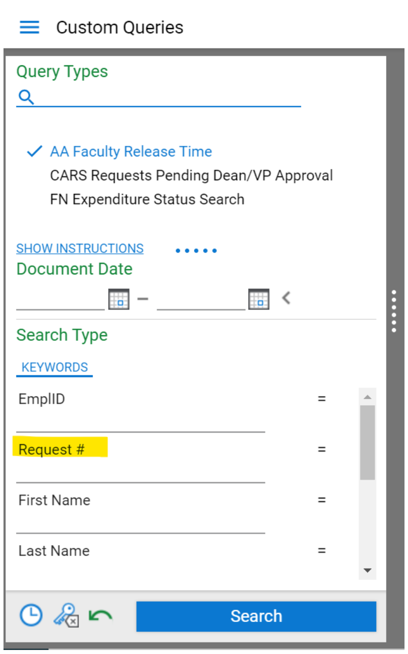
3. Select **Custom Queries.**



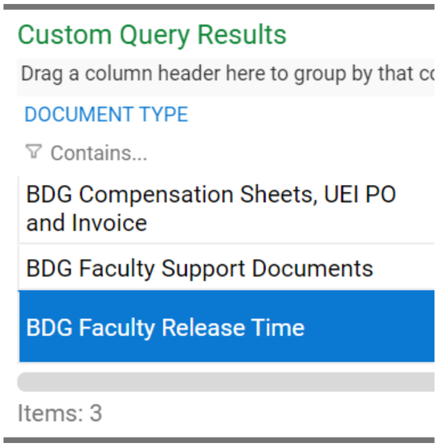
4. Select **AA Faculty Release Time.**



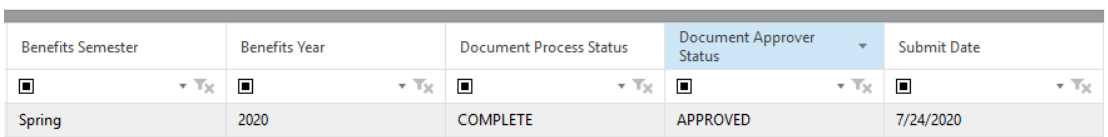
5. Enter the **Request #** for the form you are looking up.



6. When viewing the status of a form, be sure to identify the row that reads **"BDG Faculty Release Time"** instead of the supporting documentation.

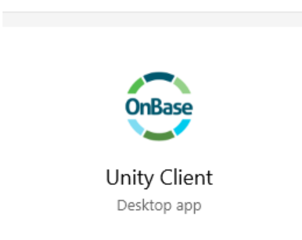


7. Use the scrollbar to navigate to the right to locate the "Document Status" column, in which you can identify what approval stage the form is in.

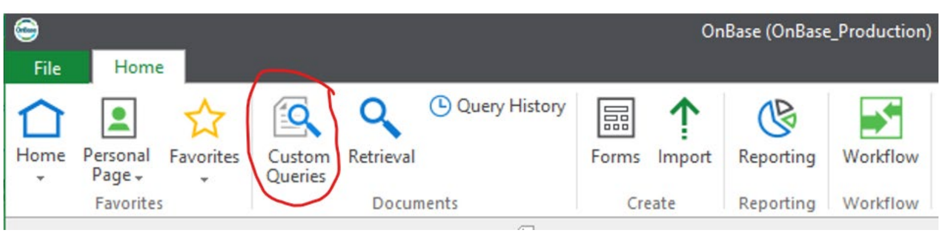


B. ACCESSING A FORM VIA ONBASE UNITY CLIENT DESKTOP APP

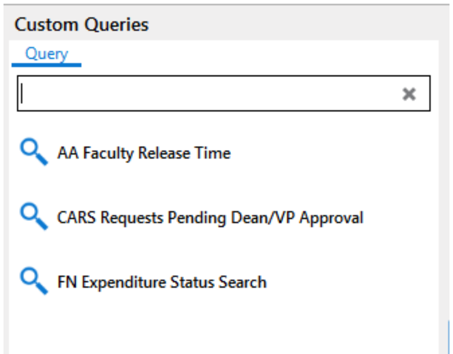
1. Search for **"Unity Client"** on your desktop. Open app.



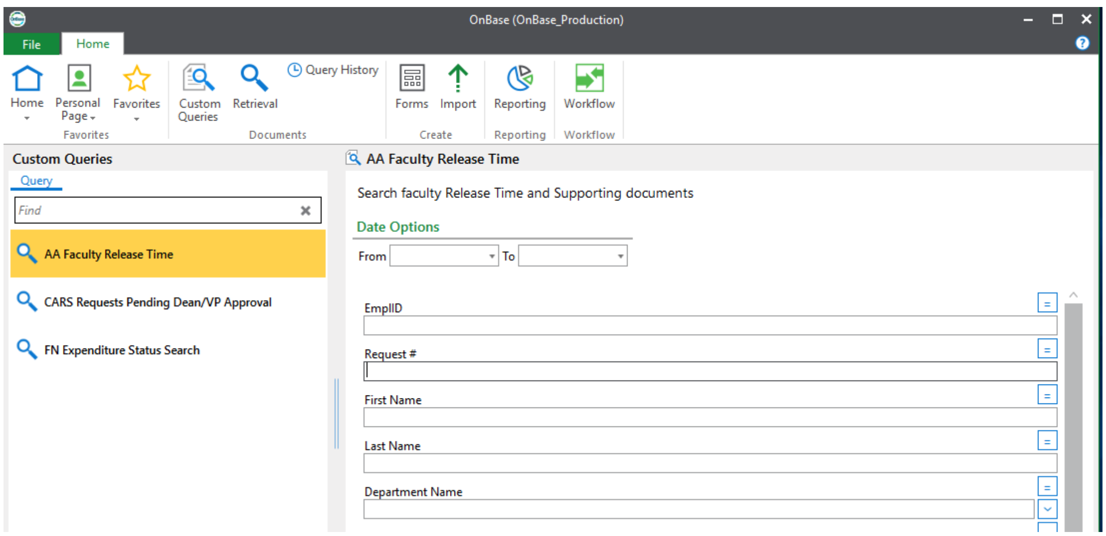
2. Navigate to **Custom Queries.**



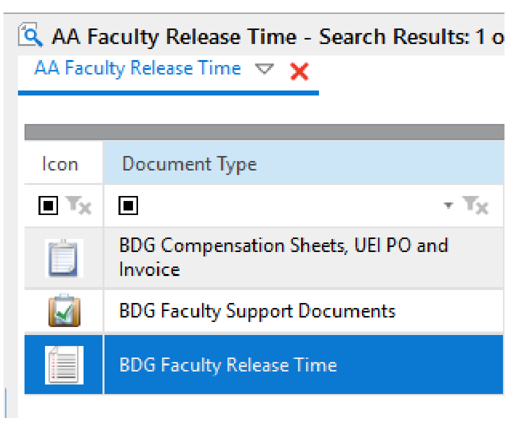
3. Select **AA Faculty Release Time.**



4. Enter form number in **the Request #** field.



8. When viewing the status of a form, be sure to identify the row that reads **"BDG Faculty Release Time"** instead of the supporting documentation.



5. Use the scrollbar to navigate to the right to locate the "Document Status" column, in which you can identify what approval stage the form is in.

Benefits Semester	Benefits Year	Document Process Status	Document Approver Status	Submit Date
Spring	2020	COMPLETE	APPROVED	7/24/2020