



ADD/DROP/WITHDRAW PETITION USER GUIDE FOR THE DEPARTMENT STAFF

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After a student submits an add/drop/withdraw form, it will automatically route to the instructor of the course for approval. The instructor will receive an automated email with the link to the pending approval queue.

If a request is denied, the student will get an automated email providing them with the reason for denial. If approved, the request will automatically route to the next level of approval or processing, depending on the time of the semester.

Before census, the approved form will route to the appropriate Academic Department for processing after the instructor and department chair approve. Everyone who has access to the department work queue will receive a daily reminder email with the link to the queue (only when there are forms ready for review).

ACCESS TO ONBASE PENDING WORKFLOW

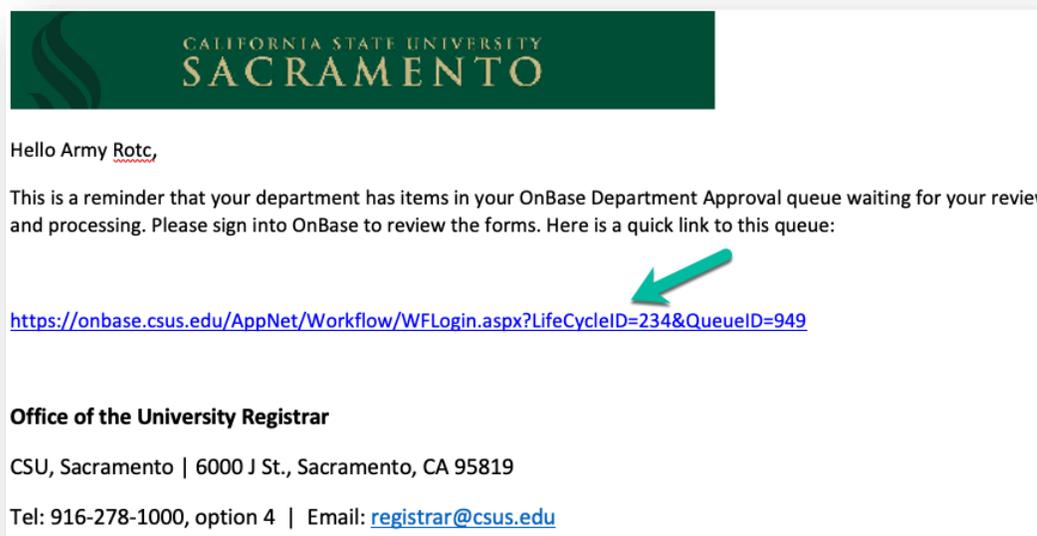
There are 2 ways to access to OnBase Pending approval queue:

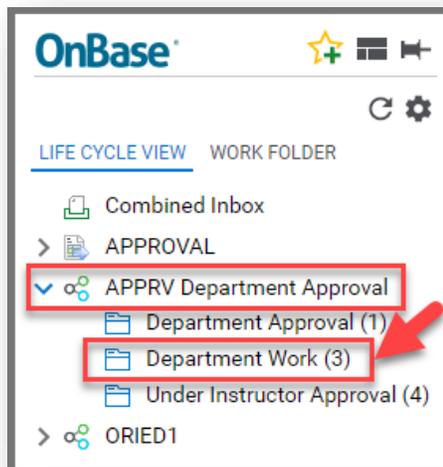
1. [Use the link in the email notification](#)
2. [Log into My Sac State](#)

USE EMAIL LINK

The daily reminder email provides a link to the OnBase Pending Approval Queue. Firefox or Chrome works best with OnBase. If clicking on the link doesn't open up a browser for you, copy the link in the email and past it on a browser. The link will take you directly to the APPRV Department Work Queue.

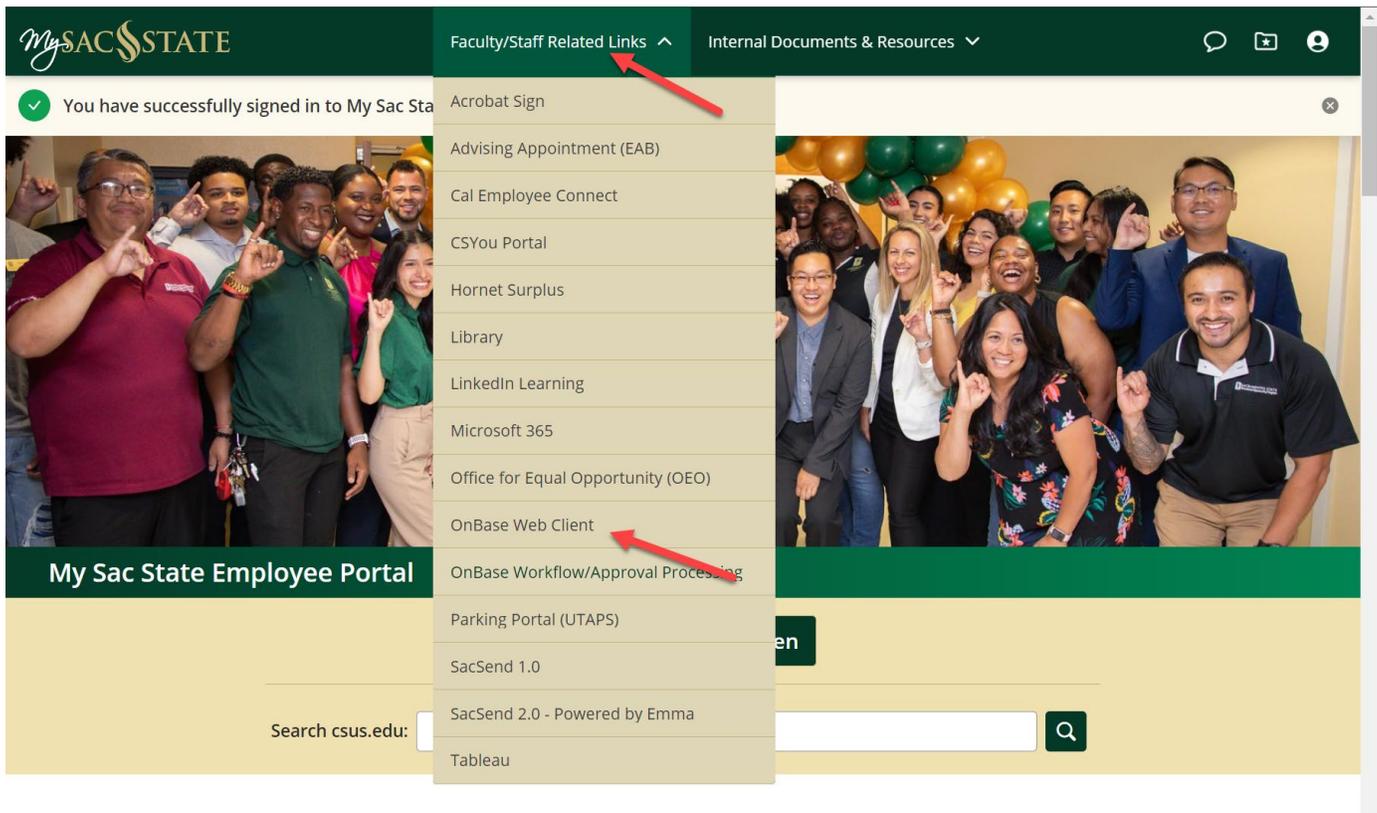
We recommend that you log into OnBase regularly and check for Add/Drop forms in the approval queues regardless of receiving an email or not.





ACCESS FROM MY SAC STATE

1. On your web browser, go to <http://my.csus.edu>
2. Log in with your SacLink account
3. Click "Onbase Web Client" under the Faculty/Staff Related Links



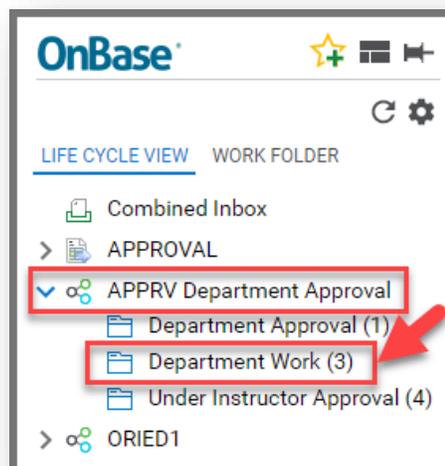
NAVIGATING ONBASE

Once you logged into OnBase, you will be taken directly to the “Approval” queue.

Navigate to the “APPRV Department Approvals” queue, click to expand the workflow to see the Department Work folder.

Depending on your user-group access. You may only see 1 folder. Some staff might have more folders under APPRV Department Approvals work queue

Click on the “Department Work” folder, the Add/Drop forms that are pending your process will display in the Inbox Window.



To view the form, click on the line of the form you want to review.

Click on the form you wish to review

DOCUMENT TYPE	STUDENT ID	LAST NAME	FIRST NAME	DATE
SR - Add/Drop/Withdraw E-Form		LUCAS	NADYA	1/22/2021
SR - Add/Drop/Withdraw E-Form		LUCAS	NADYA	1/22/2021
SR - Add/Drop/Withdraw E-Form		LUCAS	NADYA	1/25/2021
SR - Add/Drop/Withdraw E-Form		LUCAS	NADYA	1/26/2021
SR - Add/Drop/Withdraw E-Form		LUCAS	NADYA	1/27/2021

Items: 6

Complete Cannot Process Student Has Hold

Petition to Add/Drop/Withdraw from Courses

Add/Drop/Withdraw Course Information

Add or Drop/Withdraw from Course?

Student Information

Student ID

First Name

Click **Complete** or **Cannot Process** button, enter the **Comments**, if needed. If “cannot process” is selected, comments are required.

Last Step - Click Complete or Cannot Process

Complete Cannot Process Student Has Hold

Please Note:

Updating the form itself will not move the form out of your pending work queue. You will need to click on the buttons to Complete or deny the request.

Because this is the last step, when the form is processed (or the Cannot Processed button is clicked), the student will get an automated email with the outcome. The comments from the form will be populated in the email. If the form cannot be processed, comments are required but if it has been processed successfully, comments are optional. Below is a sample of a denied email.



Hello Misha Khaykin,

The course add form you submitted on 2/1/2021 for Hist, course number: 10, has been reviewed by the History Department, and unfortunately it cannot be processed.

Notes from the Department:

**Notes from
Departments**

Please reach out to us if you have any additional questions regarding your form or the Add/Drop process.

Office of the University Registrar

CSU, Sacramento | 6000 J St., Sacramento, CA 95819

Tel: 916-278-1000, option 4 | Email: registrar@csus.edu

If the student has a hold, the form is neither processed nor denied. The student is notified the form was not processed because of a hold and the student has 30 days to clear the hold before the form is denied.

If they clear the hold after the 30 days, students must resubmit the add/drop/withdraw form. Note that the spot in the course is not held for thirty days; if all the spots are taken in the time it takes the student to clear the hold, the form will not be processed and the student cannot register for the course.

The screenshot shows the OnBase interface with an 'Inbox' view. A table lists student records with columns for NAME, FIRST NAME, DATE, STATUS, COURSE ID, and COURSE SUBJECT. The second row is highlighted in blue. Below the table, there are filter buttons: 'Complete', 'Cannot Process', and 'Student Has Hold'. The 'Student Has Hold' button is highlighted with a red box.

NAME	FIRST NAME	DATE	STATUS	COURSE ID	COURSE SUBJECT
AS	NADYA	1/22/2021	HOLDS	10021	HIST
AS	NADYA	1/25/2021	HOLDS	30583	HIST
AS	NADYA	1/28/2021	HOLDS	30565	HIST
YKIN	MICHAEL	2/1/2021	HOLDS	36155	HIST
YKIN	MICHAEL	2/1/2021	HOLDS	36156	HIST
YKIN	MICHAEL	2/1/2021	HOLDS	36156	HIST

Items: 6 of 14

Complete Cannot Process Student Has Hold

SACRAMENTO STATE
Redefine the Possible

Petition to Add/Drop/Withdraw from Courses

Student Information

When you click the “Student Has Hold” button, the student will received an automated email shown below:

Hello **[Student Name]**,

The Course Add Form you submitted on **[Form Submission Date]** for **[Course Subject]** **[Course Number]** has been reviewed by the **[Course Subject]**, and unfortunately it cannot be processed at this time because you have a registration hold(s).

For more information on your registration hold(s), please review the “Holds” section of your Student Center. Here, you will find information on the department that placed the hold, as well as specific details about the hold.

We will hold on to your Add Form for 30 days so registration holds can be resolved. After 30 days, you will need to submit a new Add Form.

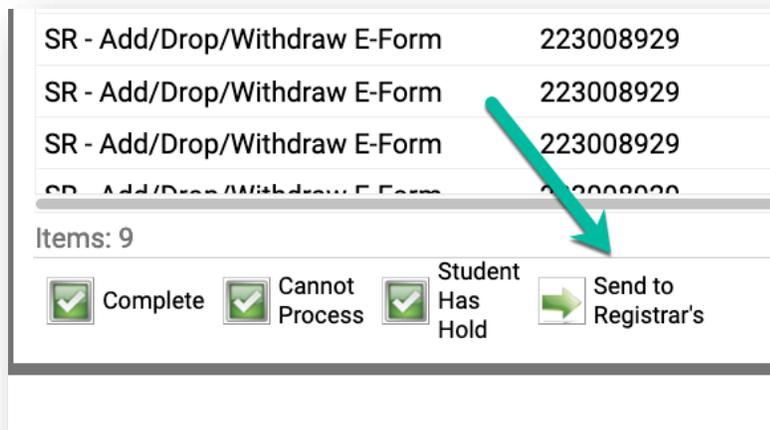
Important:

Submission of this add form does not hold or reserve your seat in the class, and your seat is not guaranteed. It is your responsibility to notify us when your registration holds are removed so your petition can be reevaluated for seat availability and eligibility to take the course.

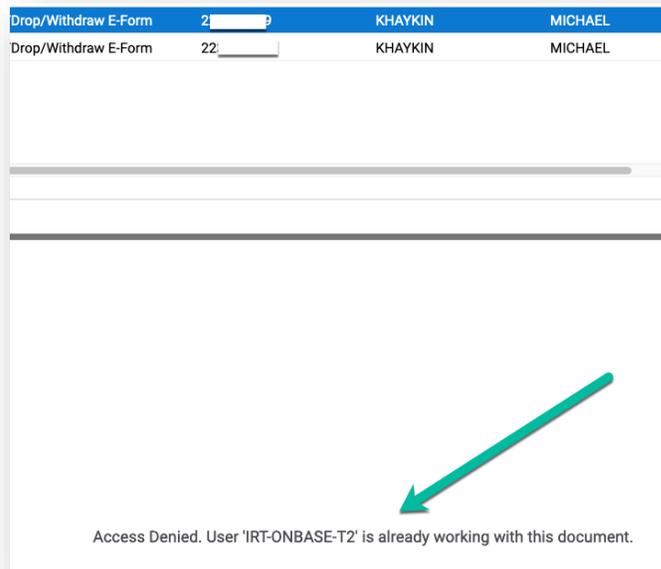
Once you have contacted the appropriate department(s) and your registration holds have been removed, please notify:

- **The [Course Subject] department office during weeks 1 - 4 of the semester.**
- **The Registrar’s Office after week four.**

If a student submits the form too late and the Department can no longer process it, you can send all those remaining forms to the Registrar’s Office for processing. Just click the button “Send to Registrar’s” and the form will go to their queue:



If you click on the form to review and someone else is working on it at the same time, you will see the following message stating that a user is working on the form:



OnBase will lock the form if it is opened by an user. Once the user closed the form then the form will be unlocked for other users to see.

When finished with the forms in your queue, please log out of OnBase *and* close the browser to end the session.

LOOKING UP THE STATUS OF SUBMITTED FORMS

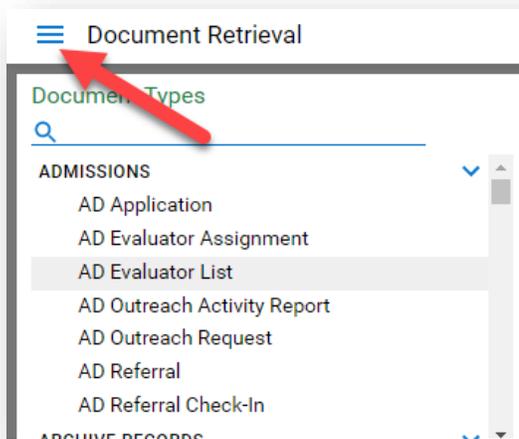
There are times when the staff member needs to know where the form is in the process, the department staff can use Dashboard Report to look up Add/Drop forms submitted within their department.

There are 2 Add/Drop/Withdraw reports available for department staff.

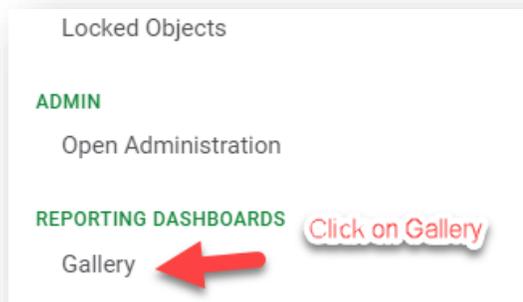
- **Add/Drop by Term** – This report is recommended for staff that are looking for overall statistic of form submissions for a selected date range. This report includes all Add/Drop forms submitted regardless if they are currently in the approval workflow.
- **Add/Drop Workflow Status** – This report is for staff looking to track the current workflow approval status of submitted forms. Submitted forms will be dropped off of this report 2 weeks after it reaches the end of the approval process.

Here we provide an example of how to generate the Add/Drop Workflow status report and users can use the same guideline to generate the Add/Drop by Term report.

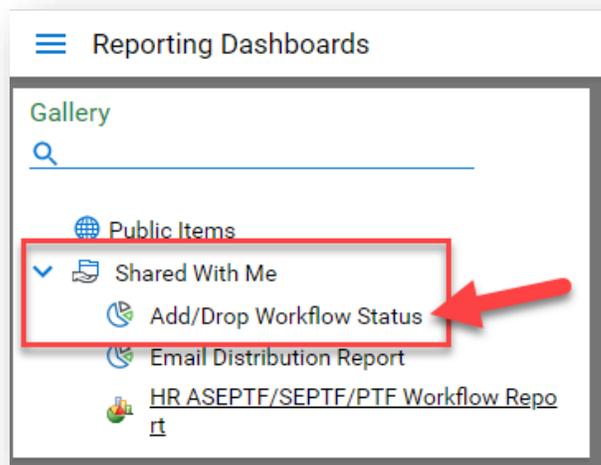
In OnBase Web, click on the Hamburger menu on the top left corner of the OnBase screen.



On the drop down menu, look for "Reporting Dashboards" and click on the "Gallery".



Under the "Shared with me" menu, click "Add/Drop Workflow Status" report



On the pop-up screen, fill in the search parameters and click “OK”.

Important Note:

Depending on the number of records to search, the run time for the report may vary by the search parameters. We recommend that you use student ID number or a date range to limit the search.

The screenshot shows a dialog box titled "Add/Drop Workflow Status" with a close button (X) in the top right corner. Below the title is the instruction "Provide values for the following dashboard parameters". The dialog contains the following fields and controls:

- ADD DROP WORKFLOW** (Section Header)
- EmplID**: A text input field.
- Form #**: A text input field.
- Submit Date**: A date range selector with two calendar icons and a less-than sign (<). Below it is the format "MM/dd/yyyy".
- Form Type***: A dropdown menu with "ADD" and "DROP" options.
- Term**: A text input field.
- First Name**: A text input field.
- Last Name**: A text input field.
- Term Code**: A text input field.
- Save Parameters**
- OK** and **Cancel** buttons at the bottom right.

Once you click OK, you can find the status of the forms.

For status, look for the Document Process Status column to determine the status. You can also look for “Queue Name” to identify where the form is.

Workflow	Queue Name	Approving Instructor	Document Process Status
REG - Forms	Recently Processed	SCOTT PARADY	APPROVED
REG - Forms	Recently Denied	JOHNNIE TERRY	DEPARTMENT DENIED
APPROVAL	Pending Approvals	DREW BRINSON	UNDER INSTRUCTOR APPROVAL
REG - Forms	Recently Denied	MALIA WOMACK	DEPARTMENT DENIED
APPRV Department Approval	Department Work	PATRICK WEEKS	UNDER DEPARTMENT REVIEW

To download the report, click on the “Export” icon located INSIDE the report on the top right corner then select “Export to Excel”.

Export Data
Parameters
ⓘ
↻

Add/Drop Workflow Status

Name	Approving Instructor	Document Process Status	Add/Drop	Term Code	Term	Session	Cou

Fill in the necessary information then click “Export” button. The file will be downloaded and saved to your computer. You can then open the file with MS Excel if you wish to work on the report.

Export To Excel
✕

File Name:

Excel Format: XLSX

Separator:

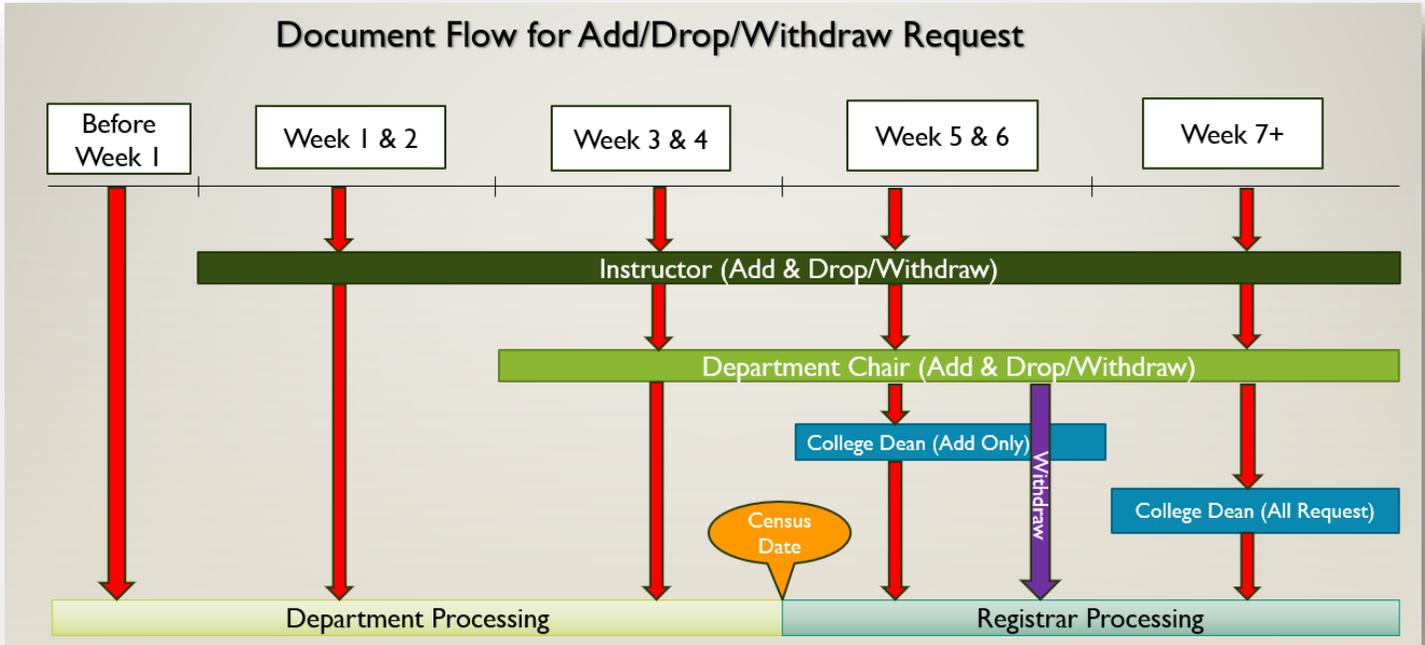
Include: Filters Parameters

Position: Below

Reset
Export
Cancel

TIMELINE FOR ADD/DROP/WITHDRAW FORM WORKFLOW

Depending on the week of the semester, the add/drop/withdraw form will need additional approvers. Below are the approval flow for each term.



ADD FORMS

Before Week 1: STUDENT – DEPARTMENT PROCESSING

Students adjust their schedule via My Sac State or Submit add/drop/withdraw request go directly to Academic Dept staff for processing

Weeks 1-2: STUDENT – INSTRUCTOR – DEPARTMENT PROCESSING

If no instructor is assigned to the course, the add/drop/withdraw request go directly to Academic Dept staff for processing

Weeks 3-4: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR – DEPARTMENT PROCESSING

If no instructor is assigned to the course, the add/drop/withdraw request go directly to Department Chair for approval

Weeks 5-end of term: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR – COLLEGE DEAN – REGISTRAR PROCESSING

DROP FORMS

Before Week 1: STUDENT – DEPARTMENT PROCESSING

Students adjust their schedule via My Sac State or Submit add/drop/withdraw request go directly to Academic Dept staff for processing

Weeks 1-2: STUDENT – INSTRUCTOR – DEPARTMENT PROCESSING

If no instructor is assigned to the course, the add/drop/withdraw request go directly to Academic Dept staff for processing

Weeks 3-4: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR - DEPARTMENT PROCESSING

If no instructor is assigned to the course, the add/drop/withdraw request go directly to Department Chair for approval

INDIVIDUAL CLASS WITHDRAWALS (DROPS AFTER THE 4TH WEEK OF SCHOOL)

Weeks 5 & 6: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR – REGISTRAR PROCESSING

Weeks 7 – end of term: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR – COLLEGE DEAN -- REGISTRAR PROCESSING

-----End of Instructions -----