Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>1</td>
</tr>
<tr>
<td>Request to Consult Form – Using the Forms Editor</td>
<td>2</td>
</tr>
<tr>
<td>- Initiating a Request Overview</td>
<td>2</td>
</tr>
<tr>
<td>- Layout of the Form</td>
<td>3</td>
</tr>
<tr>
<td>- Section 1 – Demographics</td>
<td>3</td>
</tr>
<tr>
<td>- Section 2 – Employment Status</td>
<td>4</td>
</tr>
<tr>
<td>- Section 3 – Information on the Contracting Entity</td>
<td>5</td>
</tr>
<tr>
<td>- Section 4 – Description of the Consulting Activity</td>
<td>6</td>
</tr>
<tr>
<td>- Section 5 – Your Role in Decision Making as a State Employee…..</td>
<td>6</td>
</tr>
<tr>
<td>- Section 6 – Time &amp; Effort Estimates</td>
<td>7</td>
</tr>
<tr>
<td>- Section 7 – Remuneration</td>
<td>8</td>
</tr>
<tr>
<td>- Section 8 – Activity/University Relationship &amp; Other Attachments..</td>
<td>8</td>
</tr>
<tr>
<td>- Section 9 – Routing</td>
<td>8</td>
</tr>
<tr>
<td>- Attestations</td>
<td>9</td>
</tr>
<tr>
<td>- Invalid Information /Required Missing Data</td>
<td>9</td>
</tr>
<tr>
<td>- Successful Form Submission</td>
<td>10</td>
</tr>
<tr>
<td>- Cloning a Request</td>
<td>10</td>
</tr>
<tr>
<td>- Initiating a Request on Behalf of a Faculty Member</td>
<td>11</td>
</tr>
<tr>
<td>Dashboard – Overview</td>
<td>12</td>
</tr>
<tr>
<td>- Viewing Panes</td>
<td>13</td>
</tr>
<tr>
<td>- Layout of the Responses Page in the Dashboard</td>
<td>14</td>
</tr>
<tr>
<td>- Customizing the Format of the Panes</td>
<td>15</td>
</tr>
<tr>
<td>- Application View Window</td>
<td>16</td>
</tr>
<tr>
<td>- Customization Menu</td>
<td>16</td>
</tr>
<tr>
<td>- Filtering Records</td>
<td>16</td>
</tr>
<tr>
<td>- Making Approval Decisions</td>
<td>18</td>
</tr>
<tr>
<td>- Reconciliation</td>
<td>20</td>
</tr>
<tr>
<td>Appendix 1 – Information Concerning Storrs Network Logons</td>
<td>22</td>
</tr>
<tr>
<td>Appendix 2 – Important Data Fields</td>
<td>23</td>
</tr>
</tbody>
</table>
Introduction

The on-line faculty consulting approval system (OFCAS) was developed in order to:

- Facilitate the time it takes to obtain approval for consulting activities.
- Enable requests for consulting to be easily tracked through the approval process.
- Reduce the occurrence of data errors.
- Facilitate the annual reconciliation process.

OFCAS is a web driven system. That means you can access it using many Internet browsers from any location. When using the system, please refrain from using your web navigation tools such as the back arrow. OFCAS is designed to support the Board of Trustees Policy on Consulting for Faculty and Members of the Storrs AAUP Bargaining Unit. This policy, related procedures, and training materials may be found at consulting.uconn.edu. This document concerns the operation of OFCAS and will not discuss the policy and rules.

Please note that by State statute, consulting requests must be approved at least one day prior to the start of the activity. You need to submit requests with sufficient time to allow for full processing. While computer problems do occur and create delays, most often of no more than one day, the most common reason a request is delayed is that one of the approvers doesn’t look at his/her queue of pending request forms. OFCAS provides a mechanism for tracking request forms and if there is a prolonged delay, a requestor may choose to contact the approver to expedite the handling of the request.

OFCAS-3 (On-line Faculty Consulting Approval System, third version) is a rewrite of OFCAS-2 by the UITS Department at Storrs. It consists of two main modules: The Forms Editor and the “Dashboard”.

The Forms Editor enables:

1) The creation and submission of a request to consult form by a faculty member into the consulting approval chain (or if the form has been created by a third-party it allows the faculty member to view, revise, make attestations, and submit such a form.) The Forms Editor also allows a requestor to withdraw a submitted request.
2) Approvers to review request to consult forms and make the following decisions: approved, disapproved, or return to the faculty member or other person in the approval chain for revision.
3) Revision and resubmission of a form by the requestor if it was sent back to the requester by an approver, and
4) Submission of reconciliation data by the requestor when the consulting activity has been concluded.

---

1 Our Information Technology staff suggests using Mozilla Firefox or Chrome as your browser. Internet Explorer is not always fully compatible. When launching OFCAS-3 from an email link, your computer may attempt to use a default browser that is not compatible. In that case you will need to launch and then enter the URL directly into a compatible browser.
2 Or member of the Storrs AAUP collective bargaining unit herein fore referenced to as “faculty” or “faculty member”.

Page 1 of 23
The Dashboard enables:

1) Forms to be tracked through the approval and reconciliation processes, and
2) Quick access to the forms editor.

Please note that the forms editor may be entered either through the dashboard or via links in emails that will be sent to the approvers or requestors when an action is required of them.

REQUEST TO CONSULT FORM – USING THE FORMS EDITOR

The approval process starts with the submission of a Request to Consult form. Each request must be for a single consulting activity within a single fiscal year (July 1 to June 30). A single consulting activity may span many dates, for example, a series of educational presentations, but all must be for the same contracting entity and of similar work. A request can be initiated on-line by a staff member and it will route to the faculty member for final completion and formal submission.

Please note that some of the information on this form will be automatically filled out based on the Storrs Network ID used to access OFCAS. When the form is ultimately submitted by the faculty member, the use of Network logon represents the equivalent of a legal signature. Also note that you can start to fill out a form, save it, log out of the system and come back later to continue inputting information on your form.

Initiating a Request Overview

1. Copy and paste the URL below into your search browser. Note: The system prefers that you use Firefox, Google Chrome or Safari.

http://forms.uconn.edu/apps/ofcas

2. Log-in using your current Storrs Net ID and password. Information about your Storrs login may be found in Appendix 1.

3. Upon successful login, you will directly go to a new consulting activity request form (Figure 1) or to the last request form that you edited but did not submit.

4. Fill in all required data which will be displayed in six tabs across your screen. Please note:
   a. Some of your demographic information will be automatically populated.
   b. In order to move between screens, click “next tab” in the bottom left corner of the page or simply click on a tab at the top of the page that you want to go to. DO NOT USE THE ARROWS ON THE BROWSER TO GO BACK OR FORWARD.
   c. Only one request can be saved at a time.
   d. If at any time you want to exit the request and continue later, click “save draft” at the bottom left corner of the page. A pop up box is generated asking if you’d like to be emailed the link to re-enter the document later. If so, be sure to check that box and an email will automatically

---

3 You will need a separate request for each contracting entity. Please note that there are 14 general categories of consulting. The types of information that will need to be submitted may be different for each of these. Therefore, even if the consulting is for a single contracting entity, you may need to submit more than one request form for each category (e.g. providing a scientific presentation and then providing scientific advice.)

4 Your Storrs email address will be listed. It is not necessary to correct that to your UCHC address.

5 The 7th tab for your reconciliation report will be completed after the activity has been concluded.
be sent to you with a link to the form. If you close the browser without saving the request, a pop up is generated asking if you want to “leave the page” or “stay on page”. Clicking “leave the page” will close the browser tab and your data will not be saved. Clicking “stay on page” keeps you in the current request.
e. Clicking the cancel button on the bottom left corner will erase all the data you just entered but will leave you within the form.

5. Submit your information by clicking on the submit button:

**Layout of the Form**

The Request to Consult form is organized into nine sections, followed by the attestation section and the submit button (which will only appear when all the attestation boxes have been checked off). The Reconciliation section cannot be completed until after the request has been approved and the end date has passed. You may click on one of the tabs at the top of the screen to maneuver within the request form or you may use the “next tab” button at the bottom of the screen. Do not use the arrows in your browser to navigate the form.

Please note that the form includes both required fields of information and optional fields of information:

- You may complete the information fields in any order.
- Questions marked with a red asterisk must be answered.
- There are five formats for providing information:
  
  o Multiple options presented with circle check off boxes: Only one option can be selected.
  o One or more options presented with square check off boxes: Any or none of the boxes can be selected.
  o Text boxes: Type in your text. If there is a maximum number of characters, it will be listed. In some cases, the text box may start with initial text that you can edit.
  o Start and End Date boxes (section 6): When you click on these boxes a calendar will appear and you can select the appropriate date from this calendar. You can also enter them manually.
  o The “Start Upon Approval” box can be checked and the request start date will automatically be entered as the day after final approval is given. If the activity is eligible for “accelerated” approval, the start date will automatically be entered as the day after approval by your department head/dean.
  o File attachments (section 8): You may browse your computer to attach to a single file to your request form. Please use standard file formats to ensure the people reviewing your request can open the file.
- Depending on your answers to the questions, additional questions may appear. **It is critical that you select the appropriate category of consulting so that the correct additional questions appear.** If you don’t do this, the consulting form will be sent back to you and thereby delay final approval.
- Short information boxes are available by moving your cursor on different areas of a page.
- Information from a previously submitted form may be cloned (see Figures 8 and 9).

**Section 1 – Demographics (Figure 1)**

This information is automatically populated based on the data associated with your Storrs Network ID. These data are updated by a feed from the Human Resources payroll system. If this information is incorrect, please inform your HR Department. The Storrs email address cannot be changed.
Section 2 – Employment Status (Figure 1)

Appointment term – please note that all Health Center faculty are on 12 month terms. The majority of Storrs faculty are on 9 month appointments. Additional months for administrative duties would be a 10 or 11 month appointment. Summer salary is not included in appointment length and is handled as a separate question.

**Figure 1 - Demographics & Employment Status**

[Image of form for Request for Approval of Consulting Activities]
Section 3 – Information on the Contracting Entity (Figure 2)

Enter the name and address of the entity that is directly paying the faculty member. Check one of the options for “Nature of contracting entity.” These categories in conjunction with other data entered later in the form, will determine if the request is eligible for "accelerated" routing. Please note that the “Non-Profit Entity…” and “Profit Making Entity …” options generate text boxes requiring a description of the nature of the contracting entity.

Figure 2 – Information on the Contracting Entity

Request for Approval of Consulting Activities for Faculty (including administrators with faculty titles) and Members of the AAUP Bargaining Unit

* Entity Name

* Entity Address

* Nature of the contracting entity (select one)
  - U.S. governmental agency (federal or state)
  - National, regional or state professional society
  - Higher education unit - Accredited in the US
  - Higher education unit - Accredited in another nation
  - Accreditation granting agency
  - Non-Profit Entity other than what is listed above (for example: United Way, American Heart Association, Bristol Hospital)
  - Profit Making Entity other than what is listed above

Complete the following boxes only if they apply to the above contracting entity:

- I am a member of the contracting entity’s board
- A member of my family (spouse, child, parent) or I have at least 5% ownership interest in the contracting entity. (Please explain the interest below)
- The contracting entity is a University start-up company or is a faculty-affiliated company (i.e. [i] it has licensed University Intellectual Property (UIP) in which I am an inventor, and/or [ii] I am a founder, owner, or scientific advisor).

---

Section 4 – Description of the Consulting Activity (Figure 3)

Choose a consulting activity category. Your choice may bring up a text box requiring more information. Please do not click #14 “Other” when one of the other 13 boxes describes your activity. This can slow up the processing of your request form if we need to send it back to you to check off special attestations that only appear when you pick the correct activity category.

**Figure 3 - Description of Consulting Activity**

Sections 5 – Your Role in Decision Making as a State Employee (Figure 4)

You must indicate whether you make or influence decisions that might be perceived as benefiting the contracting entity. Please note that UCHC does not consider writing prescriptions as making purchasing decisions, but establishing a formulary would.

You must check the square box if you work under a U.S. Department of Health Public Health Services (PHS) grant/contract (which includes the National Institute of Health) AND travel expenses will be paid directly or indirectly by the contracting entity. (Do not check the box if the contracting entity is a U.S. federal or state governmental agency.)
Section 6 - Time & Effort Estimates (Figure 4)

You must report on both the amount of effort the consulting activity will require as well as when the activity will take place. While the total effort during "normal work time/days" may be zero, the total effort for the whole consulting activity can never be zero. It is to your benefit to estimate high in that if you take extra time consulting you are doing so without permission.

If you consult during normal work time, you must have prior permission for the specific days taken (i.e. as opposed to a total effort for the activity). This permission may be obtained either with the Request to Consult form or after the activity is approved. If the latter, you must retain written documentation that you received prior approval from your department head in case the auditors ask you to produce such documentation.

Figure 4 - Decision Making Role & Time/Effort Information

Section 7 – Remuneration (Figure 5)

Compensation over $5,000 may need to be reported to the Individual Conflict of Interest Committee.
Section 8 - Activity/University Relationship and Other Attachments (Figure 5)

You may attach a single document to the form. If you have multiple documents to attach and they are not excessive in size, we suggest combining them into a single document. If they are too large, you will see an error message. Once you attach a file, if you need to delete it, click on the “X” to the right of the document name.

Figure 5 – Remuneration, Use of State Resources and Other Information

Section 9 – Routing (Figure 6)

Select if you are a Storrs+ or Health Center employee and then select which level you are within the University Organization (i.e., faculty/staff, department head or Dean/Unit Head). OFCAS will automatically look up your default routing path to obtain all necessary approvals for your consulting.

Figure 6 - Routing
Check all four attestations and click on the “submit” button. This button is circled in red at the bottom of Figure 7.

**Figure 7 – Attestations**

If there are any required data missing on the form, an “invalid information” popup box will appear. It will list in red font the missing data. You can then go back to the form, enter these data, and then resubmit the form (remembering that all attestation boxes must be checked.)
When the form is successfully received, a “Your data has been successfully submitted” popup box will appear(Figure 9).

When submission is successful, you will be automatically routed to the Dashboard. You should also receive an email stating that your request has been successfully submitted.

**Cloning a Request:**

To clone a request, go to the online consulting request form (Figure 1). At the top of the “Personnel Details” page, click on the button “Clone a request” (circled in red on Figure 10) which generates a list of previously submitted consulting requests (Figure 11).
Click on the identification number of the request you wish to clone and then on “clone selected request” button. The majority of the previous form’s information will be copied entered into the new form. You will need to complete the appropriate attestation in Section 4 “Activity Description” and complete the information in Sections 5 through 10.

**Initiating a Request on Behalf of a Faculty Member:**

A request can be initiated on-line by a staff member and it will route to the faculty member for final completion and formal submission. To initiate a request on behalf of a faculty member, go to the forms editor to create a new request (Figure 1). In Section 1 “Demographic Information”, click on the button “Click if this request is for someone else” (circled in red on Figure 12) which generates a pop up box (Figure 13).
Type in the first and last name of the faculty member and click “search” to generate a list of corresponding names. Check the appropriate bubble next to the name (Figure 13) and the system will automatically fill in the appropriate demographic data and return to the Personal Details page.

Once the form is completed, it will route to the faculty member for final completion and formal submission.

**DASHBOARD - Overview**

The Dashboard enables:

1) Forms to be tracked through the approval and reconciliation processes, and
2) Quick access to forms editor.

The dashboard may be accessed by clicking on the link below. Depending on your browser and other system settings, you may need to copy and paste this link directly into your browser rather than just clicking on it. Please note that OFCAS-3 performs better with Google Chrome, Safari or Firefox than it does on Internet Explorer, and the version of your browser and your personal settings/plugins may impact on this performance. Prior to reaching the dashboard, you will be prompted to provide your Storrs
Net ID and password. This is the same logon used for OFCAS-2. Information about your Storrs network logon may be found in Appendix 1.

http://forms.uconn.edu/apps/ofcas-dash

The dashboard consists of two pages: a) “Summary” (which isn’t relevant to the faculty consulting approval process), and b) “Responses” which is the portion of the dashboard that should be used. These pages can be selected by clicking on the tabs at the top left of the screen (circled in red in Figure 14).

At the top left of the Responses page are options (see the red rectangle in Figure 14) for customizing the look and feel (i.e. formatting) of the page, filtering/searching for records, refreshing the data, and exporting the data to Excel or other file formats. Please do not use the Launch button to attempt to go to the forms editor or the Export button since both will result in problems based on your choice of browsers and settings.

**Viewing Panes**

In addition to the traditional web/window navigation tools for moving between screens (assuming that the contents of your data exceed a single screen), the dashboard has two main “panes”. The first, the “list” pane will be on the left of your screen. It contains a list of all consulting activities that you have permission to view (one per row). The second pane will be on the right side of your screen and it displays the contents of a single, selected request form. This second pane is basically a window showing the forms editor.

Please note:

- You have the option to eliminate this second pane on the right and instead have the contents of a selected request appear in a new window (called the “Application View”, see Figure 14). We strongly recommended this second approach since it allows the user to see the whole width of a request form without the need to scroll horizontally across it. See the instructions below to customize your screen to select this option.

- A form can be selected for viewing by clicking anywhere in its row of data on the list pane on the left side of your screen. (Exception: if you click on the data in the “author”7 or “email” fields this will open an email to the person who you selected.) When you move the cursor into a row, it will be highlighted. **There can be a 1-12 second delay before the form opens.**

The request forms displayed in the list pane will include your personal request forms (i.e. for consulting that you will perform yourself), the forms that require action by you, or any form that has completed the entire approval process for persons who you have the responsibility for approving/disapproving requests to consult. You have the options of viewing all these requests or to set “filtering” criteria to only view a subset of forms that you are eligible to view. Instructions on filtering are provided below.

Each request form that you can view will be displayed in a single row in the list pane. All the fields of data associated with that record will be displayed in the columns. You may click on a column header to sort all the displayed forms by that field. If you click a second time on the column header, it will sort it in reverse order (i.e. the first click will sort from low to high and the second click will sort from high to low.) Instructions on how to control the display of data fields are provided below.

---

7 An “author” is the person who first started creating the request form. This could be the faculty member or another person, for example, an administrative assistant. The “email” field is the email address of the faculty member.
Figure 14 – Layout of the Responses Page in the Dashboard
Figure 15 – Application View Window

Customizing the format of the panes

There are three major options for customizing the appearance of your screen:

a. Fields to be displayed – for the list pane, you may indicate which of the data fields to display and which to hide. A list of important field names may be found in appendix 2. Please note that a more readable description of the consulting activity will be displayed in the Application View.

b. View a selected form in the viewing pane on the right side of the screen or in a new window. It is strongly recommended that you select the former option (see the red circle in Figure 16)

c. Save any sorting & filtering options that you have set (instructions on these topics is provided below.) It is strongly recommended that you select this option (see the green circle in Figure 16.)

In order to select these choices, click on the “Customize” button at the top left of the dashboard. A “view properties” menu will appear (see Figure 16 which shows the bottom portion of this.) Use the check boxes and finalize all your changes by clicking on the “OK” button. You can click on the “Apply” button to see your changes, but they will not be finalized until you click the “OK” button.

The list of possible data fields is so long that there is second vertical scroll bar to the right hand side of this list to allow you to scan through them. You may wish to start by using the “Hide All” button and then only select the few fields that interest you. While you cannot change the order in which the fields appear across the list, you can change the field widths by pointing at the edge of field heading (in the list pane) and dragging to the left or right.
As described above, when you click anywhere in the row of data in the list pane, the full contents of that consulting request form will appear in the Application View (see Figure 15.)

Requests displayed in the application view can be printed (see the red circle in Figure 15), but the attestations will not be included. Those attestations may be found on the consulting website: http://consulting.uconn.edu. The delete records button (green oval) is inactivated since consulting requests cannot be deleted from OFCAS by users or approvers.\(^8\)

Please remember that the Application View is really the Forms Editor.

### Filtering Records

A user of the dashboard can select a subset of request forms to list.

There are two methods for selecting a subset of requests to display rather than listing all the requests you are eligible to view:

1. **Pending requests** – A person may wish to only view activities that are still in the approval or reconciliation processes. The “Hide complete data records” button will hide all records that have

\(^{8}\) A faculty member may withdraw a request and systems administrators may delete records that are hung up or are errors.
completed the entire approval process and have been reconciled. See the green circle on Figure 14. This is a toggle button which can be reversed by clicking on it a second time.

2) Boolean searches – Use of simple Boolean logic to select records to display. It is anticipated that this feature will most likely be used by those persons with access to a large number of requests forms (i.e. department heads, deans and the provost’s designees.)

To begin a search, use the “Create Filters” button (see the red rectangle in Figure 14.) A search is comprised of one or more simple logic rules in which requests are selected if the value in a data field meets the stated condition of the target value. Multiple logic rules can be tied together using the AND or OR functions. The AND function requires all the simple logic rules to be true in order for a request form to be displayed and the OR function requires only one of the simple logic rules to be true.

The simple logic rules have three parts and are formatted as: If FIELD-NAME OPERATOR VALUE where:

- FIELD-NAME – The name of the one of the fields of data (see the red circle)
- OPERATOR – Defines the comparison being made. The choice of operators will change based on the type of data being considered. For text data, the operators are “equals” or “does not equal”. For dates, the operators are “before” a date, “after” a date, or “between” two dates. For numerical data, the operators are “less than”, “greater than”, “equal to”, and similar terms (see the green circle)
- VALUE – is the target you are using (see the blue circle.)

The example in Figure 18 is a search for all activities with a start date between May 1 and May 31. The same search could have been accomplished with a single logical rule using the “between” operator.

Once a filter has been put into place, a message will appear to indicate that. You will also be given an option to clear the filter in order to view all records. (See the red circle in Figure 18.)

---

9 At this time, OFCAS-3 does not have any built in reports. It is anticipated a report writer will become available with the next release of the software. Until then, reports may be generated by exporting OFCAS data into other applications such as Excel. Note that OFCAS-3 can only save one set of search terms at a time and if you want a different search, it will need to be hand entered.

10 A given search can only use one, but not both of these functions (i.e. there may be three rules joined by AND or there may be two rules joined by OR, but the use of both AND and OR in the same search is not permitted.)
Making Approval Decisions

Department heads, deans, and the provost’s designee will all have to make decisions whether to approve or disapprove a request to consult. They can also return the request form, with comment, to the requestor or any of the previous people who have approved the request.

Approval decisions are recorded in the “Application view” (i.e. using the Forms Editor.) There is an approval section inserted into each request form (just scroll down to see it), and the same options are available as were in OFCAS-2.

Figure 19 displays the approval section for a department head level decision. In this case, OFCAS-3 has automatically determined the activity is eligible for accelerated approval.

Figure 20 also displays the approval section for a department head level decision, but in this case the decision is being recorded by a proxy and the request is following the regular approval process. The request is being sent back to the faculty member for revision.
Reconciliation

University policy requires all faculty members who were engaged in a consulting activity in a given fiscal year to complete a reconciliation report for all consulting activities for which they have received approval. If the estimates regarding anticipated time spent on each activity and the compensation range provided when requesting permission to consult do not reflect what actually occurred, such information should be revised appropriately.

This requirement applies even if the consulting activity never took place. A reconciliation cannot be completed until after the form has been approved and the start date has passed. However, you can reconcile a consulting activity any time after the end date of the activity (i.e. you don’t need to wait for the close of the fiscal year to do so.)

To reconcile an approved request:

1. Copy and paste the URL below into your search browser to bring you to the Dashboard. NOTE: The system prefers that you use Firefox, Google Chrome or Safari.

   http://forms.uconn.edu/apps/ofcas-dash

2. Log-on with your Storrs Net ID and password:

3. Select the activity you wish to reconcile by clicking on the request in the Stage column (circled in red) showing “Reconciliation.” See Figure 21.

   Figure 21

   ![Figure 21](image_url)

4. Indicate under “Activity Status” if the activity took place (circled in red). If the activity did not take place, you still need to reconcile the request and indicate the activity did not take place. See Figure 22.

   Figure 22

   ![Figure 22](image_url)
5. If you check that the activity did take place, you will then be asked to indicate whether any of the displayed information has changed from when you first obtained approval to consult. A request can be reconciled prior to the “Actual End Date” but not before the “Actual Start Date”. You will also need to indicate whether all necessary reimbursements were made, and to “electronically sign” the report by hitting the “Submit Reconciliation” button. If there are no changes, simply hit “Submit Reconciliation”.

Repeat steps 3-5 for each activity.
Appendix 1

Information Concerning Storrs Network Logons

OFCAS operates on the Storrs IT network and to use it, you must have a Storrs logon (Network ID and password) (see Figure A). Network logons are created when your name is entered into the payroll system. If you need a logon prior to employment, contact the Faculty Consulting Office. Network passwords must be kept confidential and may not be shared. If you need assistance with your Net ID or password, please call 860/486-HELP (4357).

- If you don't know your Storrs Network ID, please access: https://netid.uconn.edu/find_netid.php
- If you know your Storrs Network ID but have never activated it, please access: https://netid.uconn.edu/activate.php
- If you ever forget your password for your Storrs Network ID you may reset it at: https://netid.uconn.edu/reset_password.php

Figure A - Net ID Sign-on

[Image of Net ID Sign-on]
Appendix 2

Important Data Fields

ID
The unique number assigned to each consulting request for the purpose of identification.

Stage
The status of the consulting request in the approval tree.

1. **Start** – Form has been started but not submitted.
2. **On behalf of Attestation** – Form was started by someone other than the faculty member is now awaiting the faculty member’s review, sign off for the attestations and formal submission.
3. **Approval Dept** – Form is awaiting the department head’s action.
4. **Approval Dean** – Form is awaiting the dean’s action.
5. **Initiator Return** – Form was returned to the faculty member or other person in the approval chain and is awaiting their action.
6. **FCO Review Storrs** - Form is awaiting review by the Faculty Consulting Office staff.
7. **FCO Review UCHC** - Form is awaiting review by the Faculty Consulting Office staff.
8. **Approval Provost** - Form is awaiting the provost’s designee action (Storrs+), or the EVP for Health Affairs’ designee (UCHC).
9. **Reconciliation** – Form is ready for reconciliation to be submitted by the faculty member.
10. **Review Reconciliation Storrs** – Reconciliation form is awaiting review by the Faculty Consulting Office staff.
11. **Review Reconciliation Health Center** - Reconciliation form is awaiting review by the Faculty Consulting Office staff.
12. **Reconciliation Return** – Reconciliation form was returned to the faculty member and must be revised and resubmitted.
13. **End** – All actions have been completed.

Author
The person who initially began filling out the request form. This could be the person who is consulting or someone who is helping that person complete the form.

The Earliest Date
The earliest date the consulting activity will begin in the fiscal year.

The Latest Date
The latest date the consulting activity will take place in the fiscal year.

Total Number of Days
The estimated total effort in days (each day is considered to be 10 hours.)

Maximum Number of Days
The subset of total effort that will be performed during ‘normal work time’.