

Quick Start Guide

To the Upgraded Online Faculty Consulting Approval System (OFCAS4)

September 2020

Logging into the System (this has a new URL, but will remain directly linked from our consulting website)

1. Use the link on the main page of the consulting web site: <https://consulting.uconn.edu/>.
2. Enter your NetID (Storrs Network-ID)

Dashboard (see the screen image on the next page, the **purple** letters are labels described below)

This is a single page displaying all the relevant information you need to manage your consulting requests. It includes the following:

- A. Your name and department (label **A**.)
- B. A message from the Faculty Consulting Offices that might change from time to time (label **B**.)
- C. A link to create a new faculty consulting request or to return to a request that you started to create but haven't submitted yet (label **C**.) As with the old system, you may only create one request at a time.

Note: the new system does not support cloning of old requests nor does it allow other people to fill information into the request from for you. Further information about the request form can be found below.

- D. Lists of active consulting requests that you have submitted, or those needing approval from you in your role as a department or dean level approver:
 - **Red** list (**1a** and **1b**): requests that require your immediate action
 - **1a**: Only department and dean level approvers will have activities in this list. These are requests that require their review and a decision to be made whether to approve, disapprove, or return a consulting request.
 - **1b**: requests that you submitted and were returned to you by an approver asking you to revise the request. You need to make such a revision and resubmit the request. You may also withdraw the request.
 - **Yellow** list (**2**): requests you submitted but have not received final approval yet. You can track the request through the whole approval process. When final approval is granted, you will receive an email from the system telling you so. Remember, do not begin work on activities listed here until final approval is issued.
 - **Green** list (**3**): requests you submitted and were approved and now require you to submit a reconciliation report. Such reports can be submitted as soon as you finish the activity, but no later than two months after the fiscal year the activity is in ends.
 - Note: To view the actual consulting request, click on the icon of a page (label **D**.)

A Wetstone, Scott - Public Health Sciences

B Faculty Consulting Dashboard

This is a test of the system message. Watch here for any updated information.

C [Click to create a new consulting request](#)

[Refresh Dashboard](#)

1a: CONSULTING REQUESTS WAITING MY APPROVAL

ID	Submitted Date	Faculty Member	Start Date	End Date	Approval Path	Stage	Contracting Entity	View Request
20-OATL-8ONIDZ	2020-09-11	Michael Oatley		2020-09-25	Low Col Risk	Department Review	ghfg	D

1b: CONSULTING REQUESTS WAITING MY REVIEW

ID	Submitted Date	Start Date	End Date	Approval Path	Stage	Contracting Entity	View Request
No Consulting Requests to display							

2: MY CONSULTING REQUESTS THAT ARE STILL AWAITING FINAL REVIEW/APPROVAL – Do not work on this activity until final approval occurs

ID	Submitted Date	Start Date	End Date	Approval Path	Stage	Contracting Entity
20-WETS-DANMES	2020-08-12		2020-09-30	Regular	FCO Review	test ABBA

3: MY CONSULTING WAITING RECONCILIATION - Reconciliation can only take place after start date unless reporting consulting is not taking place

ID	Fiscal Year	Start Date	End Date	Contracting Entity	View Request
20-WETS-5PY998	2021	2020-08-20	2020-09-30	test Entity name	D
179721434738	2021	2020-07-01	2020-12-17	American College of Physicians	
188499207956	2021	2020-07-01	2020-12-31	Pfizer Inc.	
179453313768	2021	2020-07-01	2021-06-30	NRECA, Mindyra, CeCN, Common Sensing and In-Care	

The New Request Form

While the new request form has a cleaner appearance, it mostly contains the information previously obtained with the old form. There are some deletions too.

Important new data fields are:

- A. *“Are you an employee of UConn Health?”* Your answer should be based on whether you are being paid through the UConn Health or UConn payroll systems.
- B. *“I have a faculty title and I am a management-exempt faculty member.”* This applies to faculty exempted from being members of the AAUP collective bargaining units. If consulting takes place during normal work time, additional documentation is required to ensure these faculty are fully performing their State duties. Management-exempt faculty includes department heads at UConn Health, but Storrs and regional faculty who are department heads are usually still members of the AAUP. If you are unsure of this question, please ask your Faculty Consulting Office or HR.

- C. *“Is the source of compensation being paid to you from an International source?”* New Federal guidelines require the University to carefully consider these situations. This question is not asking you for the physical location where the consulting will take place, but about the contracting entity.
- D. *Nature of consulting activity.* Please note there is a new category: *“Patient Care.”*
- E. *Will there be material use of State resources:* A different form of documentation is being required to demonstrate you have permission to use these resources and reimbursement to the State will take place.