

Additional Information for Department and Dean Level Approvers

Upgraded Online Faculty Consulting Approval System (OFCAS4)

September 2020

As described in the general [quick-start guide](#), department head and dean level approvers will need to pay close attention to queue 1a since these are consulting requests that require their review and approval. While they should also receive emails from the system each time a request is added to this list, we strongly encourage these approvers to routinely check their dashboards at least once a week to avoid missing a pending activity.

You may **access a request** by clicking on the page icon in the far-right hand corner (*label D* on the screenshot on page 2 of the [quick-start guide](#)). When you open such a request, you will see the submitted request form that is multiple pages long that you can tab through (see the top screen image on the next page). The approval options are at the bottom of the first page (see *label E* on the bottom screenshot on the next page).

Approval options

As in the old system, you can approve a request, disapprove it, or send it back to an earlier step in the approval chain. You may also indicate if you are a proxy rather than an approver. You may also leave a comment.

New to the system is the ability to insert some commonly used language into the comments box. This is done through the pull-down menu above the comments box. This is totally optional. If you have standard language you would like to add to this list, please alert your faculty consulting office.

Summary/Print View

Rather than tab through the entire request form, you can change the formatting of the information into one rolling list by clicking on the Summary/Print View button (*label F* in the top screen image on the next page.)

Two screen images demonstrating how this looks are on page 3. Note, the approval log (*label G*) is contained in the bottom of the listing if you are looking for it.

Note: at this time, you need to close this view and return to the normal form view to enter your approval decision.

[Print](#) [Delete Record](#)

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

Important Information - please read prior to filling out the form

- You may not start work on this consulting activity until you have received final approval.
- Fields marked with asterisks (*) ARE REQUIRED.
- For help, see the instructions at <http://consulting.uconn.edu> (this includes contact information of staff who can answer your consulting questions).
- Do NOT use the back arrow in the browser to navigate through the form (you will lose your data).
- You can move through the screens by single clicking on the tabs at the top of the window or by using the previous/next buttons at the bottom of the window.
- There is an open ended text box at the end of this form for making any necessary additional comments you wish to make about this activity.

Request ID

20-OATL-8ONIDZ

F

[Summary/Print View](#)

Personal Details	Entity Details	Activity Details	Role Details	Activity Dates	Compensation Details	Resources/Attachments																		
<p>Demographic Information</p> <table> <tr> <td>* First Name</td> <td>* Last Name</td> <td>* NetID</td> </tr> <tr> <td>Michael</td> <td>Oatley</td> <td>mio02003</td> </tr> <tr> <td>* Email</td> <td></td> <td>U-Box/MC</td> </tr> <tr> <td>michael.oatley@uconn.edu</td> <td></td> <td></td> </tr> <tr> <td>Department</td> <td>* Location</td> <td>Telephone</td> </tr> <tr> <td>Enterprise Applications</td> <td>Storrs</td> <td>+1 860 486 0483</td> </tr> </table> <p>Employment Status at the University</p> <p>* Are you an employee of UConn Health? ?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>							* First Name	* Last Name	* NetID	Michael	Oatley	mio02003	* Email		U-Box/MC	michael.oatley@uconn.edu			Department	* Location	Telephone	Enterprise Applications	Storrs	+1 860 486 0483
* First Name	* Last Name	* NetID																						
Michael	Oatley	mio02003																						
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What is your percent effort working at UConn? [?](#)

* Work Effort

Over 95% time 50% to 95% time Less than 50% time

* I have a faculty title and I am a management-exempt employee [?](#)

Yes No

[Previous Tab](#)

[Next Tab](#)

Approval

* Approval Status Approve Return Deny **E**

I am the proxy for the official approver of this consulting request.
I have forwarded the information contained in this request to the official approver and I am now accurately recording that person's decision. I am keeping a written paper trail with dated documentation of the official approver's decision regarding this request.

Choices to append to approval comment

Approval Comment

[Cancel](#)

Request for Approval of Consulting Activities for Faculty and Members of the UConn AAUP Bargaining Unit

Request ID 20-OATL-8ONIDZ

Personal Details	
First Name	Michael
Last Name	Oatley
NetID	mio02003
Email	michael.oatley@uconn.edu
U-Box/MC	
Department	Enterprise Applications
Location	Storrs
Telephone	+1 860 486 0483
Are you an employee of UConn Health?	No
How many months are you expected to work each year?	12 months
Work Effort	Over 95% time
I have a faculty title and I am a management-exempt employee	No

Entity Details	
Entity Name	ghfg
Entity City/Town	fgh
Entity State/Region/Province	fgh
Entity Country	fgh
Is the source of the compensation being paid to you from an International (i.e. not. U.S.) source?	No
Nature of contracting entity	3 Higher education unit
Do you have an affiliation with this entity?	Yes
Type of Entity Affiliation	I am a member of the contracting entity's board. A member of my family (spo
Entity Affiliation Description	test

Activity Details	
Nature of Consulting Activity	2) Make an educational (non-promotional) presentation.
I have control of the content, and educational materials(including but not limited to the handouts, slides, and/or the selections of journal articles or case reports to be used); if a product or service is discussed, there will be a fair and balanced presentation of alternative products and services; and if the contracting entity is for profit, the educational materials will not bear the name or logo of contracting entity or other third party except that it may be used once at the beginning and once at the end to acknowledge the financial support.	No
Activity Detail	dgh

Activity Dates	
In which fiscal year is this consulting taking place?	FY2021 - July 1 2020 thru June 30 2021
Check this box if you wish to use a start date upon approval	Yes
Expected Start Date	
Expected End Date	9/25/2020
This is a late request	No
Total time spent consulting (regardless of when they will be performed.)	1
Subset of the total number of days consulting that will take place during normal work time.	0
I expect this consulting may take place while I am on summer salary from a grant.	No

Remuneration Details	
My level of compensation for this Activity is:	\$0
Remuneration I am receiving is at market rate for services rendered.	At The Market Rate
Will your yearly compensation from this contracting entity be greater than \$5,000?	No

Resources/Attachments	
Will there be material use of University resources?	No
Other Attachment	

Routing/Approvals	
Select which level you are in the organization	Faculty
Routing Location	Storrs
Approval Path	Low Col Risk
Select School	School1
Select Department	dept1
Approval Date	
Approved Status	

Activity Log				
Activity Log	Actor	Action	Time	Comments
	Oatley, Michael	Submit Consulting Request	9/11/2020, 2:57:02 PM	Type: Low Col Risk



Attestations	
I certify that:	Yes
When consulting, I understand that:	Yes
To the best of my knowledge, my involvement with this consulting activity:	Yes