Payroll eForms
Training & User Guide

The eForms User Guide will cover accessing Payroll forms via TitanOnline.
Table of Contents

Navigating to Payroll eForms ....................................................................................................................... 3
  Search for an eForm ........................................................................................................................................ 5
Completing the CMS 634 Employee Attendance Form ......................................................................... 6
Completing the CMS 634 Employee Attendance Form for Department Members as a Timekeeper ................................................................. 9
Completing a Student Timesheet Form ...................................................................................................... 10
Completing a Student Timesheet Form as a Timekeeper ........................................................................ 15
Completing a CD048 Student Asst Attendance – Distributed Form as a Timekeeper .................. 18
Completing a OT & SD Request Combo-New Form as a Timekeeper .............................................. 21
Retrieving eForms Using Search Templates: ......................................................................................... 24
  Individual Staff Payroll eForm Search ................................................................................................. 24
  CD048 Student Asst Attendance ........................................................................................................... 27
  Student Timesheets eForm Search ........................................................................................................ 29
Changing the Size of a Form (Zoom) ..................................................................................................... 31
Saving a Form ........................................................................................................................................ 33
Printing a Form ...................................................................................................................................... 35
Closing a Form ......................................................................................................................................... 36
Checking In an eForm ............................................................................................................................... 37
eForms is a web-based system for CSUF employees to submit a variety of campus forms. This system, which is accessible via the campus portal, will gradually replace Informed Filler.

It is highly recommended that you use Internet Explorer 7 or Safari with eForms.

**Navigating to Payroll eForms**

**Step 1:**
Open your browser and log into the campus portal at www.fullerton.edu.

**Step 2:**
Select the Titan Online tab.
Step 3:
Select the **My Workplace** link. It is located in the bottom left corner of the screen under “eContent”.

Step 4:
Depending on your access, you may see Financial Reports and/or HR Reports in addition to eForms content.

Open the **eForms - Human Resources** section. eForms are divided into sections based on the types of forms.

Step 5:
Once a selection is made, additional folders will appear. Select the **Payroll** folder.

Step 6:
The folder will open in a new browser window. You will see 3 folders:
- Department Summary Forms
- Student Timesheets 2008-2009
- Student Timesheets 2009-2010

All of the Payroll eForms are either in one of the 3 folders or in the list of the other staff payroll forms below them.
Search for an eForm

If you are not able to find the form you wish to use, use the search feature to find it.

**Step 1:**
Select **Search All Form Templates** on the eForms homepage.

**Step 2:**
The Search View opens in a new window.
Enter the search criteria. Users may enter a full or partial eForm name (Document Title) and/or a full or partial form description.

Then click **Search**

**Step 3:**
The search results appear at the bottom of the page.
Click on the form name to open it.
Completing the CMS 634 Employee Attendance Form

**Step 1:**
Navigate to CMS 634 - Distributed. Click the form name to open it.

**Step 2:**
The form opens in a new browser window.

After a few seconds, the form will automatically populate with your information (Name, Empl ID, Empl RCD#, SSN, SCO Position Number, Dept ID, Dept Name).

⚠️ If the information that is automatically populated is incorrect, please contact Human Resources Services.

Complete the rest of the form as required.
**Note:** Sections appearing in green indicate lookup fields. Enter the appropriate information in the green box and the form will automatically populate.

The sections appearing with red box(es) are required fields.

⚠️ Forms cannot be saved or printed without information in the required fields. For the CMS 634, all the required fields are automatically populated except for the **Month** and **Year**.

**PAY PERIOD**

<table>
<thead>
<tr>
<th>MONTH</th>
<th>YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Step 3:

Once you are done filling out the form, click PDF to print the form.

The form will open in Adobe Acrobat reader and you can click PDF to print.

You can also save a static version of the data filled form as a PDF on your desktop by clicking PDF in the Adobe Acrobat reader window.

After printing the form in eForms, click Save to save it in eForms. **Note:** This will automatically close the form window.

**Note:** If you have not saved the eForm first and click the Close button, the window will automatically close and the form with its data will be lost.

For how to retrieve your timesheet, see section “Retrieving eForms Using Search Templates”.

<table>
<thead>
<tr>
<th>Date</th>
<th>Timesheet Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2023</td>
<td>8:00 AM - 5:00 PM</td>
</tr>
<tr>
<td>1/2/2023</td>
<td>8:00 AM - 5:00 PM</td>
</tr>
<tr>
<td>1/3/2023</td>
<td>8:00 AM - 5:00 PM</td>
</tr>
<tr>
<td>1/4/2023</td>
<td>8:00 AM - 5:00 PM</td>
</tr>
<tr>
<td>1/5/2023</td>
<td>8:00 AM - 5:00 PM</td>
</tr>
</tbody>
</table>

**T** = Irregular Schedule Details

- I, A, N, P, D, E, F, R, M, 1, 2
- I, A, N, P, D, E, F, R, M, 1, 2
- I, A, N, P, D, E, F, R, M, 1, 2
- I, A, N, P, D, E, F, R, M, 1, 2
- I, A, N, P, D, E, F, R, M, 1, 2

**Comments:**

- Employees working irregular work week must indicate shift/s work schedule below
- Employees working irregular work week must indicate shift/s work schedule below
- Employees working irregular work week must indicate shift/s work schedule below
- Employees working irregular work week must indicate shift/s work schedule below
- Employees working irregular work week must indicate shift/s work schedule below
Completing the CMS 634 Employee Attendance Form for Department Members as a Timekeeper

**Step 1:**
Navigate to CMS 634 - Distributed. Click the form name to open it.

**Step 2:**
As a Timekeeper you can fill out the CMS 634 Timesheet in eForms for those in your department group (if this is your current process).

In your role as timekeeper, if you wish to fill out the form for another person in your department, replace your Empl ID with the Empl ID of the person for whom you are filling out the form. The system will then automatically populate the form with that person’s information.

You can continue filling out the rest of the form as usual, click to print.

Click to save the form to eForms. Note: This will automatically close the form window. If you click without saving, the form with its data will be lost.

⚠️ You are only able to auto populate forms by filling in the lookup field for employees in the departments that you have security access to in CMS.
Completing a Student Timesheet Form

**Step 1:**
Navigate to the Student Timesheets folder and click the folder to open it.

**Step 2:**
The folder opens in a new browser window with a list of student timesheet eForms. Click
Step 3:
The form opens in a new browser window.

After a few seconds, the form will automatically populate with your information. If the current procedure in your area is to fill out your own timesheet, continue.

Choose the month by clicking the dropdown box.

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December
### Step 4:

Once you choose the month the year will automatically fill in next to it.

The pay calendar month also automatically populates with the right days for the pay period.

Fill in the rest of the required cells.

Enter the time as Hours: Minutes.

Use the Tab Key to move from one cell to the next.

If the information that is automatically populated is incorrect, please contact Human Resources Services, Payroll so that it can be corrected. Please note that Payroll has chosen to make the automatically populated information static on this form.
**Note:** Sections appearing in green indicate lookup fields. Enter the appropriate information in the green box and the form will automatically populate.

The sections appearing with red box(es) are required fields.

⚠️ Forms cannot be saved or printed without information in the required fields. For the Student Timesheets, all the required fields are automatically populated. In fact, all of the data fields are automatically populated except for Task Profile Value and the actual Hours : Minutes worked.
Step 5:

Once you are done filling out the form, click to print the form. The form will open in Adobe Acrobat reader and you can click to print.

You can also save a static version of the data filled form as a PDF on your desktop by clicking in the Adobe Acrobat reader window.

Note: Since this is no longer a 12 month form, the Timekeeper or Student will have to create a new one for each month they are being paid.

After printing the form, click to save it in eForms. Note: This will automatically close the form window.

Note: If you have not saved the eForm first and click the button, the window will automatically close and the form with its data will be lost.

For how to retrieve your student timesheet, see section “Retrieving eForms Using Search Templates”.
Completing a Student Timesheet Form as a Timekeeper

**Step 1:**
Navigate to the Student Timesheets folder and click the folder to open it.

**Step 2:**
The folder opens in a new browser window with a list of student timesheet eForms. Click
**Step 3:**

As a **Timekeeper** you can fill out the Student Timesheets in eForms for those students in your department group (if this is your current process).

In your role as timekeeper, if you wish to fill out the form for a student in your department, replace your Empl ID with the Empl ID of the student for whom you are filling out the form. The system will then automatically populate the form with that student’s information.

Choose the month by clicking the dropdown box.
**Step 4:**

Once you choose the month the year will automatically fill in next to it.

The pay calendar month also automatically populates with the right days for the pay period.

Fill in the rest of the required cells.

Enter the time as Hours: Minutes.

Use the Tab Key to move from one cell to the next.

⚠️ If the information that is automatically populated is incorrect, please contact Human Resources Services.

Once you are done filling out the form, click 📄PDF to print the form. The form will open in Adobe Acrobat reader and you can click 📄 to print.

After printing the form in eForms, click 📄Save to save it in eForms. **Note:** This will automatically close the form window.

**Note:** If you have not saved the eForm first and click the 📄 button, the window will automatically close and the form with its data will be lost.

⚠️ You are only able to auto populate forms by filling in the lookup field for student employees in the departments that you have security access to in CMS.
Completing a CD048 Student Asst Attendance – Distributed Form as a Timekeeper

*****This is a manual version of the CMS form and is only to be used if you miss the RTE deadline.*****

**Step 1:**
Navigate to the Department Summary Forms folder and click the folder to open it.

**Step 2:**
The folder opens in a new browser window with a list of Department Summary Payroll eForms. Click

![CD048 Student Asst Attendance - Distributed Form](image-url)
Step 3:
The form opens in a new browser window.

Fill in the sections appearing with red box(es).

These are required fields:

- Unit
- Month
- Year
- Department ID
Step 4:

Start filling in the Student Empl ID’s in your Department in the column under EMPLOYEE IDENTIFICATION.

Every time you type in an Empl ID and tab out of the cell, the student’s RCD, INIT, SURNAME, SSN, CLASS, and SERIAL fields will automatically populate.

Do this for each student employee, filling out the rest of the columns as needed.

Once you are done filling out the form, click to print the form.

After printing the form in eForms, click to save it in eForms. Note: This will automatically close the form window.

Note: If you have not saved the eForm first and click the button, the window will automatically close and the form with its data will be lost.

You are only able to auto populate forms by filling in the lookup field for student employees in the departments that you have security access to in CMS.

For how to retrieve your CD048 Student Asst Attendance – Distributed by Month and Year, see section “Retrieving eForms Using Search Templates”.

## Completing a OT & SD Request Combo-New Form as a Timekeeper

**Step 1:**
Navigate to the Department Summary Forms folder and click the folder to open it.

**Step 2:**
The folder opens in a new browser window with a list of Department Summary Payroll eForms.

Click eForms
Step 3:

The form opens in a new browser window.

Fill in the sections appearing with red box(es).

These are required fields:

- Department ID
- Unit
- Month
- Year
**Step 4:**

Start filling in the Empl ID’s in your Department in the column under EMPLOYEE IDENTIFICATION.

Every time you type in an Empl ID and tab out of the cell, the employee’s Empl REC#, SSN, INITIALS, LAST NAME, CLASS, and SERIAL fields will automatically populate.

Do this for each employee, filling out the rest of the columns as needed.

Once you are done filling out the form, click to print the form and in the Adobe Acrobat reader window.

After printing the form in eForms, click to save it in eForms. *Note: This will automatically close the form window*

*Note: If you have not saved the eForm first and click the button, the window will automatically close and the form with its data will be lost.*

⚠️ You are only able to auto populate forms by filling in the lookup field for employees in the departments that you have security access to in CMS.

⚠️ For how to retrieve your OT & SD Request Combo-New – Distributed by Month and Year, see section “Retrieving eForms Using Search Templates”.
Retrieving eForms Using Search Templates:

*Individual Staff Payroll eForm Search*

**Step 1:**
Navigate back to the main eForms - Human Resources section.

On the right under **Retrieve Saved Human Resources Forms** open the Payroll eForm Search folder.

**Step 2:**
The folder opens in a new browser window with a list of Search Templates for retrieving Payroll eForms.

There are 3 Search Templates for Payroll Forms.

Click on the Individual Staff Payroll eForm Search search template.

**Step 3:**
The search template opens in a new browser window.

This is the search template that you would use to retrieve the following saved eForms:

- Appointment/Change Request
- CMS 634 Employee Attendance
- Dock Notice
- Faculty Consultant Pay Request
- Hourly Intermittent
- Separation Notice
- SSA – 1945
- STD 682 Overtime

The fields listed in the Search Template are the index fields. Use these fields to help identify the document that you wish to retrieve.
Step 4:
To retrieve a CMS 634 – Distributed eForm, put in the employee Empl ID.

This will retrieve all the staff payroll eForms that you have created for this Empl ID.

To further narrow it down, choose the CMS 634 Employee Attendance DocType from the dropdown box.

This will retrieve all the CMS 634 - Distributed eForms that you have created for this Empl ID.

Step 5:
Once you have filled in your search criteria, click Search.

A list of eForms matching your criteria that you either created or have assigned security will appear.

Click on the eForm that you wish to open and the eForm will open up.

⚠️ You are only able to retrieve eForms that you have either created or those where the security on the form data has been assigned to you.
Another Example:

As a Timekeeper, you might want to retrieve all of the CMS 634 – Distributed timesheets that you created for the month of June, 2009 for one department.

To do this fill in the following fields on the search template:

- Department_ID
- Month
- Year

Once you have filled in your search criteria, click

**Search**

**Note:** If you only do timekeeping for one department there is no need to enter Department_ID as a part of the retrieval criteria.
**CD048 Student Asst Attendance**

**Step 1:**

**Department Summary eForm Search**

Use this Search Template to look up the following Departmental Summary eForms:

- CD048 Student Assistant Attendance
- Delegation of Authority
- Department Reorganization Request
- Miscellaneous Payroll Request
- OT & SD Request
- Position Action Form
- Student Employee Task Profile

**Step 2:**

Click on the search template.

To retrieve a Department Summary eForm, put in either a Unit or Department ID.

This will retrieve all the Department Summary eForms that you have created for this Department or Unit.

To further narrow it down, choose the **CD048 Student Assistant Attendance** DocType from the dropdown box.

This will retrieve all the CD048 Student Assistant Attendance eForms that you have created for this Department or Unit.
Step 3:

Once you have filled in your search criteria, click **Search**.

A list of eForms matching your criteria that you either created or have assigned security will appear.

Click on the eForm that you wish to open and the eForm will open up.

⚠ You are only able to retrieve eForms that you have either created or those where the security on the form data has been assigned to you.
**Student Timesheets eForm Search**

**Step 1:**
Use this Search Template to look up the following Student Timesheets eForms:

- 1150 Instructional Student Assistant
- 1151 Instructional Workstudy Student
- 1868 Student Assistant NRA
- 1870 Student Assistant Timesheet
- 1871 Workstudy Timesheet On-Campus
- 1872 Workstudy Timesheet Off-Campus
- 1874 Alternate Student Assistant
- 1875 Alternate Workstudy On-Campus
- 1876 Alternate Workstudy Off-Campus

**Step 2:**
Click on the search template.

To retrieve a Student Timesheets eForm, put in an Empl_ID.

This will retrieve all the Student Timesheets that you have created for this Empl_ID.

To further narrow it down, choose the **1874 Alternate Student Assistant** DocType from the dropdown box.

This will retrieve all the 1874 Alternate Student Assistant eForms that you have created for this Empl_ID.
Step 3:

Once you have filled in your search criteria, click **Search**.

A list of eForms matching your criteria that you either created or have assigned security will appear.

Click on the eForm that you wish to open and the eForm will open up.

⚠️ You are only able to retrieve eForms that you have either created or those where the security on the form data has been assigned to you.
## Changing the Size of a Form (Zoom)

Zooming allows you to enlarge or shrink the size of the form in your browser’s window.

⚠️ The Zoom feature is only available in Internet Explorer 7 and up.

<table>
<thead>
<tr>
<th><strong>Step 1:</strong></th>
<th>![Zoom Feature Image]</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you open a form, at the bottom right of the browser you will see the Zoom feature. Click on the Zoom feature.</td>
<td>![Zoom Feature Image]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Step 2:</strong></th>
<th>![Zoom Feature Image]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select what percentage you wish to zoom in on the page. 100% shows you the actual size.</td>
<td>![Zoom Feature Image]</td>
</tr>
</tbody>
</table>
Step 3:
The form is now enlarged.
## Saving a Form

There are two ways to save forms: **Save as a PDF** and **Save to the System**. Some forms will only allow you to Save as a PDF; for those forms you will need to fill out the form again for any changes. Forms that are Saved to the System can be opened and modified (see instructions on page 14).

<table>
<thead>
<tr>
<th>Save to the System</th>
<th></th>
<th>Save as PDF</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong></td>
<td>When you are ready to save your form, click <strong>Save</strong> at the top left of the form.</td>
<td>Select <strong>PDF</strong> at the top left of the form.</td>
</tr>
<tr>
<td></td>
<td>You may be required to fill out certain fields on the form before you are able to save.</td>
<td>This will automatically open the form in Adobe Acrobat in a new window.</td>
</tr>
<tr>
<td><strong>Step 2:</strong></td>
<td>A confirmation page appears indicating that your form has been saved. Click <strong>OK</strong>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Confirmation</strong></td>
<td><strong>PDF Close</strong></td>
</tr>
<tr>
<td></td>
<td>The form data has been processed successfully.</td>
<td>Page 1 Page 2 Page 3 Page 4</td>
</tr>
<tr>
<td></td>
<td>Summary: Object Store: TEST_CE2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>OK</td>
<td>Title 5 of the (This docu</td>
</tr>
</tbody>
</table>
### Step 2:

Select the **icon** to specify where you would like to save the PDF.

⚠️ If you would like to save an existing form as a new form, see the **Save As** section on page 26.
Printing a Form

**Step 1:**
To print a copy of your form, click on at the top left of the form.
This will automatically open a copy of the form in Adobe Acrobat format in a new window.

**Step 2:**
In Adobe Acrobat, click on the Print icon to print a copy of the form.
Closing a Form

**Step 1:**

To close the form, click on [Close] at the top left of the form.

⚠️ If you have not saved your changes you will lose all of your changes to the form. It is recommended that you save the form before closing. Click [Save] to save before closing the form. You can re-open a saved form (see instructions on page 14).
Checking In an eForm

A form can become locked if you close a form by clicking on the “X” on the window rather than using the Close or Save buttons. This means that HR or Finance personnel will be unable to view your form in order to process it. Follow the instructions below to unlock the form.

**Step 1:**
There are two ways to determine if your form has been locked due to being “checked out.”

The first is that a user will see a red check mark next to one of their saved forms.

The second is that a user with security to see another user's eForm will receive an error when they try to open that user's checked out eForm (i.e., the HR Benefits Department attempts to open an employee's Benefits eForm.)

**Step 2:**
To unlock a form, navigate to the appropriate section on the left under My Workplace.

For example, Benefits Forms are under **eForms - Human Resources**.

For each section of forms, there is a corresponding Search section to the right.

For example, Benefits eForm Search allows you to search for Benefits Forms that you have submitted.
<table>
<thead>
<tr>
<th>Step 3:</th>
<th><img src="image.png" alt="Image" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the search link that corresponds to the type of form you are searching for.</td>
<td><img src="image.png" alt="Image" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 4:</th>
<th><img src="image.png" alt="Image" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the search form that corresponds to the type of form that you are searching for.</td>
<td><img src="image.png" alt="Image" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 5:</th>
<th><img src="image.png" alt="Image" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave the search criteria blank to search for all forms you have submitted in this category.</td>
<td><img src="image.png" alt="Image" /></td>
</tr>
<tr>
<td>Otherwise, enter search criteria to narrow the search results.</td>
<td><img src="image.png" alt="Image" /></td>
</tr>
<tr>
<td>Once the appropriate search criteria are entered, click <strong>Search</strong>.</td>
<td><img src="image.png" alt="Image" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 6:</th>
<th><img src="image.png" alt="Image" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>A list of your forms will appear. Note that a form that is locked will have a red check mark next to it.</td>
<td><img src="image.png" alt="Image" /></td>
</tr>
<tr>
<td>Click on the form to select it.</td>
<td><img src="image.png" alt="Image" /></td>
</tr>
</tbody>
</table>
**Step 7:**

The form will open in a new window.

Click on either ![Close](image) or ![Save](image).

The form is now unlocked.

⚠️ You will see the red check mark is still present next to the form. This is because the search results have not been updated. Click ![Search](image) again to update the search results. The red check mark should disappear.