The eForms User Guide will cover accessing Benefits forms via TitanOnline.
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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 Benefits eForms

<table>
<thead>
<tr>
<th><strong>Step 1:</strong></th>
<th><strong>Step 2:</strong></th>
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<tbody>
<tr>
<td>Open your browser and log into the campus portal at <a href="http://www.fullerton.edu">www.fullerton.edu</a>.</td>
<td>Select the Titan Online tab.</td>
</tr>
</tbody>
</table>
**Step 3:**
Select the **My Workplace** link. It is located in the bottom left corner of the screen in the “eContent”.

The eForm Benefits Training Guide, eForm General Training Guide, eForm Payroll Training Guide and eForms - FAQ are located under Training Resources.

**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 **Benefits** folder.

**Step 6:**
The folder will open in a new browser window.

You will see 1 folder with the following eForms in it:
The rest of the Benefits eForms are in the list enclosed in the [ ].
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 Benefits Enrollment Worksheet

**Step 1:**

Navigate to

Benefits Enrollment Worksheet

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, SSN, Address, Phone Numbers, Date of Birth, Dept ID, Dept Name, etc.).

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

Complete the rest of the form as required.

⚠️ To fill in dependent information, put the first initial of first name and tab out.
If the dependent is already on file in CMS, the dependent information on file should fill in.

**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 Benefits Enrollment worksheet, all the required fields are automatically populated (First Name, Last Name, SSN, Department ID on page 1 and Empl ID on page 2).
Step 3:

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.

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.

For how to retrieve your Benefits Enrollment Worksheet, see section “Retrieving eForms Using Search Templates”.
Completing the HCRA & DCRA Enrollment form

Step 1:
Navigate to HCRA & DCRA Enrollment
Click the form name to open it.

Step 2:
The folder opens in a new browser window. After a few seconds, the form will automatically populate with your information (SSN, Marital Status, and 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 Benefits Enrollment worksheet, all the required fields are automatically populated (SSN, First Name, Last Name, and Monthly Deduction Amount).
Step 3:

Once you are done filling out the form, click PDF/Print 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.

After printing the form in eForms, click Save & Close 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 Benefits Enrollment Worksheet, see section “Retrieving eForms Using Search Templates”.
Retrieving eForms Using Search Templates:

*Benefits eForm Search – Benefits Enrollment Worksheet*

**Step 1:**

Navigate back to the main eForms - Human Resources section.

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

**Step 2:**

The folder opens in a new browser window with a list of Search Templates for retrieving Benefits eForms.

There are 2 Search Templates for Benefits Forms:

- **Benefits eForm Search**
- **Fee Waivers eForm Search**

Click on the **Benefits 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:

- Affidavit of Eligibility for Economically Dependent children
- Benefits Enrollment Worksheet
- Catastrophic Leave Donation
- Catastrophic Leave Request
- Domestic Partner Dependent Certification
- HCRA & DCRA Claim
- HCRA & DCRA Enrollment
- Pre-Tax Parking Deduction
- Request for Formal Leave of Absence

⚠️ 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 the Benefits Enrollment Worksheet you just saved, put in the either your SSN (with hyphens) or Empl ID (no hyphens).

To further narrow it down, choose the Benefits Enrollment Worksheet DocType from the dropdown box.

⚠️ You do not need to fill in all of the fields on the Search Template. In fact, you can leave the fields blank and click --only the Benefits eForms that you have created or been given security to will be retrieved.

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

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 in another window.

⚠️ 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.
**Benefits eForm Search – HCRA & DCRA Enrollment**

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

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

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

There are 2 Search Templates for Benefits Forms:

- [Benefits eForm Search](#)
- [Fee Waivers eForm Search](#)

Click on the **Benefits eForm Search** search template.

**Note:** You use the same Search Template as the **Benefits Enrollment Worksheet.**
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:

- Affidavit of Eligibility for Economically Dependent children
- Benefits Enrollment Worksheet
- Catastrophic Leave Donation
- Catastrophic Leave Request
- Domestic Partner Dependent Certification
- HCRA & DCRA Claim
- HCRA & DCRA Enrollment
- Pre-Tax Parking Deduction
- Request for Formal Leave of Absence

⚠️ 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 the HCRA & DCRA Enrollment form you just saved, put in the either your SSN or Empl ID.

To further narrow it down, choose the HCRA & DCRA Enrollment DocType from the dropdown box.

⚠️ You do not need to fill in all of the fields on the Search Template. In fact, you can leave the fields blank and click --only the Benefits eForms that you have created or been given security to will be retrieved.
Step 5:

Since there is only an SSN and not an EMPL ID on this form, enter the SSN with hyphens.

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 in another window.

⚠️ 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.

**Step 1:**
When you open a form, at the bottom right of the browser you will see the Zoom feature.

Click on the Zoom feature.

**Step 2:**
Select what percentage you wish to zoom in on the page. 100% shows you the actual size.
Step 3:
The form is now enlarged.
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 & Close` to save before closing the form.

⚠️ You can re-open a saved form (see Retrieving eForms Using Search Templates).
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.
### Step 3:
Select the search link that corresponds to the type of form you are searching for.

### Step 4:
Select the Search Template that corresponds to the type of form that you are searching for.

### Step 5:
Leave the search criteria blank to search for all forms you have submitted in this category.

Otherwise, enter search criteria to narrow the search results.

Once the appropriate search criteria are entered, click **Search**

### Step 6:
A list of your forms will appear. Note that a form that is locked will have a red check mark next to it.

Click on the form to select it.
Step 7:
The form will open in a new window.

Click on either Close or Save & Close.

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 again to update the search results. The red check mark should disappear.