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<th>Budget</th>
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<th>Transfer Approval</th>
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<td>☐ Accounts Payable</td>
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<td>☐ Purchasing</td>
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<td>☐ Billing and Receivables</td>
<td>☐ Other</td>
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<td>☐ Budget</td>
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I certify that I have read, understood and agree to follow the Access and Compliance form which I signed when I was hired.

Employee Signature __________________________ Date __________________
Employee Supervisor / Department __________________________ Date __________________
Chair Signature __________________________ Date __________________
Division Finance Manager's Signature __________________________ Date __________________
*Role 3 only __________________________ Date __________________
Dean / AVP / Division Head / Designee __________________________ Date __________________
Signature __________________________ Date __________________


Custodian of Record Signature __________________________ Date __________________
Information Security Officer Signature __________________________ Date __________________

<table>
<thead>
<tr>
<th>For CMS Use Only</th>
</tr>
</thead>
</table>
| CMS Finance Business Analyst Approval (for core/central requests) __________________________ Date __________________

☐ Distribution List
☐ LearnerWeb
☐ Register Email
☐ Master File
☐ CMS Finance tab
# Employee Information

<table>
<thead>
<tr>
<th>First Name:</th>
<th>Last Name:</th>
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<table>
<thead>
<tr>
<th>Campus Wide ID:</th>
<th>Campus E-mail:</th>
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<tbody>
<tr>
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</table>

<table>
<thead>
<tr>
<th>Department Name:</th>
<th>Division:</th>
<th>Campus Extension:</th>
</tr>
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<tbody>
<tr>
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</table>

- [ ] Permanent  
- [ ] Temporary  
- [ ] If Temporary, List Appointment End Date:

<table>
<thead>
<tr>
<th>Account Action Request (check all that apply):</th>
<th>New</th>
<th>Modify</th>
<th>Disable</th>
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<thead>
<tr>
<th>Reason for access:</th>
<th>Primary Dept User</th>
<th>Backup Dept User</th>
<th>Other (state reason)</th>
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</table>

Please select the necessary role(s) below. **Note**: the corresponding CMS distributed roles will be selected automatically.

- [ ] Dept User (role 1)  
- [ ] Dept User (role 2)  
- [ ] Custom Role (role 3) *Requires Division HR Coordinator approval

- [ ] Dept Responsible Person (Chair/Director) (role 4)
- [ ] College/Unit HR Manager (role 5)
- [ ] College/Unit Head (Dean, AVP, Assoc/Asst Dean) (role 6)
- [ ] Division HR Manager (role 7)

## Human Resources Distributed Roles

- [ ] Student Appointments Processing
- [ ] Receives Confirmation Tickets via Email
- [ ] List DeptID(s):

- [ ] Student Time Reporting  
- [ ] List all DeptID(s) for which user will report student time

- [ ] Student Job Roster
- [ ] PTF Appointments/Contract Processing
- [ ] PTF Approval
- [ ] Faculty Roster

- [ ] Entire Division Access Click here for list  
- [ ] List Division to which user is requesting access

- [ ] Entire College Access Click here for list  
- [ ] List College to which user is requesting access

- [ ] Department Access Click here for list  
- [ ] List all DeptID(s) or nodes to which user is requesting access

- [ ] Staff/MPP Roster  
- [ ] LAPP/Staff/Faculty/Student Roster for MPP

- [ ] CWID Search
- [ ] Query (run only)

- [ ] Employee Funding and Dept Position Rosters

- [ ] LCD Reports (Labor Expense, Salary Expenditures & Projections and Salary Expenditures History Page)

- [ ] Funding Department Roster

- [ ] Staff/MPP/Faculty Time Reporting  
- [ ] List all DeptID(s) for which user will report staff/MPP/faculty time
<table>
<thead>
<tr>
<th>Human Resources Core/Central Roles</th>
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</thead>
<tbody>
<tr>
<td>□ Benefits</td>
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<tr>
<td>□ CMS HR Production Support</td>
</tr>
<tr>
<td>□ Faculty Affairs and Records</td>
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<tr>
<td>□ Human Resources</td>
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<tr>
<td>□ Payroll</td>
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<tr>
<td>□ Other:</td>
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<td>□ Other:</td>
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</table>

I certify that I have read, understood and agree to follow the Access and Compliance form which I signed when I was hired.

<table>
<thead>
<tr>
<th>Employee Signature</th>
<th>Date</th>
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</table>

Approvals (to be obtained by the employee)

<table>
<thead>
<tr>
<th>Immediate Supervisor or Department Chair</th>
<th>Signature</th>
<th>Date</th>
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<tbody>
<tr>
<td>Division HR Coordinator *Role 3 only</td>
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<tr>
<td>Dean or AVP or Division Head or Designee</td>
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<thead>
<tr>
<th>Custodian of Records Signature (for PTF)</th>
<th>Date</th>
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<tbody>
<tr>
<td>Custodian of Records Signature (all)</td>
<td>Date</td>
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<tr>
<td>ISO Signature</td>
<td>Date</td>
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</table>

For CMS Use Only

<table>
<thead>
<tr>
<th>CMS HR Business Analyst Approval (for core/central requests)</th>
<th>Date</th>
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</table>

□ Distribution List
□ LearnerWeb
□ Register Email
□ Master File
**Student Employee**
**Task Profile Action Form**

Complete this form to request CMS Task Profiles (used to assign funding information during the reporting of student employee time). Send completed forms to the CMS HR office via email: cmshr@fullerton.edu or inter campus mail. Email forms will be accepted only from authorized individuals. For more information on this form, visit the CMS HR website at: http://www.fullerton.edu/cms/HumanResources/index.html.

**CMS Dept ID**

**Effective Date**

**Add**

<table>
<thead>
<tr>
<th>Task Profile (CMS HR use only)</th>
<th>Unique Identifier</th>
<th>Fund Code</th>
<th>Class Code</th>
<th>Project Code</th>
<th>Short Description (up to 15 characters)</th>
<th>Comments</th>
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<tbody>
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**Modify**

<table>
<thead>
<tr>
<th>Task Profile</th>
<th>Unique Identifier</th>
<th>Fund</th>
<th>Class</th>
<th>Project</th>
<th>Short Description (up to 15 characters)</th>
<th>Comments</th>
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**Inactivate**

Enter Task Profile Value(s) to Inactivate

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**Requester**

**Signature**

**Print**

**Date**

**Dean/AVP or Division Head/Designee**

**Signature**

**Print**

**Date**

**Divisional Finance Manager**

**Signature**

**Print**

**Date**

**For CMS HR Use ONLY**

Date Completed: ______________ Entered by: __________________

Generic CMS Position #: __________________
New Chartfield Request Form

1. Select one:
   - Add
   - Modify
   - Inactivate
   - Reactivate

2. Select one Chartfield:
   - Account
   - Fund
   - DeptID
   - Program
   - Class
   - Project

3. Have you verified that the Chartfield value does not exist?
   - Yes
   - No

4. Indicate value to modify, inactivate, or reactivate:
   - Account (6)
   - Fund (5)
   - Department (5)
   - Program (4)
   - Class (5)
   - Project (8)

5. Payroll costs apply?
   - Yes
   - No

   If yes, select the types of employees that will be paid:
   - Students
   - Part-Time Faculty
   - Staff/Mgmt
   (Requires a Position Action Form)

6. Effective Date (mm/dd/yyyy):
   Use the first day of the current fiscal year

7. Short Description (10 characters):

8. Long Description (30 characters):

9. Purpose:

10. Project ONLY: Start Date (mm/dd/yyyy):
    End Date (mm/dd/yyyy): (reversion date) or Open Ended

11. Will there be any revenue to this new Chartfield?
   - Yes
   - No

12. If yes to question above please provide explanation:

Form Approval:
13. Requested by:
    Signature: 
    Print Name: 
    Date: 
    Extension: 

14. Department Head:
    Signature: 
    Print Name: 
    Date: 
    Extension: 

15. Division:
    Signature: 
    Print Name: 
    Date: 
    Extension: 

Central Office Use Only:
Accounting Services:
    Signature: 
    Print Name: 
    Date: 
    Extension: 

Budget Operations:
    Signature: 
    Print Name: 
    Date: 
    Extension: 

New Chart-field Code: 
New Pool ID (If Applicable): 
Rev. 09/07
<table>
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<tr>
<th>Position # Assigned:</th>
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</table>

**FOR CMS HR USE ONLY:**

Date action was reviewed by Divisional HR Coordinator and Forwarded to CMS HR:

- Date
- Signature
- Name
- Divisional Finance Manager

**Approval**

For your department:

- Department budget shift as applicable
- Contact your department's school or unit

**FOR BUDGET USE ONLY**

<table>
<thead>
<tr>
<th>Code</th>
<th>Class</th>
<th>Department</th>
<th>Fund</th>
<th>% of Distribution</th>
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Funding Requested:

- UPD
- NEW
- ADD a position

Effective Date of Action:

- Incumbent's Name
- Position Name
- Divisional HR Coordinator

Notes:

- For multiple positions, use the CMS Multi-job Position Request Form.
- Visit the CMS HR Website at https://www.fulcrum.edu/humanresources/searchform.html for more information on this form.

CMS Position Action Form
California State University, Fullerton

Fullerton
Cal State