Electronic Forms

Graduate Advisor User Guide
QUICK START GUIDE TO PROCESSING FORMS

Logging In

- Log in to OnBase (https://aisimgprdweb.sdsu.edu/AppNet/Login.aspx) using your SDSU ID and password. You will be required to use Duo MFA to log in.

Navigating to Workflow

- Log in using your SDSU ID and password, and Duo MFA
- Click on the menu icon in the top left corner (three horizontal lines)
- Click on Open Workflow
- Click on the arrow next to GRD-AP01 Graduate Form Approvals
- Click on AP01 Program to open your queue

Processing Forms

- Click on a form to select it
- Compete the required fields in the program section
- Click Save – You can sign out and return to the form later to make changes, or proceed, if ready.
- Click on Send to Grad Studies at the bottom of the Inbox to forward to Graduate Studies

Making Corrections

- Click on the form to select it
- Review the note from Graduate Studies by clicking on Notes at the bottom on the screen
- Click Save – this does not move the form out of your queue!
- Click on Correction Complete to return to Graduate Studies

Cancelling Forms

- To cancel a form and have notification sent to student, click on a form to select it.
- Click on Cancel Form
- Select reason and click Submit
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1. Introduction

Graduate Studies uses an electronic form and workflow process using OnBase for many of the graduate student forms previously processed on paper.

As a Graduate Advisor, assigned program-level approver, or Department Chair, you can do the following using Hyland OnBase:

- View pending and completed Graduate Studies forms for students in your program.
- Initiate and submit forms on behalf of students in your program (for select forms only).
- Approve/Deny/Cancel/Process forms for students in your program.

Support

If you have any questions or suggestions, please contact Graduate Studies at gra@sdsu.edu or 619-594-5213
2. Logging In

- To log in to your account, please navigate to https://aisimgprdweb.sdsu.edu/AppNet/Login.aspx and log in using your SDSU ID and password.

- Your identity will be verified with multi-factor authentication (MFA) using Duo. For information about Duo, visit https://it.sdsu.edu/security/operations-services/duo_getting_started

- To log out after your session, click on the blue arrow next to your name in the top right corner, and clicking on **Logout**.
3. Notifications

- You will be notified about electronic forms pending your approval minutes after a student submits a form.
- The notification email will contain the link to log into Hyland OnBase, where you will be able to view, approve, deny, process, or cancel forms for students in your program.
- Twice weekly reminder emails will be sent if any forms are pending your approval or processing.
- If a form is not processed within two weeks, the Department Chair is notified and added as an approver to help facilitate the timely processing of forms.
4. Navigating OnBase

- The page below is the default view when you log in. From this page, you can search for and view documents (see section 7 for more details).
- For form processing and to submit new forms, you will need to access the Menu panel.
5. Approving/Processing Forms

Accessing Program Workflow

- Open the Menu Panel and click on Open Workflow

  1. Document Retrieval

  2. Open Workflow

- Workflow will open in a new window
- Click on the small arrow next to GRD-AP01 Graduate Form Approvals, and then click on AP01 Program. This is your approval queue.

  ![Workflow Access Diagram]
Selecting Form

- Forms pending approval/processing will be shown in the Inbox

- Click on the form to open it
Processing Form

- Complete the Program section of the form. Depending on the type of form, you may be required to Approve, Deny, or complete additional fields. Your name and the date will auto populate when you complete the form.
- Click on Save to save your changes to the form. You can return to the form later or complete the next step to send the form to Graduate Studies. Required fields will turn red and you will be unable to save until they are completed.

Please note: Clicking Save will ONLY save your changes – it will not move the form out of your queue and send it to Graduate Studies.

Program Recommendations (Minimum required GPA for classification is 2.85)

Check One
- [ ] The above conditionally classified student has satisfactorily completed the conditions stated at the time of admission and is recom
- [ ] The above conditionally classified student has not satisfactorily completed the conditions stated at the time of Admission. I recom classified. The revised conditions and deadline for completion are:

1. Revised Conditions

2. Revised Deadline for Completion Term

3. Revised Deadline for Completion Year

If the revised deadline exceeds a year from admission to the university, please provide a justification:

4. The above student has not satisfactorily completed the conditions stated at the time of admission, and is recommended for dismiss

5. Please provide an explanation

6. Graduate Advisor Signature

7. Your Name

8. Date

9. 10/29/2018

Save
Complete Processing – Send to Graduate Studies

- Select the form(s) that you have completed (you can select more than one at a time by holding CTRL and clicking the forms you have completed).
- Click on **Send to Grad Studies**
Making Corrections

- In the event that Graduate Studies requests a correction on the form, the form will return to your Workflow Inbox with the Status **Correction Needed**.

- Select the form to open in the viewer, and check the note from Graduate Studies. The note can be accessed by clicking where it says **Note** at the bottom of the reading panel.

- Once you have made the correction, click **Submit to Save**, and click on **Correction Complete** to send back to Graduate Studies.
Cancelling Forms

- In the case that you need to cancel a form, select the form from the Inbox and click on Cancel Form. This will result in the student receiving a notification that the form has been cancelled, and will advise them to contact you for further guidance.

- Confirm that you wish to cancel the form, select a reason from the drop down box, and click Submit.
6. Submitting Forms for a Student

- To submit a form on a student’s behalf, open the menu panel and click on New Form

- Click on the form you wish to initiate. We currently have 15 forms available in the system, though not all can be initiated by the program. Please refer to the table below.

<table>
<thead>
<tr>
<th>Form</th>
<th>Who Can Initiate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advancement to Candidacy (U.Achieve Programs Only)</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Appeal for Time Limit Extension</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Change of Status</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Notification of Completion of Advanced Certificate Program</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Petition for Adjustment of Academic Requirements (PAAR)</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Petition to Repeat WU Graded Courses</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Permission to Enter an Advanced Certificate Program</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Validation for Recency</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Withdrawal or Dismissal</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Report of Foreign Language Completion</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Report of Final Exam or Thesis Defense</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Request to Change Degree Objective (Clinical Psychology)</td>
<td>Program Only</td>
</tr>
<tr>
<td>Request to Change Degree Objective (School Psychology)</td>
<td>Program Only</td>
</tr>
<tr>
<td>Request for Letter of Completion</td>
<td>Student Only</td>
</tr>
<tr>
<td>Request to Change Master's Program</td>
<td>Student Only</td>
</tr>
</tbody>
</table>
• Type in the student’s Red ID or SDSU ID, and click Tab or click your cursor into another box. The student’s information will populate.

  **Note:** *If you have entered the incorrect student, click the Clear Student Data button, and try again.*

• Complete the required fields for the student and the program sections, and click **Submit**.

  **Please note:** *If you submit a form on the student’s behalf, you will also be completing the program section and sending it directly to Graduate Studies.*
7. Viewing Forms

Document Retrieval

- You can search for forms using form type, date range, and/or keywords (e.g., Red ID, SDSU ID, program, department, etc.)

- Click on the form you wish to view, and it will be shown in the viewer.

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San Diego State University | Graduate Studies | grad.sdsu.edu | gra@sdsu.edu | 619-594-5213
Custom Queries

- You can also use the pre-configured Graduate Forms custom query to search for forms.
- Click on the Menu button and click on Custom Queries, and then click on Graduate Forms

- Use one or more of the pre-selected keyword searches and/or date range to find Graduate Studies forms.
- Click on the form you wish to view and it will be shown in the viewer.