

# HRDI Forms Guide

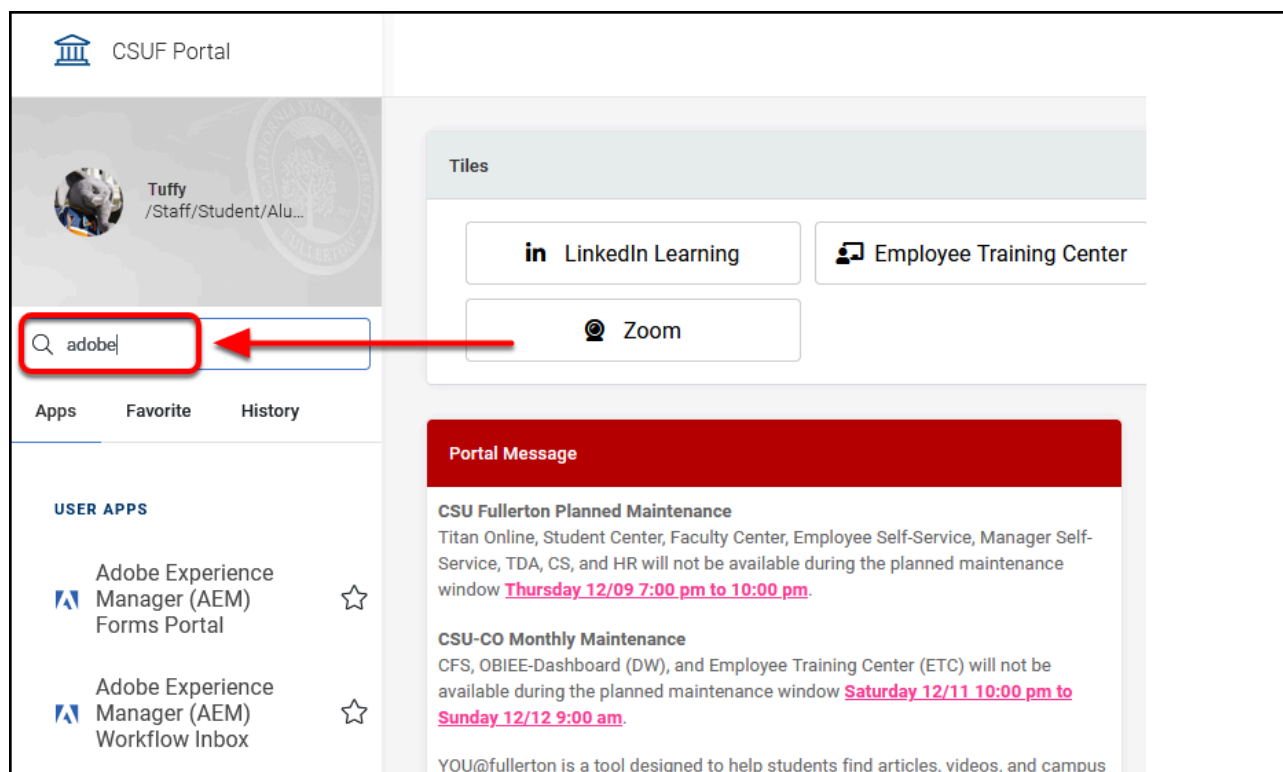
This guide is designed to guide you through logging in to the HRDI Forms portal as well as a navigation through the portal tabs and functionality.

## Logging In

### 1. Log on to the campus portal.

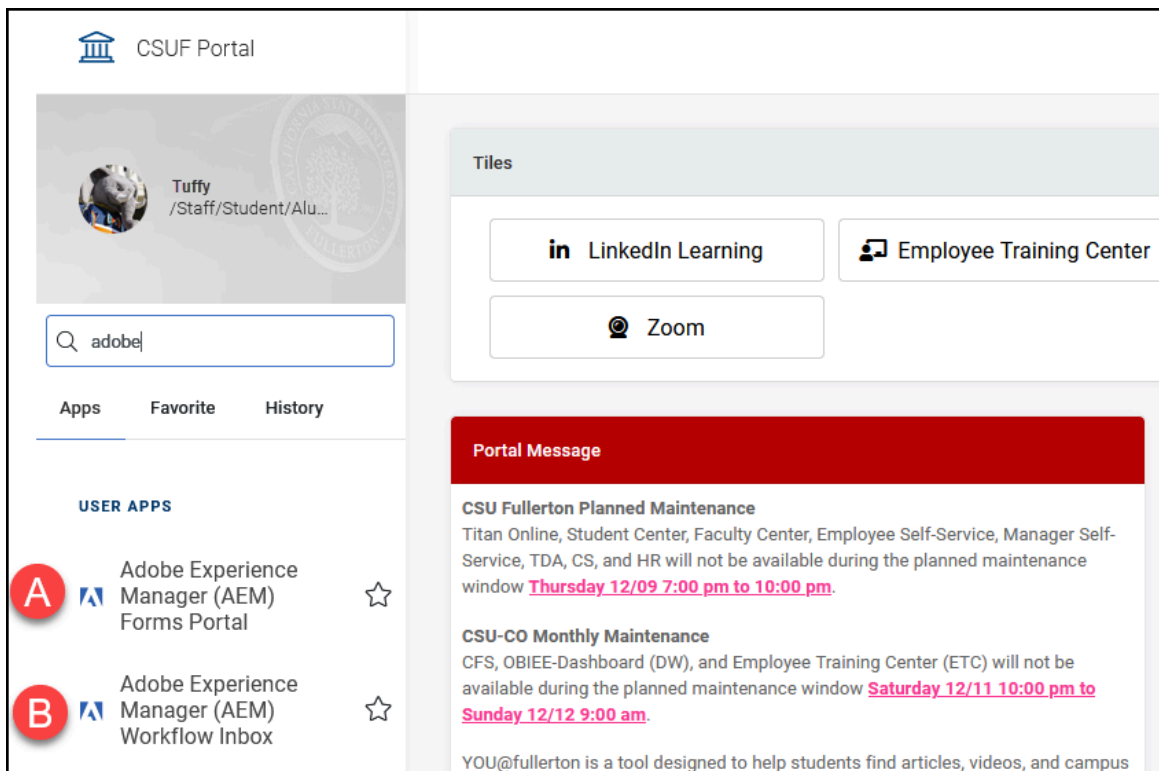
[View instructions on how to log on to the campus portal.](#)

### 2. Enter Adobe into the search bar on the left of your portal.



### 3. Click on Adobe Experience Manger (AEM) Workflow Inbox or

## Adobe Experience Manager (AEM) Forms Portal.



- A. **Adobe Experience Manager (AEM) Forms Portal** will take you to the list of available forms so you can create a new form.
- B. **Adobe Experience Manager (AEM) Workflow Inbox** will take you directly to the existing forms that are waiting for your review/approval.

## 4. Enter your campus username and password. Then click Sign In.

- A. Enter your campus username and password. This is the same information you use to log on to the campus portal.
- B. Then click **Sign In**.

## 5. You can now start a new form or select an existing form to review.

Inbox										Create	
Title	Priority	Description	Assignee	Project	Workflow	Status	Start Date	Due Date			
Employee Review	Medium	Employee Info: jhalpert 800123456	jhalpert		Staff Performance Evaluation Units 2, 5, 7 and 9	Active	a day ago				


CSUF Forms		
HOME	MY FORMS	MY DRAFTS MY TASKS HELP
Type here to search		
Form Name	Actions	
10_12_11_12_PayPlan (Compensation Services)		
Catastrophic Leave Donation (Payroll Services/Total Wellness)		
Catastrophic Leave Request (Total Wellness)		
Delegation of Authority Change (Payroll Services)		
Dock Notice (Payroll Services)		

# Navigation


## Tabs


To navigate through the form, click on the side tabs

The amount and names of tabs will differ from form to form (as shown in the examples below)



**Employee Transfer Data**

To know about Employee Transfer Data [Click here](#)

	<b>Section I</b>	To : Appointing Department		From : Releasing De
	Basic Information	<input type="text" value="California State University Fullerton"/>		<input type="text"/>
	Payroll Deduction	Appointing Address		Releasing Address
	Tax Withholding	<input type="text" value="800 N. State College Blvd. Fullerton, CA 92631"/>		<input type="text"/>
	Section II			
	Section III	Attention		Public
		<input type="text"/>	Telephone Number :	<input type="text"/>
		Personnel Services Specialist / Payroll Technician		Public
		<input type="text"/>	Telephone Number :	<input type="text"/>



# VSP COBRA



**Vision Care Information**

**Applicant Information**

**Dependant Information**

## ELECTION OF CONTINUED VISION COVERAGE THROUGH COBRA

Group Name

Date of

### ELECTING CONTINUATION OF VISION CARE COVERAGE:


Under COBRA, federal regulations specify that you and/or your dependent the date of continuation of coverage/COBRA notice, or the date of the loss days from the date of election to submit the first payment to VSP.

### DESCRIPTION OF QUALIFYING EVENT

☐ Disabled on the date of qualifying event
 ☐ Reduc

## Action buttons

There are 4 action buttons located at the bottom of each form



# VSP COBRA

**Vision Care Information**

**Applicant Information**

**Dependant Information**

## ELECTION OF CONTINUED VISION COVERAGE THROUGH COBRA

Group Name

Date of Qualifying Event

COBRA Coverage Begins

### ELECTING CONTINUATION OF VISION CARE COVERAGE:

Under COBRA, federal regulations specify that you and/or your dependent(s) have 60 days (the "Election Period") from the later of the date of continuation of coverage/COBRA notice, or the date of the loss of coverage to elect to continue participation, and 45 days from the date of election to submit the first payment to VSP.

### DESCRIPTION OF QUALIFYING EVENT

☐ Disabled on the date of qualifying event

☐ Reduction of hours

☐ Legal separation or divorce

☐ Retiree

☐ Dissolution of Registered Domestic Partnership

☐ Surviving Dependents / Widow

☐ Loss of child's dependent status

☐ Termination of employment

### ELIGIBILITY PERIOD

☐ 18-month coverage
 ☐ 29-month coverage
 ☐ 36-month coverage



Generate PDF

Reset

Save

Submit

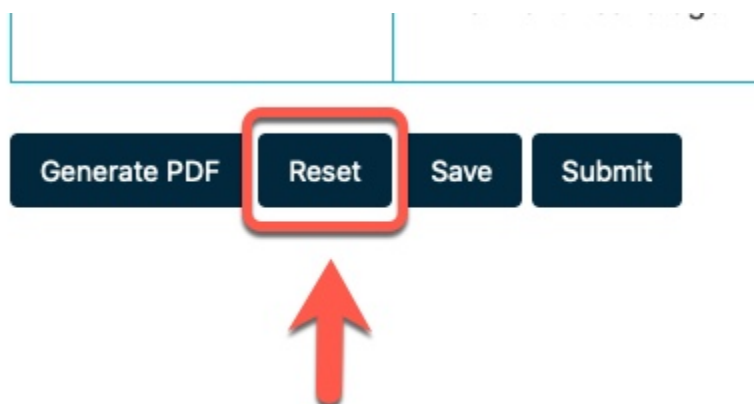
## **Generate PDF**

The Generate PDF button will open up a PDF copy of the form



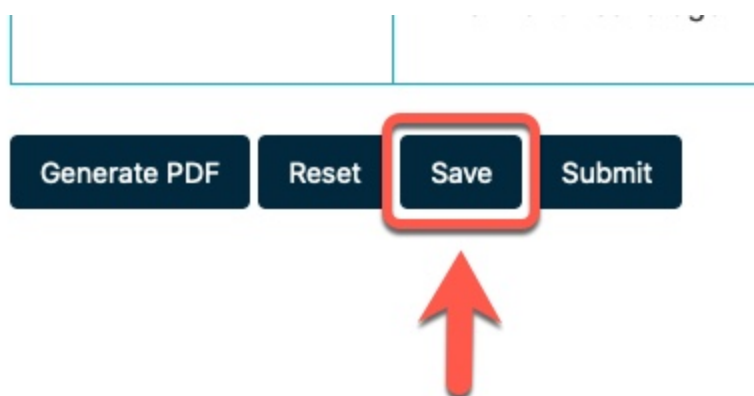
## **Reset**

The Reset button will clear the form of inputted content



## **Save**

The Save button will save the form



## **Submit**

The Submit button will allow you to submit the form for the next step in the workflow



## My Tasks Navigation

### Task Details Panel

By default the Task Details Panel will be collapsed

To open it, click the double arrow caret

Upon clicking the double arrows, the Task Details Panel will show

Supervisor Review

Form Workflow Details

Faculty and Staff Employee Fee Waiver Application

Employee Information

School-Related Information

Course Information

Request Reimbursement of Application Fee

Tax Implications

Authorizations

Immediate Supervisor Review And/Or Authorization

EMPLOYEE INFORMATION

\* Empl ID 800987654

\* First Name Wanda

\* Last Name Maximoff

\* Department IT

\* Email wmaximoff@FULLERTON.EDU

JOB-RELATED INFORMATION

\* Bargaining Unit R09

\* Job Code

\* Are you on Leave? ☐ Yes ☒ No

\* Probation Status

☐ Tenure ☒ Perm ☐ Probationary ☐ Other

Temp Status ☐ Temporary

End Date mm/dd/yyyy

☒ Full-time ☐ Part-time

Generate PDF

To close the Task Details Panel click the double arrow caret again

Supervisor Review

Form Workflow Details

Faculty and Staff Employee Fee Waiver Application

Employee Information

School-Related Information

Course Information

Request Reimbursement of Application Fee

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☐ Tenure ☒ Perm ☐ Probationary ☐ Other

Temp Status ☐ Temporary

End Date mm/dd/yyyy

☒ Full-time ☐ Part-time

Generate PDF

## Submit

### Step 1:

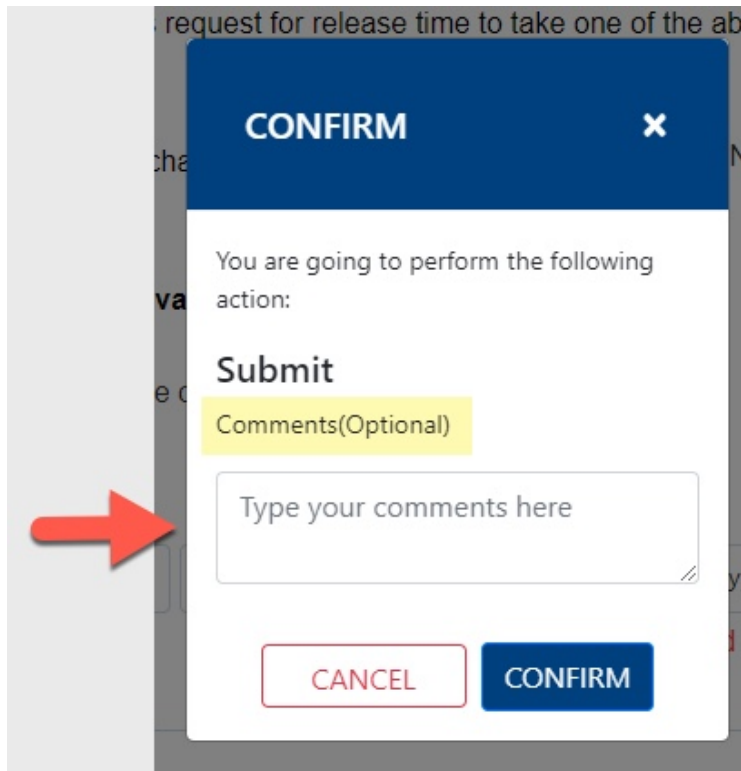
Click the **Submit** button





## Step 2: (Optional)

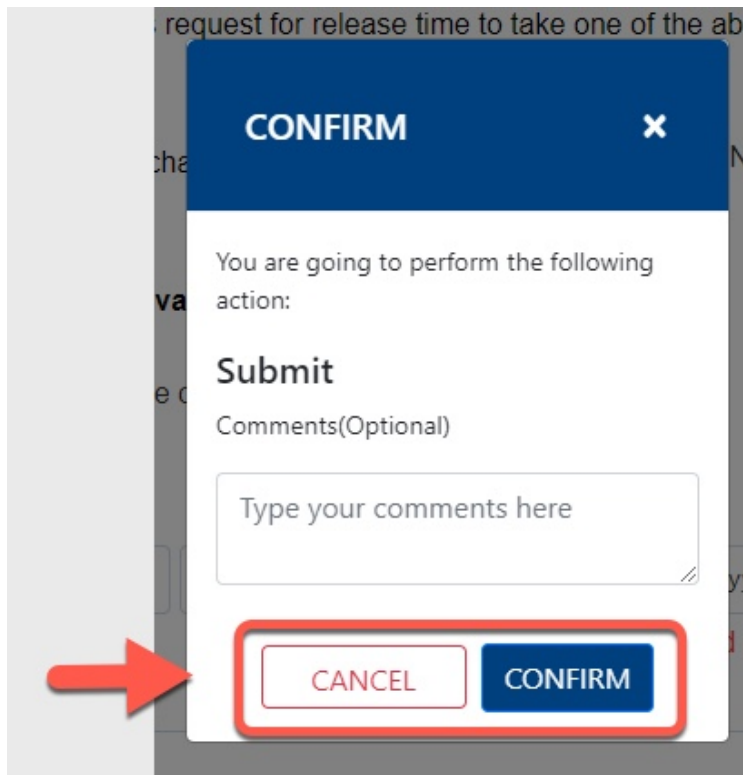
Leave comments in the **Comments(Optional)** field



## Step 3:

Click on the **Cancel** or **Confirm** button:

- Cancel to cancel submitting the document
- Confirm to proceed in submitting the document



request for release time to take one of the abo

cha

va

e c

yy

i

**CONFIRM** x

You are going to perform the following action:

**Submit**

Comments(Optional)

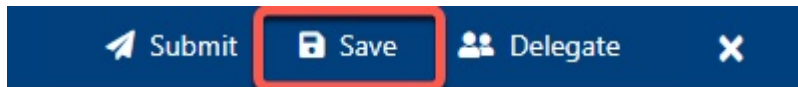
Type your comments here

CANCEL CONFIRM

## Save

### Step 1:

Click the **Save** button




Submit Save Delegate X

If you have not completed the form (required fields), the page will not save and show what required fields are missing by noting in red

Supervisor Review

Form Workflow Details



## Faculty and Staff Employee Fee Waiver Application

Employee Information  
School-Related Information  
Course Information  
Request Reimbursement of Application Fee  
Tax Implications  
Authorizations  
**Immediate Supervisor Review And/Or Authorization**

### Immediate Supervisor Review

1. Are you granting employee's request for release time to take one of the above fee waiver course? ☐ Yes ☒ No

2. Will the course(s) require a change in the employee's work schedule? ☐ Yes ☐ No List days and times

### Immediate Supervisor Approval

☐ Please indicate that you have completed the review

**This Field is a required field.**

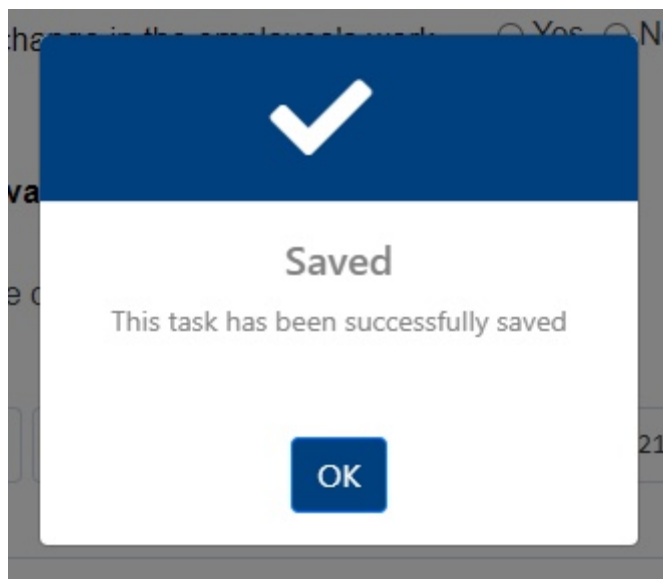
\* Print Name  \* Signature  \* Date  mm/dd/yyyy \* Recommend ☒ Approval ☐ Denial

**This Field is a required field.** **This Field is a required field.** **This Field is a required field.**

Comments

Generate PDF

Once you have included all required fields, upon clicking the Save button, the screen will refresh with a Save confirmation message

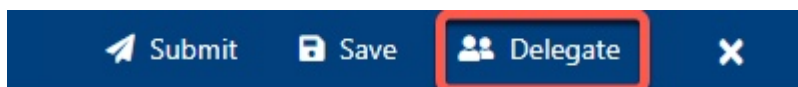


## Delegate

To set a delegate (assign another person to process the document in question), you will need to specify the delegate

### **Step 1:**

Click the **Delegate** button in the upper right hand corner



### **Step 2:**

Click the **User** drop-down caret

### **Step 3:**

Select the appropriate user to delegate to

The screenshot shows a 'Delegate Item' dialog box with a dark blue header and a close button (X). Below the header is a 'User' label and a dropdown menu. The dropdown menu is open, showing a list of users: Happy Hogan (highlighted), Clint Barton, Phil Coulson, Christine Everhart, Nick Fury, Maria Hill, Pepper Potts, and Tony Stark. A red arrow points to the dropdown list.

#### **Step 4: (Optional)**

Leave comments in the **Comments(Optional)** field

The screenshot shows the 'Delegate Item' dialog box with the 'User' dropdown menu set to 'Maria Hill'. Below the dropdown is a text input field labeled 'Comments(Optional)'. A red arrow points to this field. At the bottom of the dialog are 'CANCEL' and 'SUBMIT' buttons. A date field 'mm/dd/yyyy' is visible at the very bottom.

## Step 5:

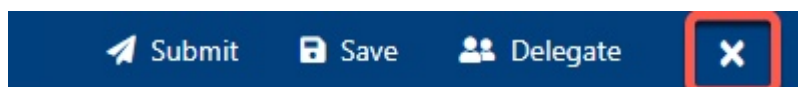
Click on the **Cancel** or **Submit** button:

- Cancel to cancel submitting the delegate specification
- Submit to proceed in submitting the delegate specification

## Exit

### Step 1:

Click the **X** icon



The screen will refresh to your **My Tasks** view

CSUF Forms							
HOME MY FORMS MY DRAFTS MY TASKS ADMINISTRATION							
Type here to search							
Title	Priority	Description	Assignee	Workflow	Status	Start Date	Due Date
<input type="checkbox"/> Department Chair Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 9:41:24 AM	
<input type="checkbox"/> HR Compensation Review	MEDIUM			Personnel File Access	ACTIVE	4/7/2021 9:32:50 AM	
<input type="checkbox"/> HR Compensation Review	MEDIUM			Personnel File Access	ACTIVE	4/7/2021 9:31:24 AM	
<input type="checkbox"/> HR Compensation Review	MEDIUM			Personnel File Access	ACTIVE	4/7/2021 9:26:37 AM	
<input type="checkbox"/> HRDI/Total Wellness Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 7:18:37 AM	
<input type="checkbox"/> HRDI/Total Wellness Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 5:10:11 AM	
<input type="checkbox"/> Supervisor Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 5:8:9 AM	
<input type="checkbox"/> Supervisor Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 4:57:52 AM	
<input type="checkbox"/> Supervisor Review	MEDIUM			Timebase Change Request	ACTIVE	4/7/2021 4:41:39 AM	
<input type="checkbox"/> Department Chair Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 2:12:38 AM	

Show 10 entries Showing 1 to 10 of 381 entries

## Forms Tabs

### My Forms Tab

#### To search for a form:











- Utilize the search bar
- Utilize the page buttons for a manual search

CSUF Forms		
HOME MY FORMS MY DRAFTS MY TASKS ADMINISTRATION		
Type here to search		
Form Name		Actions
10_12_11_12_PayPlan		
Appeals		
Catastrophic Leave Donation (Total Wellness)		
Catastrophic Leave Request (Total Wellness)		
Certificate Of Eligibility		
CMS 634 Distributed		
COBRA - Final Notice (Total Wellness)		
COBRA - Initial Notice (Total Wellness)		
COBRA - VSP Enroll (Total Wellness)		
Cobra Enroll Delta		

Show 10 entries Showing 1 to 10 of 60 entries

#### Launch a form:

Click on the arrow that coordinates to the document you would like to launch

CSUF Forms	
HOME	MY FORMS MY DRAFTS MY TASKS ADMINISTRATION ▾
Type here to search	
Form Name	Actions
10_12_11_12_PayPlan	
Appeals	
Catastrophic Leave Donation (Total Wellness)	
Catastrophic Leave Request (Total Wellness)	
Certificate Of Eligibility	
CMS 634 Distributed	
COBRA - Final Notice (Total Wellness)	
COBRA - Initial Notice (Total Wellness)	
COBRA - VSP Enroll (Total Wellness)	
Cobra Enroll Delta	
Showing 1 to 10 of 60 entries	
<div>Show 10 entries</div> <div>1 2 3 4 5 6</div>	

## My Drafts Tab

Any saved documents that you have not submitted will show in the My Drafts tab.





Note: You will not be able to view drafts saved by other users.

### **Locate draft:**

- A) Utilize the search bar
- B) Utilize the page buttons for a manual search




**CSUF Forms**


[HOME](#)
[MY FORMS](#)
[MY DRAFTS](#)
[MY TASKS](#)
[ADMINISTRATION ▾](#)

A



Form Name	Description	Date Modified	Actions
Department Chair Review		32 Days Ago	
HR Compensation Review		22 Days Ago	
HRDI/Total Wellness Review		15 Hour 47 Minutes Ago	
Supervisor Review		26 Days Ago	
Department Chair Review		26 Days Ago	
COBRA - VSP Enroll		26 Days Ago	
COBRA - VSP Enroll		26 Days Ago	
COBRA - VSP Enroll		27 Days Ago	
Cobra Final Notice		54 Days Ago	
Dependent Fee Waiver Application		69 Days Ago	

Show  entries
Showing 1 to 10 of 21 entries
B

☒ 1
☐ 2
☐ 3

# Show Saved Form:

Click on the 'eye' icon


**CSUF Forms**


[HOME](#)
[MY FORMS](#)
[MY DRAFTS](#)
[MY TASKS](#)
[ADMINISTRATION ▾](#)

Form Name	Description	Date Modified	Actions
Department Chair Review		32 Days Ago	
HR Compensation Review		22 Days Ago	
HRDI/Total Wellness Review		15 Hour 47 Minutes Ago	
Supervisor Review		26 Days Ago	
Department Chair Review		26 Days Ago	

➔

# Start a new form (with current form data):

Click on the 'plus' icon

CSUF Forms			
HOME MY FORMS MY DRAFTS MY TASKS ADMINISTRATION ▾			
Type here to search			
Form Name	Description	Date Modified	Actions
Department Chair Review		32 Days Ago	
HR Compensation Review		22 Days Ago	
HRDI/Total Wellness Review		15 Hour 47 Minutes Ago	
Supervisor Review		26 Days Ago	
Department Chair Review		26 Days Ago	

## Delete:

Click on the 'trash' icon

CSUF Forms			
HOME MY FORMS MY DRAFTS MY TASKS ADMINISTRATION ▾			
Type here to search			
Form Name	Description	Date Modified	Actions
Department Chair Review		32 Days Ago	
HR Compensation Review		22 Days Ago	
HRDI/Total Wellness Review		15 Hour 47 Minutes Ago	
Supervisor Review		26 Days Ago	
Department Chair Review		26 Days Ago	

## My Tasks Tab

### Viewing Tasks:

You can view the tasks by list view or icon view

For list view, click on the list button

CSUF Forms

HOME MY FORMS MY DRAFTS MY TASKS ADMINISTRATION

Type here to search

Title	Priority	Description	Assignee	Workflow	Status	Start Date	Due Date
<input type="checkbox"/> Department Chair Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 9:41:24 AM	
<input type="checkbox"/> HR Compensation Review	MEDIUM			Personnel File Access	ACTIVE	4/7/2021 9:32:50 AM	
<input type="checkbox"/> HR Compensation Review	MEDIUM			Personnel File Access	ACTIVE	4/7/2021 9:31:24 AM	
<input type="checkbox"/> HR Compensation Review	MEDIUM			Personnel File Access	ACTIVE	4/7/2021 9:26:37 AM	
<input type="checkbox"/> HRDI/Total Wellness Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 7:18:37 AM	
<input type="checkbox"/> HRDI/Total Wellness Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 5:10:11 AM	
<input type="checkbox"/> Supervisor Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 5:8:9 AM	
<input type="checkbox"/> Supervisor Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 4:57:52 AM	
<input type="checkbox"/> Supervisor Review	MEDIUM			Timebase Change Request	ACTIVE	4/7/2021 4:41:39 AM	
<input type="checkbox"/> Department Chair Review	MEDIUM			Employee Fee Waiver	ACTIVE	4/7/2021 2:12:38 AM	

Show 10 entries Showing 1 to 10 of 381 entries

1 2 3 4 5 ... 39

For icon view, click on the icon button

CSUF Forms

HOME MY FORMS MY DRAFTS MY TASKS ADMINISTRATION

Type here to search

<p>Department Chair Review</p> <p>MEDIUM</p> <p>4/7/2021 9:41:24 AM</p> <p>ACTIVE</p>	<p>HR Compensation Review</p> <p>MEDIUM</p> <p>4/7/2021 9:32:50 AM</p> <p>ACTIVE</p>	<p>HR Compensation Review</p> <p>MEDIUM</p> <p>4/7/2021 9:31:24 AM</p> <p>ACTIVE</p>	<p>HR Compensation Review</p> <p>MEDIUM</p> <p>4/7/2021 9:26:37 AM</p> <p>ACTIVE</p>
<p>HRDI/Total Wellness Review</p> <p>MEDIUM</p> <p>4/7/2021 7:18:37 AM</p> <p>ACTIVE</p>	<p>HRDI/Total Wellness Review</p> <p>MEDIUM</p> <p>4/7/2021 5:10:11 AM</p> <p>ACTIVE</p>	<p>Supervisor Review</p> <p>MEDIUM</p> <p>4/7/2021 5:8:9 AM</p> <p>ACTIVE</p>	<p>Supervisor Review</p> <p>MEDIUM</p> <p>4/7/2021 4:57:52 AM</p> <p>ACTIVE</p>

## Locate task:

- Utilize the search bar
- Utilize the page buttons for a manual search

**CSUF Forms**

HOME FORMS CATALOG MY DRAFTS **MY TASKS**

Type here to search

Title	Priority	Description	Assignee	Workflow	Status	Start Date	Due Date
<input type="checkbox"/> HR Benefits Review	MEDIUM		HR-Benefits-Reviewers	Domestic Partner Certification	ACTIVE	2/22/2021 3:25:56 PM	
<input type="checkbox"/> HR Review	MEDIUM		HR-Benefits-Reviewers	Catastrophic Leave Request	ACTIVE	2/22/2021 3:21:24 PM	
<input type="checkbox"/> HR Review	MEDIUM		HR-Benefits-Reviewers	Catastrophic Leave Request	ACTIVE	2/22/2021 3:17:40 PM	
<input type="checkbox"/> Payroll Review	MEDIUM		Payroll - Reviewers	Catastrophic Leave Donation	ACTIVE	2/22/2021 3:15:12 PM	
<input type="checkbox"/> Manager Review	MEDIUM		anperez	Career Development Plan	ACTIVE	2/22/2021 3:10:43 PM	
<input type="checkbox"/> Payroll Review	MEDIUM		Payroll - Reviewers	Catastrophic Leave Donation	ACTIVE	2/22/2021 3:8:48 PM	
<input type="checkbox"/> Manager Review	MEDIUM		ssmith	Career Development Plan	ACTIVE	2/22/2021 2:59:19 PM	
<input type="checkbox"/> HR Benefits Review	MEDIUM		HR-Benefits-Reviewers	Domestic Partner Certification	ACTIVE	2/22/2021 1:55:11 PM	
<input type="checkbox"/> HR Compensation Review	MEDIUM		HR-Compensation-Review	Personnel File Access	ACTIVE	2/22/2021 4:43:55 AM	
<input type="checkbox"/> HR Compensation Review	MEDIUM		jluzzi	New Position Description - Staff	ACTIVE	2/22/2021 3:36:2 AM	

Show 10 entries Showing 1 to 10 of 298 entries

1 2 3 4

## Open Task:

Check the box that coordinates to the tasks you would like to open

**CSUF Forms**

HOME MY FORMS MY DRAFTS **MY TASKS** ADMINISTRATION

Type here to search

Title	Priority
<input type="checkbox"/> Department Chair Review	MEDIUM
<input type="checkbox"/> HR Compensation Review	MEDIUM
<input type="checkbox"/> HRDI/Total Wellness Review	MEDIUM
<input type="checkbox"/> Supervisor Review	MEDIUM
<input type="checkbox"/> Department Chair Review	MEDIUM

Click the **Open** button

CSUF Forms

Type here to search

Title	Priority	Description	Assignee	Workflow	Status	Start Date	Due Date
<input type="checkbox"/> HR Benefits Review	MEDIUM		HR-Benefits-Reviewers	Domestic Partner Certification	ACTIVE	2/22/2021 3:25:56 PM	
<input checked="" type="checkbox"/> HR Review	MEDIUM		HR-Benefits-Reviewers	Catastrophic Leave Request	ACTIVE	2/22/2021 3:21:24 PM	

Open

The page will refresh to show your open document

In the upper right hand corner there are several buttons for your use:

- Submit
- Save
- Delegate
- Exit

Supervisor Review

Form Workflow Details

### Faculty and Staff Employee Fee Waiver Application

Employee Information

School-Related Information

Course Information

Request Reimbursement of Application Fee

Tax Implications

Authorizations

Immediate Supervisor Review And/Or Authorization

**EMPLOYEE INFORMATION**

\* Empl ID

\* First Name

\* Last Name

\* Department

\* Email

**JOB-RELATED INFORMATION**

\* Bargaining Unit

\* Job Code

\* Are you on Leave?

☐ Yes ☒ No

\* Probation Status

☐ Tenure ☒ Perm ☐ Probationary ☐ Other

Temp Status

☐ Temporary

End Date

mm / dd / yyyy

☒ Full-time ☐ Part-time

Generate PDF

## Need More Help?

For questions or assistance, please contact HRDI at:

[hrdievaluations@fullerton.edu](mailto:hrdievaluations@fullerton.edu)