

**California State University
Conflict of Interest
Designated Position Update Process**

User Guide



**Human Resources
2006**

Human Resources Administration designed the Conflict of Interest (COI) Designated Position Update Process (DPUP) to simplify the process of reporting COI designated position list changes to the Chancellor's Office. Campuses are to use DPUP to report new positions, job title changes, disclosure category changes, or eliminated positions and run reports.

Getting Started

The following functions are available from the main toolbar: Contact Information, Process Changes and Reports. Review Navigating the Forms to learn about the navigation bar located in the Process Change forms.

I. Contact Information

II. Navigating the Forms

III. Process Changes

1. Enter New Positions
2. Change Job Titles
3. Change Disclosure Categories
4. Eliminate Positions
5. Correct New Positions

IV. Reports

- A. Campus Designated Position List
- B. Designated Position List Changes

Microsoft Access Data Entry Notes

- There is not a "save" action in Access databases.
- Each of the following forms will automatically save the information as it is entered.
- Check spelling, punctuation, and capitalization before moving on to your next entry.
- The first letter of each word should be capitalized, however, do not capitalize words such as: of, and, for, ... etc.
- Examples of correct entries:
 - Director of Contracts and Procurement
 - Assistant Vice President, Business and Finance
 - Executive Assistant to the President
- Please note: After campus submittal of position changes, individual campus databases are merged into a single systemwide report that is submitted to the CSU Board of Trustees and the Fair Political Practices Commission.

I. Contact Information

Campuses will use this form to record Filing Officer information.

1. Click on Contact Info on the Toolbar.
2. Enter name, title, phone number, email, and select your campus.

Screenshot: Contact Information Form

CSU Conflict of Interest Filing Process
Contact Information

Last Name

First Name

Title

Phone No.

E-mail

Campus

II. Navigating the Forms

The Navigation Bar, located in the footer section of all the Process Change forms, allows you to:

- A. **Navigate through the Records in the Database**
- B. **Use Keywords to Quickly Locate Job Titles**
- C. **Cancel Changes Made to a Designated Position**
- D. **Close the Form**

Screenshot: Navigation Bar featured on Process Change Forms



A. Navigate through the Records in the Database

Designated Positions are sorted alphabetically.

First Record: Click to view the first designated position in the recordset

Previous Record: Click to view the previous designated position in the recordset

Next Record: Click to view the next designated position in the recordset

Last Record: Click to view the last designated position in the recordset

B. Use Keywords to Quickly Locate Job Titles

You also can locate a Designated Position by using a single keyword found in the job title.

1. Place the cursor in the "Job Title" field and type Control+F or choose Find from the Edit menu.
2. From the Match drop-down menu, select the option "**Any part of field.**"
3. Enter a single keyword found in the Designated Position job title in the "Find What" field.
4. Click on the Find Next button until you locate the Designated Position you want to edit.
5. Click on the Cancel button to return to the form.

C. Cancel Changes Made to a Designated Position

Click on Cancel Changes if you start making changes to a designated position and then decide to cancel the edit.

Note: This only works if you click Cancel before switching to another designated position or closing the form. To correct errors made after exiting the form, open the appropriate form and correct the information.

D. Close the Form

Click on Close Form to close the form.

III. Process Changes Forms

To make changes to your Designated Position List, click on the Process Changes menu on the main toolbar. Choose from one of the five options on the drop-down menu:

1. Enter New Positions
2. Change Job Titles
3. Change Disclosure Categories
4. Eliminate Positions
5. Correct New Positions

1. Enter New Positions

To add a new Designated Position to your list:

1. Click on Process Changes.
2. Select option 1. Enter New Positions.
3. Verify your campus using the drop-down menu.
4. Enter the job title, statement of reason, select appropriate disclosure categories and indicate if a job description will be submitted.
5. Click Next Record to continue adding positions.
6. Click Close Form when all new positions are entered and you want to exit the form.

Note: This is a data entry form. New positions entered will automatically be updated in the campus Designated Position List and Designated Position List Changes Report (see reports section for more information). To correct information after exiting this form, use Form 5 Correct New Positions.

Screenshot: New Position Entry Form

CSU Conflict of Interest Filing Process
Designated Position List: New Position Entry Form

Campus:

Job Title:

Statement of Reason:

Disclosure Categories:

<input type="checkbox"/> Category 1	<input type="checkbox"/> Category 5	<input type="checkbox"/> Category 9	<input type="checkbox"/> Category 13	<input type="checkbox"/> Category 17
<input type="checkbox"/> Category 2	<input type="checkbox"/> Category 6	<input type="checkbox"/> Category 10	<input type="checkbox"/> Category 14	
<input type="checkbox"/> Category 3	<input type="checkbox"/> Category 7	<input type="checkbox"/> Category 11	<input type="checkbox"/> Category 15	
<input type="checkbox"/> Category 4	<input type="checkbox"/> Category 8	<input type="checkbox"/> Category 12	<input type="checkbox"/> Category 16	

Are you submitting the Job Description?:

2. Change Job Titles

To change a Designated Position's job title:

1. Click on Process Changes.
2. Select option 2. Change Job Titles.
3. Verify your campus using the drop-down menu.
4. Locate the Designated Position whose Job Title you would like to change.
5. Enter the new job title in the To: field, a statement of reason, and indicate if a job description will be submitted.
6. Click Next Record to continue changing position Job Titles.
7. Click Close Form when all Job Titles have been updated and you want to exit the form.

Note: Use this form for ALL job title changes. (If you need to make corrections to the job title of a "new" position, use Form 5 Correct New Positions.)

Screenshot: Job Title Change Form

The screenshot shows a web form titled "CSU Conflict of Interest Filing Process" with a subtitle "Designated Position List: Job Title Change Form". The form contains the following fields:

- Campus:** A dropdown menu.
- Job Title:** Two text input fields labeled "From:" and "To:".
- Statement of Reason:** A large text area.
- Are you submitting the Job Description?:** A dropdown menu.

3. Change Disclosure Categories

To change a Designated Position's disclosure categories:

1. Click on Process Changes.
2. Select option 3. Change Disclosure Categories.
3. Verify your campus using the drop-down menu.
4. Locate the Designated Position whose Disclosure Categories you would like to change.
5. Select the applicable disclosure categories, enter a statement of reason, and indicate if a job description will be submitted.
6. Click Next Record to continue changing position Disclosure Categories.
7. Click Close Form when all Disclosure Categories have been updated and you want to exit the form.

Note: This form only allows disclosure category changes. If you need to change the job title of a designated position, please use Form 2 Job Title Changes. (If you need to make corrections to the disclosure categories of a "new" position, use Form 5 Correct New Positions.)

Screenshot: Disclosure Categories Change Form

CSU Conflict of Interest Filing Process
 Designated Position List: Disclosure Categories Change Form

Campus:

Job Title From:

To:

Statement of Reason:

Disclosure Categories:

<input type="checkbox"/> Category 1	<input type="checkbox"/> Category 5	<input type="checkbox"/> Category 9	<input type="checkbox"/> Category 13	<input type="checkbox"/> Category 17
<input type="checkbox"/> Category 2	<input type="checkbox"/> Category 6	<input type="checkbox"/> Category 10	<input type="checkbox"/> Category 14	
<input type="checkbox"/> Category 3	<input type="checkbox"/> Category 7	<input type="checkbox"/> Category 11	<input type="checkbox"/> Category 15	
<input type="checkbox"/> Category 4	<input type="checkbox"/> Category 8	<input type="checkbox"/> Category 12	<input type="checkbox"/> Category 16	

Are you submitting the Job Description?

4. Eliminate Positions

To eliminate a Designated Position from your List:

1. Click on Process Changes.
2. Select option 4. Eliminate Positions.
3. Verify your campus using the drop-down menu.
4. Locate the Designated Position you would like to eliminate.
5. Enter a statement of reason, and indicate if a job description will be submitted.
6. Click the Delete button.
7. Click Close Form when the appropriate Designated Positions have been eliminated and you want to exit the form.

Note: After you click on the delete button, the Designated Position will no longer appear in the recordset. If you accidentally delete a designated position, re-add the position using Form 1 Enter New Positions. Enter the exact phrase "RE-ADD EXISTING POSITION" in the Statement of Reason. To eliminate a "new" position, refer to Form 5 Correct New Positions, Note section.

Screenshot: Eliminate Position Form

CSU Conflict of Interest Filing Process
Designated Position List: Eliminate Position Form

Campus

Job Title to Eliminate

Statement of Reason

Are you submitting the Job Description? **Note: The job description is required only if the position ceases to be designated, but still exists on campus.**

Click to DELETE

5. Correct New Positions

To edit the data you entered for a new Designated Position:

1. Click on Process Changes.
2. Select option 5. Correct New Positions.
3. Verify your campus using the drop-down menu.
4. Locate the Designated Position you would like to edit.
5. Verify the Job Title, statement of reason, and indicate if a job description will be submitted.
6. Click Close Form after making your corrections and you want to exit the form.

Note: Eliminating New Positions – If you accidentally entered a “new position” (or a blank form) and it needs to be deleted from the recordset, follow steps 1 through 4 above for Correct New Positions. Once you have located and verified the new position that should be deleted, click on Edit on the Toolbar. Click on Delete Record. A warning message will appear confirming that you are about to delete 1 record. This feature is only available in Form 5.

Screenshot: New Position Correction Form

CSU Conflict of Interest Filing Process

Designated Position List: New Position Correction Form

Campus	<input type="text"/>
Job Title	<input type="text"/>
Statement of Reason	<input type="text"/>
Disclosure Categories	<input type="checkbox"/> Category 1 <input type="checkbox"/> Category 5 <input type="checkbox"/> Category 9 <input type="checkbox"/> Category 13 <input type="checkbox"/> Category 17 <input type="checkbox"/> Category 2 <input type="checkbox"/> Category 6 <input type="checkbox"/> Category 10 <input type="checkbox"/> Category 14 <input type="checkbox"/> Category 3 <input type="checkbox"/> Category 7 <input type="checkbox"/> Category 11 <input type="checkbox"/> Category 15 <input type="checkbox"/> Category 4 <input type="checkbox"/> Category 8 <input type="checkbox"/> Category 12 <input type="checkbox"/> Category 16
Are you submitting the Job Description?	<input type="text"/>

IV. Reports

The following reports are available for campus use, click on the Reports menu on the main toolbar. Choose from one of the three options on the drop-down menu:

- A. Campus Designated Position List
- B. Designated Position List Changes

A. Campus Designated Position List

Use this report to view and print your campus Designated Position List. *Note: Since changes you make to your Designated Position List will be incorporated into this report, it is recommended that you print this report before you begin inputting changes into the database.*

Report Snapshot: Designated Position List

California State University, Your Campus Name

(Displays alpha listing of designated positions)

(Applicable disclosure categories)

Designated Positions

- President
- Assistant Vice President, Student Life
- Dean, College of Natural Sciences
- Vice President, University Advancement

Disclosure Categories

- 1, 2, 3, 4, 5
- 3, 4, 5, 8, 9
- 3, 4, 7
- 3, 4, 5, 8, 9

B. Designated Position List Changes

Use this report to view and print changes you have made to your campus Designated Position List. This report should be printed to verify, and keep a record of, the changes you made to your campus Designated Position List for the current year's Conflict of Interest filing process. Please review and verify the changes you have made and make any needed corrections to the database. To ensure your corrections are reflected in the database, close the report and rerun the report after you have made all the corrections. *Note: Running this report prior to inputting any changes into the database will result in an error message on the report.*

Report Snapshot: Designated Position List Changes

California State University, Your Campus Name

1. Job Title Changes (Only) *(The type of change will be indicated here)*

(Old job title listed)

(New job title listed)

<u>From</u>	<u>To</u>	<u>Disclosure Categories</u>	<u>Statement of Reason</u>	<u>Job Description</u>
• Assistant Vice President, Student Services	Assistant Vice President, Student Life	1, 2, 3, 4, 5	Change in job description	<input checked="" type="checkbox"/>
• Vice President, University Development	Vice President, University Advancement	3, 4, 5, 8, 9	Change in job description	<input checked="" type="checkbox"/>

Please review carefully your campus Designated Position List and DPL Changes Report to verify accuracy of data.