

Temporary Computing Account for Special UC Davis Affiliates

Guest faculty and staff, visiting scholars and others may receive temporary computing privileges when deemed necessary by an affiliated University of California, Davis department. Temporary accounts are active for a maximum of one (1) year, or until the owner's affiliation with UC Davis ends, whichever comes first. Renewal of this account is required for continuation of services beyond one (1) year.

There are four parts to completing the Online TAF. The first step is the initialization. The process is initiated by a UC Davis sponsor or proxy. Once the necessary data has been entered, the TAF is automatically routed via email to the affiliate for detailed information about them. This routing begins the second part of the process. After the affiliate has entered their information, the TAF is automatically routed via email back to the sponsor to verify the affiliate's information and then the TAF is routed via email to the approver for approval and subsequent granting of temporary computing privileges.

Part 1: Sponsor Fills Out General Affiliate Information

The sponsor is required to submit the following information in the following order.

1. **Affiliate's name:** First Name, Middle Name, Last Name
2. **Present email address of affiliate:** This is the affiliate's email address for contact and routing of the Online TAF.
3. **End date:** Day, Month, Year. This field will auto-verify that the projected end date is within a year of the submission date.
4. **Type:** Select a radio button representing the best description of the affiliate's role with UC Davis.
5. **Department:** From the pull-down menu, select the department you will be working with to sponsor the temporary affiliate. Departments are listed in alphabetical order by division, department, college, and school.
6. **Comments for affiliate:** This area is used to document notes or questions relating to the Online TAF. These comments will be pasted into an automated email and forwarded in the notice to the affiliate. The sponsor will also receive an email verifying the information they have entered, including comments.
7. **Sponsor's Agreement:** This states the intended use of the temporary computing privileges. When the sponsor clicks "Yes, I agree," the Online TAF will automatically be forwarded to the affiliate. If "No, I do not agree" is selected, the Online TAF process will be canceled.

The screenshot shows the 'Temporary Affiliate Form' interface. At the top, there is a navigation bar with 'UC DAVIS' and 'INFORMATION EDUCATIONAL TECHNOLOGY' logos, and links for 'UC Davis' and 'IET Home'. Below this is a menu with 'Future Students', 'Current Students', 'Faculty', 'Staff', 'Parents', 'Alumni & Friends', and 'Business Community'. The main heading is 'Temporary Affiliate Form'. Underneath is an 'Instructions' box stating that the sponsor fills out this section, and the affiliate will be invited to complete it. The form fields include: 'Affiliate's Name' with three text boxes for 'First', 'Middle', and 'Last'; 'Present email address of affiliate' with a single text box; 'End date' with 'Day', 'Month' (dropdown), and 'Year' (dropdown) boxes, and a note '* One year or less from today; renewable after this date'; 'Type' with a grid of radio button options including 'Visiting Teaching Faculty', 'Consultant', 'Visiting Graduate Student', etc.; 'Department' with a dropdown menu showing '061425 - VP-INFO & EDUCATIONAL TECH'; and 'Comments for affiliate' with a large text area. A legend indicates '* Required fields.' At the bottom, there is a 'Sponsor's Agreement' section with a paragraph of text and two buttons: 'Yes, I agree' and 'No, I do not agree'.

8. **Part 1 is complete:** Affiliate completes step 2.

Part 2: Affiliate Updates Form and Adds Additional Personal Information

The temporary affiliate is required to complete the second part of the process. This is to be submitted online. When the sponsor completes part 1, a link will be sent to the affiliate's email address as listed in the sponsor's initiation of the TAF process.

1. **Affiliate's name:** The affiliate's name will be populated in the first line of the form. If it needs to be edited, please take a moment to edit the affiliate's (your) name before submitting the filled-out form to the sponsor.

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Temporary Affiliate Form

Instructions

This section of the form is to be filled out by the temporary affiliate.

Affiliate's Name *	First	Middle	Last
	Tom	George	Smith
Date of Birth *	Day	Month	Year
		Jan	
<input type="checkbox"/> I was previously a UCD student, or am a current student on PELP or filing fee status	Enter your Student ID number, if known. This is not your Social Security Number.		
<input type="checkbox"/> I was previously a UCD employee	Enter your Employee ID number, if known. This is not your Social Security Number.		
Address * At least one address is required	Home	Local	Business
	Street Line 1	Street Line 1	Street Line 1
	Street Line 2	Street Line 2	Street Line 2
	City, State, ZIP	City, State, ZIP	City, State, ZIP
	Country	Country	Country
Phone *			
Email Address *	tajurach@ucdavis.edu		
Type	Concurrent Student		
Comments for sponsor			

* Required fields.

2. **Date of Birth:** Day, Month (pull down) and year (4 digits)
3. **Previous student status:** This is a two part entry. If the affiliate was a UC Davis student, check the box on the left and enter (if known) the corresponding student I.D. number.
4. **Previous employee status:** This is a two part entry. If the affiliate was a UC Davis employee, check the box on the left and enter (if known) the corresponding employee I.D. number.
5. **Address:** Here, you'll see three columns. The affiliate has the capability to add multiple addresses.
6. **Phone:** The affiliate's phone number must be entered without parentheses – but hyphens are accepted. For instance 123-456-7890 is acceptable. (123) 456-7890 will be rejected and you will be provided with an opportunity to re-enter the phone number before the Online TAF will be accepted and routed to the next step in the process.
7. **Email address:** This is the affiliate's email address as entered by the sponsor. If the temporary affiliate wishes to have future correspondence sent to another address, enter that email address in this area and after this form is submitted, all correspondence will be sent to the email address entered.
8. **Type:** This information is populated from the sponsor's original data entry and categorized the temporary affiliate. If this information is incorrect, please enter the correct affiliation in the comments field.
9. **Comments for sponsor:** Enter any comments you wish your sponsor to read. These comments will be pasted into an automated email and forwarded in the notice to the next person in the process. The sponsor will also receive an email verifying the information they have entered, including comments.
10. **Affiliate's agreement:** Read and understand the Affiliate's Agreement at the bottom of the online form. This states the intended use of the temporary computing privileges. When the sponsor clicks "Yes, I agree," the Online TAF will automatically be forwarded to the next individual in the process. If "No, I do not agree" is selected, the process will be canceled.
11. **Step 2 is now complete:** The sponsor will verify the affiliate's information and then forward the affiliate's application to the approver.

Part 3: Sponsor Confirms Affiliate Information and Assigns an Approver

1. **Follow the link:** You (the sponsor) will receive an email in your inbox when the affiliate completes their portion. In your email, there will be a link to the page shown, below. Follow the link in your email to the below page to complete the Online Temporary Affiliate Form.
2. **View the screenshot, below.** When you get to the page, you will see a form that is largely grayed out except for a comments area.

Temporary Affiliate Form

Instructions

The sponsor should review the form and approve or deny it. If denied, the temporary affiliate will be invited to make the requested changes and resubmit it for approval. Otherwise, it will be sent to the designated departmental approver.

Affiliate's Name	First	Middle	Last
	Test	Only	Smith

Address	Home	Local	Business
	1234 Anystreet		
	Dog House, CA 97234		

Phone: 123-456-7890

Email Address: dhouse@ucdavis.edu

Fill this out and click the **No** button below if the temporary affiliate needs to make changes to the above.

Comments to Temporary Affiliate
(Leave blank if you will click Yes below)

Review of affiliate's information:
Click yes to continue to fill out the form. Click no if there are any problems with the information above, after filling out the comments box.

Doublecheck the grayed out information. This is information added by the applicant and it must be accurate before accepting the agreement at the bottom of the page.

Accurate? Click the "Yes, I agree" button.

If corrections need to be made, type them into the comment section and your comments will be forwarded back to the affiliate for correction after the "No, I do not agree" button is clicked.

3. **Verify the affiliate's information:** Verify that the information (grayed out) is accurate.
4. **Accept form or return it to affiliate:** **If the information is accurate, click "Yes, continue." Proceed to step 8.** If the information is inaccurate, follow the steps below.
5. **Return form to affiliate:** If the information is not accurate, you may fill in the comments area and instruct the affiliate what is incomplete, missing, or required additional attention. Click on the "No, send comments back to affiliate" button.
6. **Affiliate edits information:** The affiliate will then receive an email including your comments and will make the amendments as needed. When they complete their portion, the approver will receive another email notifying them that the affiliate has completed their part.
7. **Proceed to step 2.** You will receive an email in your inbox when the affiliate adjusts their form. In that email, there will be a link to the above page. Follow the link to complete this step and proceed from step 2 of Part 3's instructions.

8. **Denote your approver:** As the sponsor, you will select your departmental approver.
- a. **Select from the pull-down menu:** Select your departmental approver from the pull-down menu next to the top radio button. Once an approver is selected, click, “Yes, I agree” to route the Online TAF to the selected approver. Part 3 is now completed.
 - b. **Is an approver is not listed?** If an approver is not listed for your department, please select the lower radio button and you will be able to select from a list of approvers after you select the “Yes, continue” button at the bottom of the web page. Notes to the approver should be entered in the comments window. Proceed to step C.

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Temporary Affiliate Form

Instructions

The sponsor may now select an approver. You may select an approver from your department's known authorized approvers in the pull-down list below. If the person you want to submit the form to is not in that list, you may search for them on the next page.

Select a verified approver from your department:

The approver is not in the list above; I want to search for one on the next page.

Department Approval

Comments to Approver
(only if you have already selected an approver above)

- c. **Select approver from a searchable list:** After selecting the lower radio button, click “Yes, continue.” You are still required to select an approver from the next page (page shown in step number 9).

9. **Identify your approver from a searchable list:** The following screen has an interface that will enable you to search for your approver. You can select your approver by first name, last name, or email address. You will receive a list of compatible selections to your search data.

10. **Select approver:** From the list generated by the query (shown below), select the approver you wish to approve your affiliate. Please verify their “Approver” status, first.

Name	Title	Department	TAF Approver	TAF Title
<input type="radio"/> Matthew Jurach	Cmptr Rsrc Spec	UCDHS: ANESTHESIOLOGY & PAIN MEDICINE	No	
<input checked="" type="radio"/> Thomas Jurach	Analyst	OFFICE OF THE VICE PROVOST-INFORMATION AND EDUCATIONAL TECHNOLOGY	Yes	Department Chair
<input type="radio"/> Anne Jurach	ASSISTANT III	TEMPORARY EMPLOYMENT SERVICES	No	

11. **Submit to approver:** When the approver is verified, click the “Submit” button. This will advance the Online TAF to the end of the process.

Part 4: Approver Verifies Affiliate Information and Approves or Denies the Temporary Account.

1. **Verify information, add comments (if needed), then approve or deny:** In this screen, verify the affiliate's information, add comments for the sponsor if needed, and select the "Yes, I agree" button after reading and understanding the agreement and the Online TAF process will be completed. If you select, "No, I do not agree," the affiliate will not be granted a Temporary Computing Account at UC Davis and this process will be cancelled for that affiliate.

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Temporary Affiliate Form

Instructions

The sponsor should review the form and approve or deny it. If denied, the temporary affiliate will be invited to make the requested changes and resubmit it for approval. Otherwise, it will be sent to the designated departmental approver.

Affiliate's Name	First	Middle	Last
	Tom	George	Smith
Address	Home	Local	Business
	1 Shields Avenue		
	Davis, CA, 95616		
	USA		
Phone	530-754-6281		
Email Address	tajurach@ucdavis.edu		
Comments to Temporary Affiliate (leave blank if you will click Yes below)	Fill this out and click the No button below if the temporary affiliate needs to make changes to the above.		

Review of affiliate's information:
Click yes to continue to fill out the form. Click no if there are any problems with the information above, after filling out the comments box.