Common Financial System (CFS) Access Request Form Instructions

Staff may use this form to request access to BAS folders. To complete this form, follow the steps below.

1. Click the form link **Common Financial System (BAS-CFS) Access Form** available on the Campus Forms Gateway.

2. At the Sign in prompt, enter your **CSUB NetID** for the username and your **password** to authenticate.

3. In the Recipients section, enter the email addresses for the required **Recipients** (indicated by a red asterisk).
   - **Form Initiator**
     Enter the email address of the person who will identify the employee ID #, department and access level being requested. This can be someone requesting access on behalf of an employee.
   - **Employee**
     The employee who access is being requested for. This person will provide name, phone and email information.
   - **Manager (MPP) of Employee**
     The appropriate immediate manager who can approve the access form.
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<th>Step</th>
<th>Description</th>
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| 4    | In the Fields section,  
- **Employee Name**  
Enter the CSUB ID or Net ID of the person requesting access  
- **Employee’s CSUB ID**  
Enter the first and last name of the person requesting access |
| 5    | Click the **Submit** button and the following success message is displayed.  
*The agreement has been submitted successfully. The first recipient should receive an email shortly with a link to the agreement.* |
| 6    | When the requestor receives the email, click the **Review and Sign** link to open the form and enter the required information.  
[csbsign.na2.documents.adobe.com](csbsign.na2.documents.adobe.com) |
| 7    | On the form, supply the CSUB ID # and department of the person requesting access. Select the appropriate role(s) being requested. |
| 8    | The requestor should apply their electronic signature, by clicking or tapping on the Signature of Requester field. A small box will appear with several options to capture a signature.  
Once the signature is applied, click the “Click to Sign” button at the bottom to complete the signing process.  
The form will be automatically routed to the next signer. The requestor will receive a notification once the ITS Business Office has accepted the form after all signatures are collected.  
[Signature capture](signature_capture.png) |
| 9    | The **Approver(s)** entered when initiating the form will receive an email notification to review and sign the form to approve the requested access. All approvers will sign at the bottom. |
| 10   | Once all the Approver’s have signed the form, the **ITS Business Office** will accept the form.  
When the form is accepted, all signers will receive a notification and a completed copy of the form. |