Hello Redbird,

This how-to guide will show you each step to complete the online RSO Classification Assessment through the Kuali software.

RSO Classification Assessment
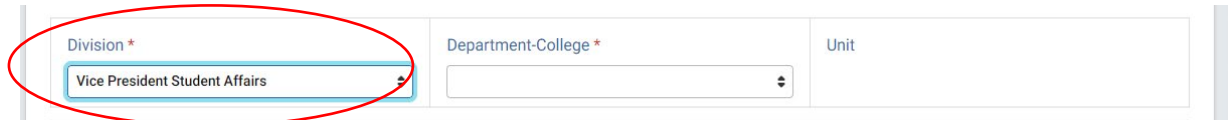
How-To

1. RSO Advisor should access the RSO Classification Assessment
   a. This form can only be viewed and submitted by Faculty/Staff at Illinois State University.
2. Complete the prompted fields on the online form.
   a. Registered Student Organization (RSO)
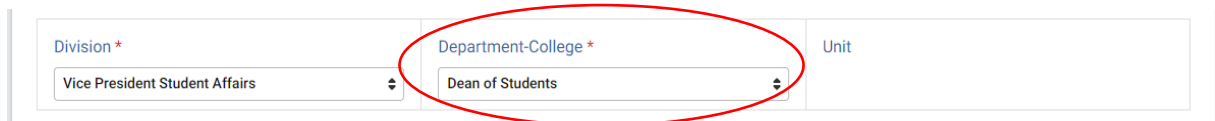   i. Enter the name of the RSO **exactly** as it is listed on Redbird Life

   b. Division
      i. Select the Division that your department/school or college reports to at Illinois State University.

   c. Department – College
      i. Select the department/school or college that will be sponsoring the Registered Student Organization.

d. Unit
   i. When possible, the "Unit" entry allows you to be more specific.
      a. Example RSO: Redbirds in Business
         i. Division: "Vice President & Provost"
         ii. College – Department: "College of Business"
         iii. Unit: "Department of Management"

Division *	Department-College *	Unit
Vice President Student Affairs	Dean of Students	Student Activities

e. Purpose
   i. Select whether the statement applies or does not apply to the RSO.
      a. Additional comments can be made as necessary.

Sponsored RSO Criteria

Purpose

The purpose and operations of the RSO are considered integral to the specific department/school listed above and/or the University.
- ◉ Applies to the above-stated RSO
- ○ Does not apply to the above-stated RSO

Additional Comments (Purpose)

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f. Authority
   i. Select whether the three statements apply or do not apply to the RSO.

Authority

The sponsoring department/school has approval and decision-making authority for RSO events/activities and will include a statement in the RSO constitution/by-laws stating as such. In accordance with University policy, authorized signers for the department/school will request and sign all contractual agreements for all RSO events/activities.
- ◉ Applies to the above-stated RSO
- ○ Does not apply to the above-stated RSO

Additional Comments (Decision-Making Authority)

The department/school, through the advisor identified below, provides oversight to the RSO. The departmental/school leadership has approval and denial authority for RSO activities.
- ◉ Applies to the above-stated RSO
- ○ Does not apply to the above-stated RSO

Additional Comments (Advisor Authority)

The advisor meets with the RSO on a regular basis and is well-versed on current and proposed events/activities of the RSO.
- ◉ Applies to the above-stated RSO
- ○ Does not apply to the above-stated RSO

Additional Comments (Meetings)

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g. Department/School or University understanding of liability.
    i. Review and select "Yes" if the statements are understood.

The Department/School understands it is responsible for events/activities of the Sponsored RSO which may lead to financial and other liabilities as the result of claims incurred by the University as a result of RSO events/activities. *

☑ Yes

The Department/School understands it is responsible for the following:
- The advisor will attend the annual RSO advisor training for sponsored RSOs provided through the Dean of Students Office.
- The Department/School shall actively oversee and must give prior approval for all Sponsored RSO events/activities.
- The Department/School shall monitor RSO compliance with the Events with Alcohol Procedures for Student Organizations as outlined on the Dean of Students Office website and shall make a referral to the Student Conduct and Community Responsibilities Office if the RSO fails to comply with the procedures.
- Any contracts for RSO events/activities will be made in the name of the University on behalf of the Department/School and all University policies and procedures relating to University contracts will be followed.
- The Department/School will make all travel arrangements for the RSO if awarded a student fee allocation.
- The Department/School is financially responsible for charges incurred by the RSO.
- The Department/School will establish and manage appropriate University financial accounts for the RSO.
- The Department/School will supply a University account number to the appropriate office upon request.

h. RSO Status
    i. Select whether the RSO meets the criteria to be sponsored or does not.

RSO Status *

◉ The Department/School affirms that the above-stated RSO meets all criteria listed above to be a SPONSORED RSO.

○ The above-stated RSO does not meet the criteria to be sponsored and is an INDEPENDENT RSO.

- Continue to the next page to understand the Kuali workflow -

For questions, contact Student Activities
at StudentOrganizations@IllinoisState.edu or (309) 438-2151.

1. Approvers
    a. This section of the Kuali form is for you (the RSO Advisor) to determine who from your sponsoring department/school or college should "sign" this form.
2. Please enter the ULID for the appropriate personnel
    a. The Kuali system will auto fill the remaining information.
    b. Enter the ULID where you see "rredbi5" or within the example "jtrotti."

Approvers

Final approval for classification will be granted by the Vice Presidents through the RSO Classification Review Committee. The Dean of Students Office will confirm the status of the RSO and send additional resources to assist the advisor/department/school/RSO.

	First Name	Last Name	Email Address
RSO Advisor ULID * Only lowercase letters should be used when entering the ULID. jtrotti	Jacob	Rottinghaus	jtrotti@ilstu.edu
Dept/School Business Manager ULID * Only lowercase letters should be used when entering the ULID. jtrotti	Jacob	Rottinghaus	jtrotti@ilstu.edu
Chair/Director ULID * Only lowercase letters should be used when entering the ULID. jtrotti	Jacob	Rottinghaus	jtrotti@ilstu.edu
AVP/Dean ULID * Only lowercase letters should be used when entering the ULID. jtrotti	Jacob	Rottinghaus	jtrotti@ilstu.edu

Auto Filled

For Workflow Purposes Only

The following data will be used to route the submitted form to the proper individuals in the workflow. If you see issues with the names in the route steps displaying below, contact the Technology Support Center [438-HELP (4357) or supportcenter@ilstu.edu] for assistance.

Created By
jtrotti@ilstu.edu

RSO Advisor ULID (HCM Lookup) *	RSO Advisor Name (Kuali Lookup) *	Dept/School Business Manager ULID (HCM Lookup) *	Dept/School Business Manager Name (Kuali Lookup) *
jtrotti	Jacob Rottinghaus	jtrotti	Jacob Rottinghaus
Chair/Director ULID (HCM Lookup) *	**Chair/Director Name (Kuali Lookup) ***	**AVP/Dean ULID (HCM Lookup)**	**AVP/Dean Name (Kuali Lookup)**
jtrotti	Jacob Rottinghaus	jtrotti	Jacob Rottinghaus

Auto Filled

3. Once you have verified that the correct individuals have be included in their correct workflow steps you may proceed to submit the form to the Dean of Students Office

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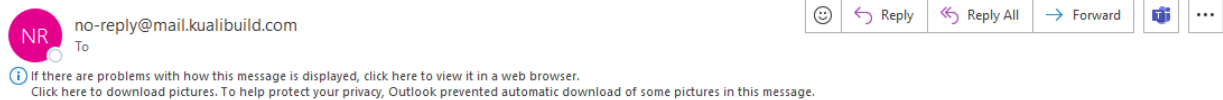
Required Actions

The Kuali system requires each person in the workflow to "take action" on the form for their assigned step in the workflow. After completing the workflow entries, the system will route to the appropriate person for you. When it is the next person's turn in the workflow process to "take action" they will be prompted to do so via their university email.

- This email notification will come from "no-reply@mail.kualibuild.com"

1. Access Kuali
   a. Via the email notification or,
   b. Via the Kuali online dashboard

Approval - RSO Classification Assessment - Jacob's RSO - TEST 2

NR no-reply@mail.kualibuild.com
To

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hello Jacob,

The RSO Classification Assessment request for Jacob's RSO - TEST 2 has been reviewed by the Dean of Students Office and requires your approval to initiate next steps.

To submit your decision, click the Review button below, or log in to MY to access the request. For detailed instructions, visit our Help documentation.

Form Name: **(DEV) RSO CLASSIFICATION ASSESSMENT**
Step Name: **RSO ADVISOR APPROVAL**
Your Action: **APPROVAL**

Begin Review

This email was automatically generated.

2. Access the Submission
   a. If you followed the email notification you can review, approve, deny, or send back directly from the populated screen.
   b. If you logged into your Kuali dashboard select "Action List" at the top of the screen
      i. Choose the submission on your "Action List" that you would like to review.

App	Document #	Submitted By	Workflow Step	Created On ↓	Action Requested
(DEV) RSO Classification Assessment	0045	Rottinghaus, Jacob	RSO Advisor Approval	Tue Mar 12 2024	Approval

-   Continue on for Additional Steps   -

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3. Actions
    a. Approve – select the "Approve" button in the upper right-hand corner.
        i. Can add comments if desired.
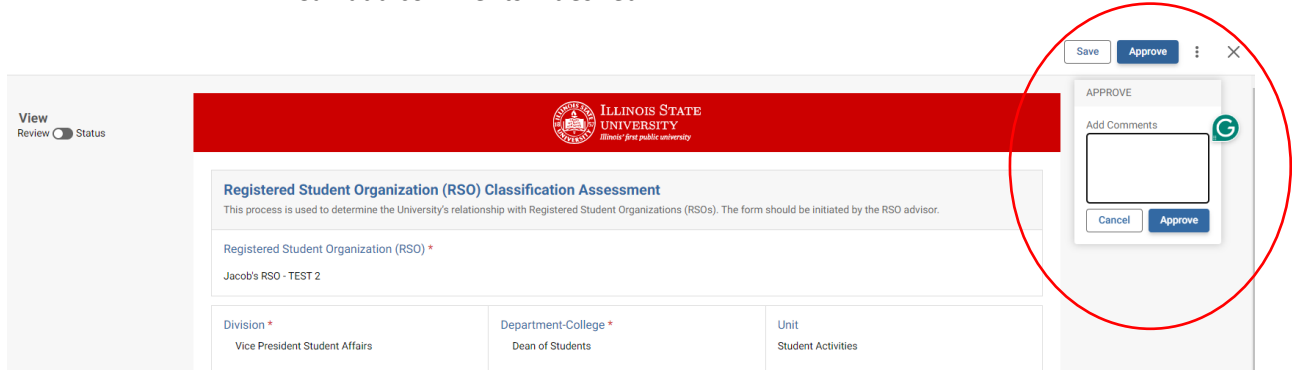
    b. Deny – select the "Deny" button by selecting the three dots in the upper right-hand corner.
        i. When you DENY a submission, it closes the submission out and will notify all parties in the workflow including the Dean of Students Office.
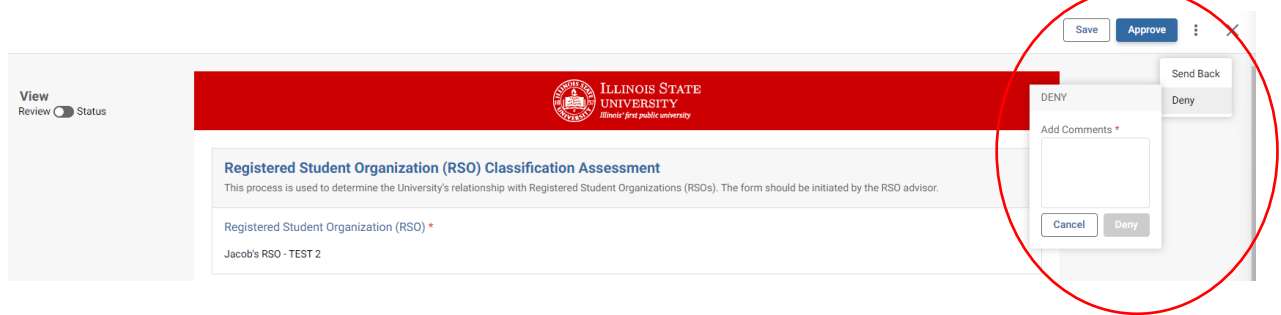
    c. Send Back – select the "Send Back" button by selecting the three dots in the upper right-hand corner.
        i. By selecting send back it will send the form for edits and review to the person that last reviewed the form.

4. Check the Status
    a. Need to see where in the process the Kuali form is currently located? Choose the toggle switch on the left-hand side of your screen to see the "status" of the form.

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