Grad Exceptions from the Audit (EFA) – PeopleSoft

Once an EFA is requested from the PAWS report, an automated process (runs daily, every 2 hours from 8am-6pm) will move the request into PeopleSoft for approval.

All Users will be able to look up a request by student ID or Sequence Number (given in the email) on the Request page. See page 2 for additional information.

All Users can also do more in-depth searches on the Search page. See page 3 for additional information.

Approvers will receive an email notification to review their Worklist once a request is pending. See page 4 for additional information.

Notifications:

All emails will come from: CSBPRD@calstate.edu

“EFA Request for approval” email will go to all approvers (Graduate Coordinator / Graduate Studies).

“EFA Request Denied” email will go to the student and initiator if a request is denied. A comment is required when a request is denied for reason/explanation.

“EFA Final approval” email will go to the student and initiator once processed by the Office of the Registrar, instructing them to view their PAWS report.

If a Graduate Coordinator initiates a request for their program, approval will be automatic and will route to the next step (Transfer and Graduation Counselor or Graduate Studies) for processing.

Contact Information:

For any general PAWS report inquiries, please contact the Office of the Registrar – Evaluations Unit – evalinfo@csusb.edu – x14202

For EFA specific questions, or to schedule additional training, please contact both:

Rachael Loverock – rloveroc@csusb.edu – x73515
Jennifer Bauer – j Bauer@csusb.edu – x73225
For ALL USERS -
There are 2 search features for EFA: EFA Request and EFA Search

SB Custom > SB SA Custom Menu > SB uAchieve EFA > SB uAchieve EFA Use > **SB uAchieve EFA Request**:

The request page allows you to search by ID to see all requests for a student.

You can also search by Sequence Number to narrow down to the specific request.

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<th>Academic Plan</th>
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</table>
SB Custom > SB SA Custom Menu > SB uAchieve EFA > SB uAchieve EFA Use > SB uAchieve EFA Search:

The search page can be used to do more in-depth searches.

You can search by student identifying information, requestor and/or approver, or request specific information like college, department, status, etc.
For APPROVERS - Once an EFA is requested from the PAWS report, a process must be run to move the request into PeopleSoft. This process will run several times a day to push the information to your worklist.

Once a request is picked up by the process, you will receive an email alerting you that there is an EFA request ready for your review. All routing from this point forward is in real-time.

The email will give basic information including who submitted the request, the student name and ID it is regarding, the type of request (GE, Major, Minor, etc), and a Sequence Number for easy retrieval.

An Exception from the Audit (EFA) has been requested and is ready for your review. Please log into PeopleSoft and access your worklist to review pending requests.

Requestor: Rachael Loverock
Student Name: Joe Coyote
Student ID: 000216420

Exception Requested For: General Education

If there are any questions, please contact a Transfer and Graduation Counselor in the Office of the Registrar and refer to the sequence number below:

Sequence Number: 1600003

Office of the Registrar - Evaluations Unit
Phone number: 909-537-5200, option 4.
Email: evalinfo@csusb.edu
Location: University Hall, room 171
Hours: Monday through Thursday from 8:00am to 6:00pm. Fridays from 8:00am to 5:00pm. Summer hours may vary.

Sincerely,
The Office of the Registrar

To access requests pending your approval, log into PeopleSoft and click on Worklist.

Click on the link to go directly to that specific request.
Run a PAWS report (it will not show requested changes) and compare to the changes requested on the EFA.

Things to know: The DPROG field will inform you what major to pull if there are multiple declared programs, as with the example above.

Things to watch for: What section of the PAWS report the change is for? If inserting or swapping a course, where is the new/replacement course located? Will moving that course effect any other requirements?

You can Add Comments, Approve and Deny from this page. Once Approved/Denied, the system will route to the next person in the workflow automatically. The request will be removed from your Worklist once you have Approved or Denied the request.

Approved exceptions will not show on the PAWS report until the final processing has been completed by the Office of the Registrar. These will be reviewed daily.