

Graduate 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:

Erin Vigil – Erin.Vigil@csusb.edu – x73819

Rachael Loverock – rloveroc@csusb.edu – x73515

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.

The screenshot shows the 'SB uAchieve EFA Request' search interface. It includes a search criteria section with fields for 'Empl ID' (beginning with '000226420') and 'Sequence Number' (set to '='), and search buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below this is a 'Search Results' table with columns: Empl ID, Sequence Number, Academic Career, Student Career Nbr, Academic Plan, DPROG, LAST_MOD_USER, LAST_MOD_DATE, and AWE_TYPE. The table displays five rows of data.

Empl ID	Sequence Number	Academic Career	Student Career Nbr	Academic Plan	DPROG	LAST_MOD_USER	LAST_MOD_DATE	AWE_TYPE
000226420	1600897	UGRD	0	BIOLCNSBAX	Biol-BA	000031238	04/02/2019 3:58:33PM	GE
000226420	1600899	UGRD	0	BIOLCNSBAX	Biol-BA	000226420	04/03/2019 7:54:27AM	GE
000226420	1600901	UGRD	0	BIOLCNSBAX	Biol-BA	000226420	04/03/2019 7:55:43AM	GE
000226420	1600903	UGRD	0	FIN_CBPBAX	FIN-BA	000031238	04/03/2019 5:12:01PM	GE
000226420	1600905	UGRD	0	FIN_CBPBAX	FIN-BA	000031238	04/04/2019 9:26:54AM	GE

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

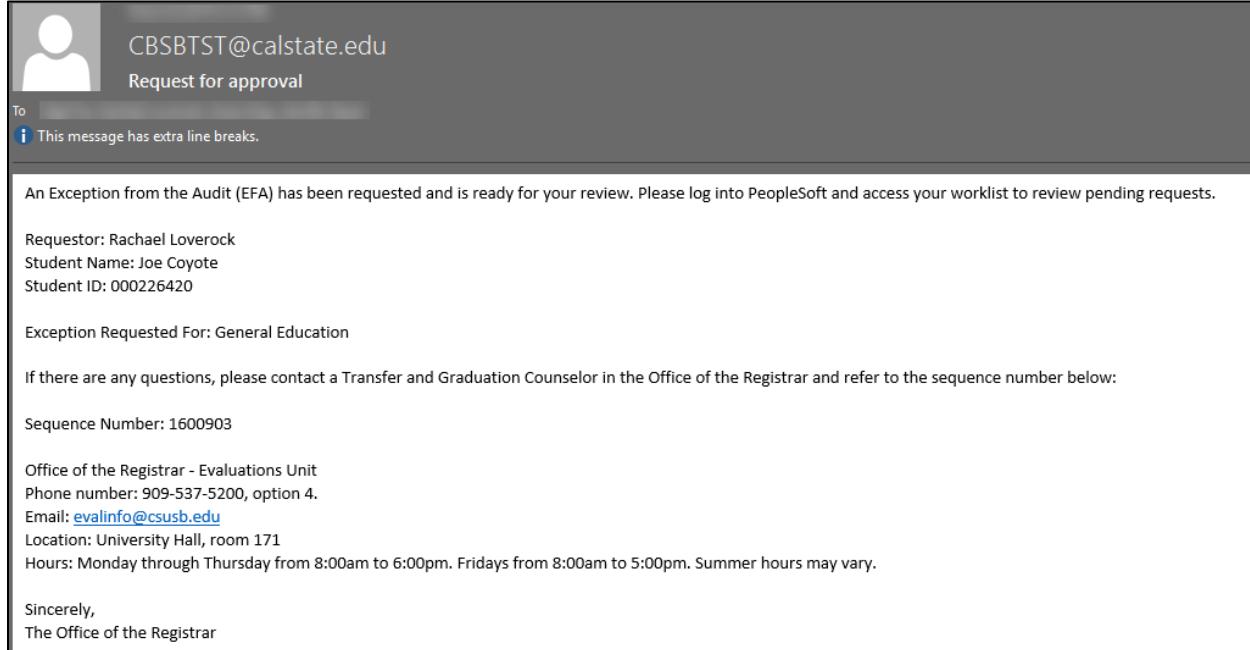
You can search by student identifying information, requestor or approver information, sequence number, or specific information like major, college, status, etc.

Student ID <input type="text"/> First Name <input type="text"/> Last Name <input type="text"/>	Requestor Requestor ID <input type="text"/> First Name <input type="text"/> Last Name <input type="text"/>																				
Requests Career <input type="text"/> College <input type="text"/>  Department <input type="text"/>  Request Type <input type="text"/> Control Code <input type="text"/> From Date <input type="text"/>  To <input type="text"/>  Status <input type="text"/>	Approver Approver ID <input type="text"/> Approval Status <input type="text"/>																				
Sequence # Sequence # <input type="text"/>	<input type="button" value="Search"/> <input type="button" value="Clear All"/>																				
<table border="1"><thead><tr><th></th><th>View</th><th>ID</th><th>DARS Seq #</th><th>Student Name</th><th>DPROG</th><th>Career</th><th>Career Nbr</th><th>Academic Plan</th><th>College</th></tr></thead><tbody><tr><td>1</td><td><input type="button" value="View"/></td><td></td><td></td><td></td><td></td><td></td><td></td><td>0</td><td></td></tr></tbody></table>			View	ID	DARS Seq #	Student Name	DPROG	Career	Career Nbr	Academic Plan	College	1	<input type="button" value="View"/>							0	
	View	ID	DARS Seq #	Student Name	DPROG	Career	Career Nbr	Academic Plan	College												
1	<input type="button" value="View"/>							0													

For APPROVERS - Once an EFA is requested from the PAWS report, an automatic process will 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's name and ID it is regarding, the type of request (Adv to Candidacy, Grad Program Majors, etc.), and a Sequence Number for easy retrieval.



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

Click on the link to go directly to that specific request.

The screenshot shows the PeopleSoft Worklist interface for 'Campus Solutions/Student Info'. The 'Worklist' page is displayed, showing three pending EFA requests:

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Rachael Anne Loverock	09/24/2021	Approval Routing	Approval Workflow		EFA - CED - GM - ES - 000226420 - Coyote Joe E	Mark Worked	Reassign
Rachael Anne Loverock	09/24/2021	Approval Routing	Approval Workflow		EFA - CED - GM - EI - 000226420 - Coyote Joe E	Mark Worked	Reassign
Rachael Anne Loverock	09/24/2021	Approval Routing	Approval Workflow		EFA - CED - GM - EO - 000226420 - Coyote Joe E	Mark Worked	Reassign

ID	000226420	Joe Coyote																
Request Type	GM																	
Sequence No.	1648012	DPROG CTEC-MA																
CTLCD	ES	Exception: Swap																
Majors																		
<table border="1"> <thead> <tr> <th></th> <th>Career</th> <th>Career Nbr</th> <th>Acad Prog</th> <th>Acad Plan</th> <th>Status</th> <th>Plan Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Postbac</td> <td>0</td> <td>GRAD</td> <td>CTECCEDMAX</td> <td>Active</td> <td>Major</td> <td>Career and Tech Education</td> </tr> </tbody> </table>				Career	Career Nbr	Acad Prog	Acad Plan	Status	Plan Type	Description	1	Postbac	0	GRAD	CTECCEDMAX	Active	Major	Career and Tech Education
	Career	Career Nbr	Acad Prog	Acad Plan	Status	Plan Type	Description											
1	Postbac	0	GRAD	CTECCEDMAX	Active	Major	Career and Tech Education											
Swapping in																		
<table border="1"> <tr> <td>ECTS5560</td> <td>ECTS 5560</td> </tr> </table>			ECTS5560	ECTS 5560														
ECTS5560	ECTS 5560																	
Swapping out																		
<table border="1"> <tr> <td>ECTS6350</td> <td>Research in Career and Technical Education</td> </tr> </table>			ECTS6350	Research in Career and Technical Education														
ECTS6350	Research in Career and Technical Education																	
Into																		
<p>REQUIRED CORE COURSES</p> <p>MUST BE COMPLETED WITH A "C" OR BETTER</p>																		
Using pseudo of	CTECSEMMMA-1	RNAME CTECSEMMMA																
Audit Note	SWAP: ECTS5560 FOR ECTS6350																	
Memo	Exception: Swap Course - Sub-Requirement # 1																	
Submitted by	000031238	Rachael Loverock																
On	09/24/2021 11:52:54AM																	
Comments																		
<table border="1"> <thead> <tr> <th></th> <th>Comment Date/Time</th> <th>Assigned Operator ID</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Comment Date/Time	Assigned Operator ID	Comment	1											
	Comment Date/Time	Assigned Operator ID	Comment															
1																		
<input type="button" value="Approve"/> <input type="button" value="Deny"/> <input type="button" value="Add Comments"/>																		
:Pending																		
Approvers																		
<table border="1"> <tr> <td>Pending</td> <td>Joseph Scarella Grad Coordinator</td> <td>→</td> <td>Not Routed</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Multiple Approvers GRAD TGC</td> </tr> </table>			Pending	Joseph Scarella Grad Coordinator	→	Not Routed				Multiple Approvers GRAD TGC								
Pending	Joseph Scarella Grad Coordinator	→	Not Routed															
			Multiple Approvers GRAD TGC															

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.

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 are reviewed daily.