

Undergraduate 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 (Department Chair / Dean of Undergraduate Studies).

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

If a Department Chair initiates a request for their major/minor, approval will be automatic and will route to the next step (Transfer and Graduation Counselor) for processing.

Contact Information:

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

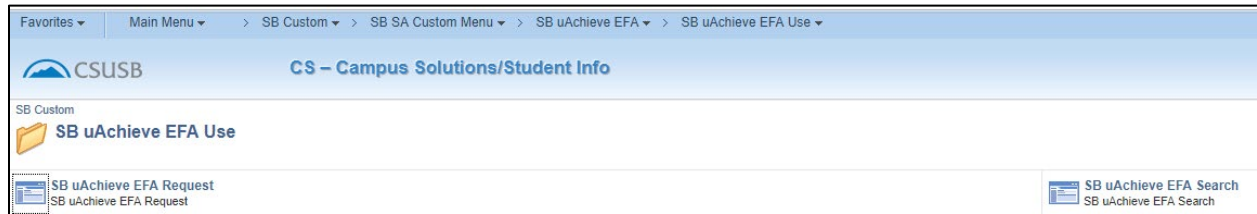
For EFA specific questions, or to schedule additional training, please contact both:

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, or by sequence number to view a specific request.

SB uAchieve EFA Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Empl ID

Sequence Number

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-5 of 5 Last

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

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 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"/>								

	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 (GE, Major, Minor, etc.), and a Sequence Number for easy retrieval.



CBSBTST@calstate.edu

Request for approval

To [redacted]

 This message has extra line breaks.

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: 000226420

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: 1600903

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.

Favorites

Main Menu

Worklist

Worklist

CSUSB

CS - Campus Solutions/Student Info

Home

Worklist

View Mobile Self Service

Add to Favorites

Sign out


New Window | Help | Personalize Page

Worklist

Worklist for 004171426: Craig Seal


[Detail View](#)

Worklist Filters

Worklist Items	From	Date From	Work Item	Worked By Activity	Priority	Link	Personalize	Find View All 	First	1-15 of 15	Last
	Rachael Anne Loverock	03/25/2019	Approval Routing	Approval Workflow		EFA-CBP-GE-EO-005951435-LOVEROCK			Mark Worked	Reassign	
	Rachael Anne Loverock	03/25/2019	Approval Routing	Approval Workflow		EFA-CBP-GE-ES-005951435-LOVEROCK			Mark Worked	Reassign	
	Rachael Anne Loverock	03/25/2019	Approval Routing	Approval Workflow		EFA-CNS-UH-EL-005237475-CARRERA.GROVATT			Mark Worked	Reassign	
	Nigel Ho	03/25/2019	Approval Routing	Approval Workflow		EFA-CBP-GE-EL-005951435-LOVEROCK			Mark Worked	Reassign	
	Nigel Ho	03/25/2019	Approval Routing	Approval Workflow		EFA-CNS-UH-EL-005237475-CARRERA.GROVATT			Mark Worked	Reassign	
	Rachael Anne Loverock	03/27/2019	Approval Routing	Approval Workflow		EFA-CNS-UH-ES-005237475-CARRERA.GROVATT			Mark Worked	Reassign	
	Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA-CNS-GE-ES-005237475-CARRERA.GROVATT			Mark Worked	Reassign	
	Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA-CNS-UH-EL-005237475-CARRERA.GROVATT			Mark Worked	Reassign	
	Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA-CNS-GE-ES-004281627-FLORES.EOWEN.MIC			Mark Worked	Reassign	
	Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA-CNS-GE-ES-004281627-FLORES.EOWEN.MIC			Mark Worked	Reassign	
	Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA-CNS-GE-ES-005237475-CARRERA.GROVATT			Mark Worked	Reassign	
	Rachael Anne Loverock	04/03/2019	Approval Routing	Approval Workflow		EFA-CNS-GE-ES-000225420-COYOTE.JOE.E			Mark Worked	Reassign	
	Joe Coyote	04/03/2019	Approval Routing	Approval Workflow		EFA-CNS-GE-EL-000225420-COYOTE.JOE.E			Mark Worked	Reassign	
	Joe Coyote	04/03/2019	Approval Routing	Approval Workflow		EFA-CNS-GE-EL-000225420-COYOTE.JOE.E			Mark Worked	Reassign	
	Rachael Anne Loverock	04/03/2019	Approval Routing	Approval Workflow		EFA-CBP-GE-EL-000225420-COYOTE.JOE.E			Mark Worked	Reassign	

Refresh

[Favorites](#) > [Main Menu](#) > [Worklist](#) > [Worklist](#) > [SB uAchieve EFA Request](#)


CS – Campus Solutions/Student Info

ID: Joe Coyote

Request Type: General Education

Sequence No.: DPROG: CTLCD: Exception: Insert

Majors

	Career	Career Nbr	Acad Prog	Acad Plan	Status	Plan Type	Description
1	Undergrad	0	UGRD	BIOLCNSBAX	Active	Major	Biology
2	Undergrad	0	UGRD	MTECCALMIN	Active	Minor	Music Technology
3	Undergrad	0	UGRD	FIN_CBPBAX	Active	Major	Admin - Finance Conc

Course Adding

<input type="text" value="FREN202"/>	<input type="text" value="test"/>
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Info

FOREIGN LANGUAGE OR LITERATURE IN TRANSLATION

Using pseudo of: RNAME:

Audit Note:

Memo:


Submitted by: Rachael Loverock

Comments


	Comment DateTime	Assigned Operator ID	Comment
1			

Exceptions for General Education: Pending

Approvers

Pending

 Craig Seal
 Undergraduate Studies Dean

→

Not Routed

 Jennifer Bauer
 Transfer/Graduation Counselor

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.