

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.

The screenshot shows the 'SB uAchieve EFA Request' search page. The page title is 'SB uAchieve EFA Request' and a sub-instruction says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there is a 'Find an Existing Value' button. The 'Search Criteria' section contains two input fields: 'Empl ID' with a dropdown menu set to 'begins with' and a value '000226420', and 'Sequence Number' with a dropdown menu set to '=' and an empty input field. At the bottom of this section are 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons. The 'Search Results' section has a 'View All' link and a table with the following 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.

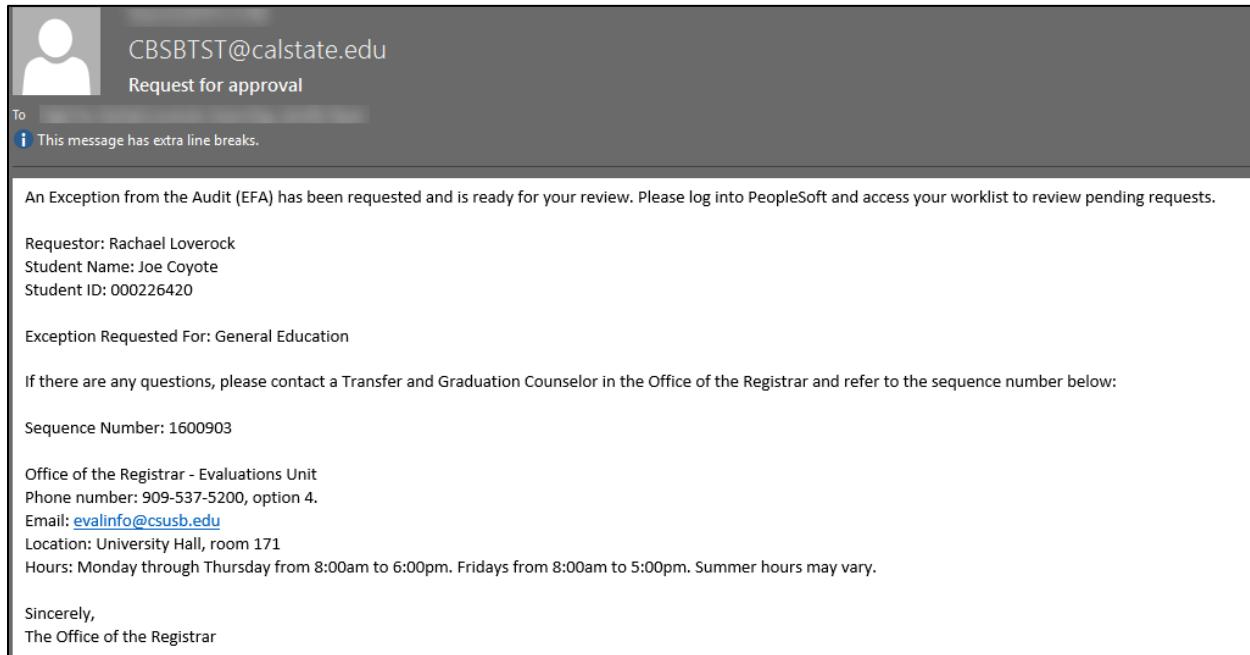
You can search by student identifying information, requestor or approver information, sequence number, or specific information like major, college, status, etc.

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 (GE, Major, Minor, 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 page for user Craig Seal. The page title is "CS – Campus Solutions/Student Info". The worklist is for request ID 004171426. The table displays the following columns: From, Date From, Work Item, Worked By Activity, Priority, Link, Personalize, Find, View All, Mark Worked, and Reassign. The table contains 15 rows of data, with the first few rows shown below:

From	Date From	Work Item	Worked By Activity	Priority	Link	Personalize	Find	View All	Mark Worked	Reassign
Rachael Anne Loverock	03/25/2019	Approval Routing	Approval Workflow		EFA - CRP - GE - EO - 00951435 - Coyote, Joe E				Mark Worked	Reassign
Rachael Anne Loverock	03/26/2019	Approval Routing	Approval Workflow		EFA - CNS - UN - EI - 005237475 - Coyote, Joe E				Mark Worked	Reassign
Rachael Anne Loverock	03/26/2019	Approval Routing	Approval Workflow		EFA - CNS - UN - EI - 005237475 - Coyote, Joe E				Mark Worked	Reassign
Nigel Ho	03/26/2019	Approval Routing	Approval Workflow		EFA - CNS - UN - EI - 005237475 - Coyote, Joe E				Mark Worked	Reassign
Nigel Ho	03/26/2019	Approval Routing	Approval Workflow		EFA - CNS - UN - EI - 005237475 - Coyote, Joe E				Mark Worked	Reassign
Rachael Anne Loverock	03/27/2019	Approval Routing	Approval Workflow		EFA - CNS - UN - ES - 005237475 - Coyote, Joe E				Mark Worked	Reassign
Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA - CNS - GE - ES - 005237475 - Coyote, Joe E				Mark Worked	Reassign
Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA - CNS - UN - EI - 005237475 - Coyote, Joe E				Mark Worked	Reassign
Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA - CNS - GE - ES - 004281627 - Flowers, Edwin M				Mark Worked	Reassign
Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA - CNS - GE - ES - 004281627 - Flowers, Edwin M				Mark Worked	Reassign
Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA - CNS - GE - ES - 005237475 - Coyote, Joe E				Mark Worked	Reassign
Rachael Anne Loverock	04/02/2019	Approval Routing	Approval Workflow		EFA - CNS - GE - ES - 000026420 - Coyote, Joe E				Mark Worked	Reassign
Joe Coyote	04/03/2019	Approval Routing	Approval Workflow		EFA - CNS - GE - EI - 000228420 - Coyote, Joe E				Mark Worked	Reassign
Joe Coyote	04/30/2019	Approval Routing	Approval Workflow		EFA - CNS - GE - EI - 000228420 - Coyote, Joe E				Mark Worked	Reassign
Rachael Anne Loverock	04/30/2019	Approval Routing	Approval Workflow		EFA - CRP - GE - EI - 000228420 - Coyote, Joe E				Mark Worked	Reassign

Favorites ▾ Main Menu ▾ > Worklist ▾ > Worklist > SB uAchieve EFA Request

 CS – Campus Solutions/Student Info

ID: 000226420 Joe Coyote

Request Type: GE General Education

Sequence No.: 1600903 DPROG: FIN-BA CTLCD: EI 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

FREN202	test
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Into
FOREIGN LANGUAGE OR LITERATURE IN TRANSLATION

Using pseudo of: GE-C3 RNAME: GE-CIA

Audit Note: INSERT: FREN 202

Memo: Exception: Insert Course - Sub-Requirement # 3. INSERT: FREN 202

Submitted by: 000031238 Rachael Loverock

Comments

	Comment Date/Time	Assigned Operator ID	Comment
1			

Exceptions for General Education: Pending

Approvers

Pending	Craig Seal Undergraduate Studies Dean	→	Not Routed	Jennifer Bauer Transfer/Graduation Counselor
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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.