

### 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](mailto: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](mailto:evalinfo@csusb.edu) – x14202

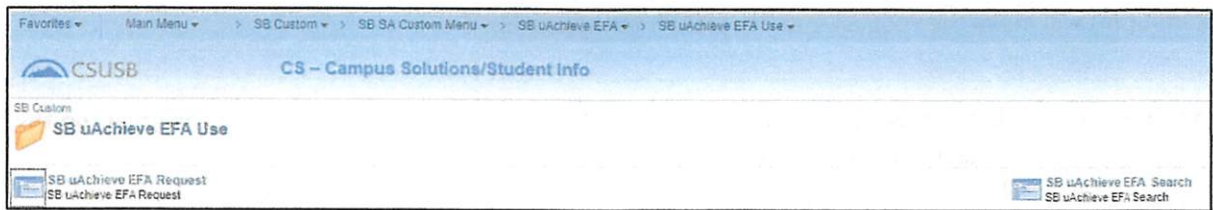
For EFA specific questions, or to schedule additional training, please contact both:

Rachael Loverock – [rloveroc@csusb.edu](mailto:rloveroc@csusb.edu) – x73515

Jennifer Bauer – [jbauer@csusb.edu](mailto:jbauer@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.

**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 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 and/or approver, or request specific information like college, department, status, etc.

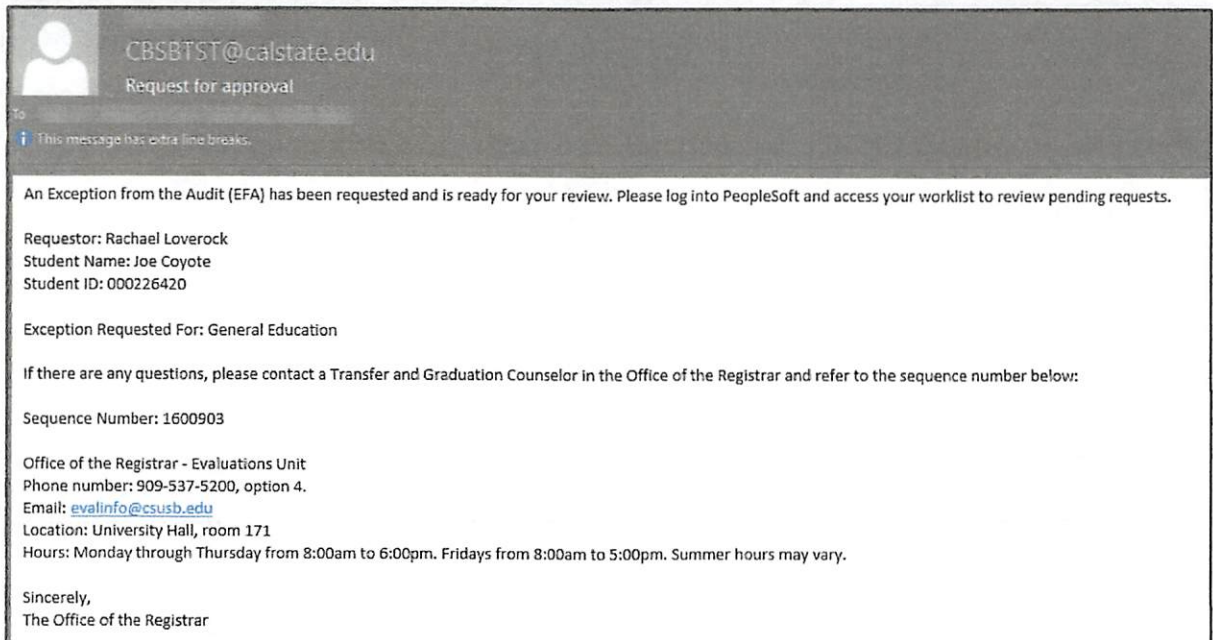
The screenshot shows a web application interface for searching EFA requests. The breadcrumb trail at the top indicates the path: SB Custom > SB SA Custom Menu > SB uAchieve EFA > SB uAchieve EFA Use > SB uAchieve EFA Search. The page title is 'CS - Campus Solutions/Student Info'. The search form is divided into four main sections: 'Student', 'Requestor', 'Requests', and 'Approver'. Each section contains specific search criteria fields. At the bottom of the form, there are 'Search' and 'Clear All' buttons.

Section	Field	Type
Student	ID	Text
	First Name	Text
	Last Name	Text
Requestor	Requestor ID	Text
	First Name	Text
	Last Name	Text
Requests	College	Text
	Department	Text
	Request Type	Dropdown
	Control Code	Dropdown
	From Date	Text
	To	Text
	Status	Dropdown
Approver	Approver ID	Text
	Approval Status	Dropdown

**For APPROVERS** - Once an EFA is requested from the PAWS report, a process must be ran to move the request into PeopleSoft. This process will run several times a day to push the information to your worklist.

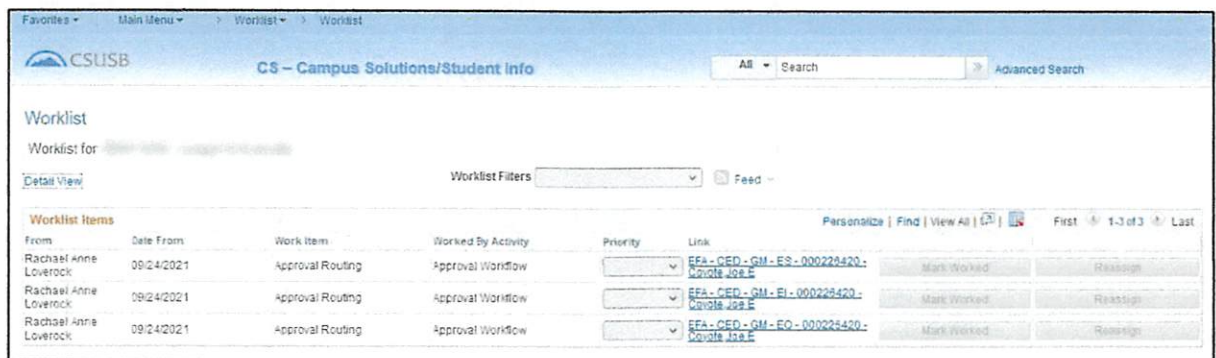
Once a request is picked up by the process, you will receive an email alerting you that there is an EFA request ready for your review. All routing from this point forward is in real-time.

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.



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

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



ID 000226420 Joe Coyote

Request Type GM

Sequence No. 1648012 DPROG CTEC-MA CTLCD ES Exception: Swap

Majors							
	Career	Career Nbr	Acad Prog	Acad Plan	Status	Plan Type	Description
1	Postbac	0	GRAD	CTECECDMAX	Active	Major	Career and Tech Education

**Swapping in**

ECTS5560 ECTS 5560

**Swapping out**

ECTS6350 Research in Career and Technical Education

**Into**

REQUIRED CORE COURSES  
MUST BE COMPLETED WITH A "C" OR BETTER

Using pseudo of CTECSEMMA-1 RNAME CTECSEMMA

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			
	Comment DateTime	Assigned Operator ID	Comment
1			

Approve Deny Add Comments

**:Pending**

Approvers

**Pending**

Joseph Scarcella  
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, 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.