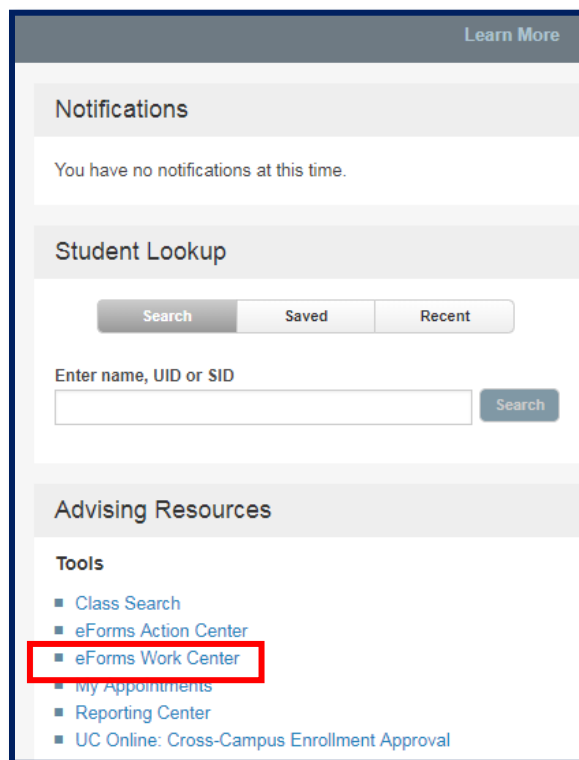


Academic Change of Program/Plan eForm – Streamline Approval Workflow

This job aid describes the routing/workflow of the Academic Change of Program/Plan eForm once it is submitted.

1. Log in to CalCentral using your CalNet ID and passphrase.
Select **eForms WorkCenter** from the list of **Advising Resources**.



2. Under the **Student** heading, click on **Add Academic Program/Plan eForm**.
Upon the Academic Program/Plan being submitted for approval the following can occur:



One Step Approval

IF Initiator is NOT same as Approver . . .

In this example Barbara Felkins (who is not a Letters & Science advisor) submitted the eForm.

Form routes to the advisor of the other college where the status is now pending.

The screenshot shows a web interface for 'Change Academic Plan Workflow'. At the top, a dropdown menu displays 'G3FORM_ID=204378:Pending'. Below this, a section titled 'Letters & Science Workflow' shows a 'Pending' status with a clock icon and the text 'Multiple Approvers' and 'New Major Roster + New Advr Delegate Roster'. A red box highlights this pending status area. Below the workflow section is a 'TRANSACTION / SIGNATURE LOG' table.

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time Elapsed
1 09/26/2018 12:30:18PM				Initiated	5327	Felkins, Barbara W	Submit	

IF Initiator is same as Approver . . .

In this example Frances Bright who is a Letters & Science advisor submitted the form.

Note: the Form Action is **“Authorize”** which means the request has been approved.

The screenshot shows a 'TRANSACTION / SIGNATURE LOG' table with the following data:

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time Elapsed
1 09/11/2018 10:08:39AM				Initiated	314442	Bright, Frances	Authorize	

The 'Form Action' cell 'Authorize' is highlighted with a red box.

Sequential Routing

IF Initiator is NOT same as Approver . . .

In this example Barbara Felkins who is not a Letters & Science advisor submitted the form.

The form is routed to the additional college for approval.

Change Academic Plan Workflow

G3FORM_ID=204377:Pending

Letters & Science Workflow

TRANSACTION / SIGNATURE LOG

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time Elapsed
1 09/26/2018 12:25:07PM				Initiated	5327	Felkins, Barbara W	Submit	

IF Initiator is same as Approver . . .

In this example Frances Bright, a Current Major Advisor for the student Letters & Science, advisor submitted the form.

Because she is the Current Major Advisor, **it skipped the approval step for 'Current Major Roster'**

Email Notifications: After the form is submitted an email notification is sent to the first step approvers (in this case New Major Advisor) and after they approve on the first step, an email will be sent to the third step approvers (in this case Letters & Science College Advisors) requesting for approval.

Note: In this case both the approval step (Current Major Advisor) is skipped and the email notification (Current Major Advisor) isn't sent.

Change Academic Plan Workflow

G3FORM_ID=184277:Pending

Letters & Science Workflow

TRANSACTION / SIGNATURE LOG

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time Elapsed
1 09/11/2018 10:31:53AM				Initiated	314442	Bright, Frances	Submit	

SIM Degree EGT Change Request

For SIM degree EGT change requests, the advisor of the home college is no longer required to add the advisor of the second college using the ad hoc routing functionality. The form automatically routes to both colleges sequentially for approval.

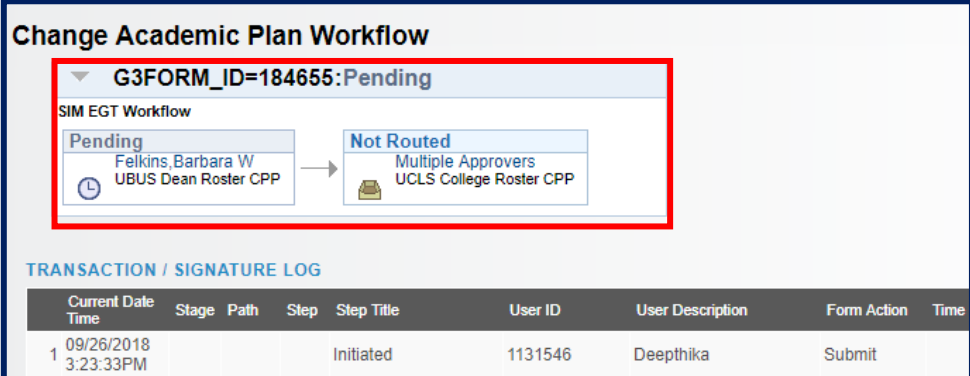
Order of colleges

1. Business
2. Chemistry
3. Engineering
4. Environmental Design
5. Letters and Science
6. Natural Resources

1. Standard Routing

Routes to both colleges, if Initiator is NOT same as Approver

In this example a student has a SIM degree in Letters & Science and Business. An advisor who is neither Letters & Science nor Business submitted the form, hence it requires approval from both colleges.



Change Academic Plan Workflow

G3FORM_ID=184655:Pending

SIM EGT Workflow

Pending
Felkins, Barbara W
UBUS Dean Roster CPP

Not Routed
Multiple Approvers
UCLS College Roster CPP

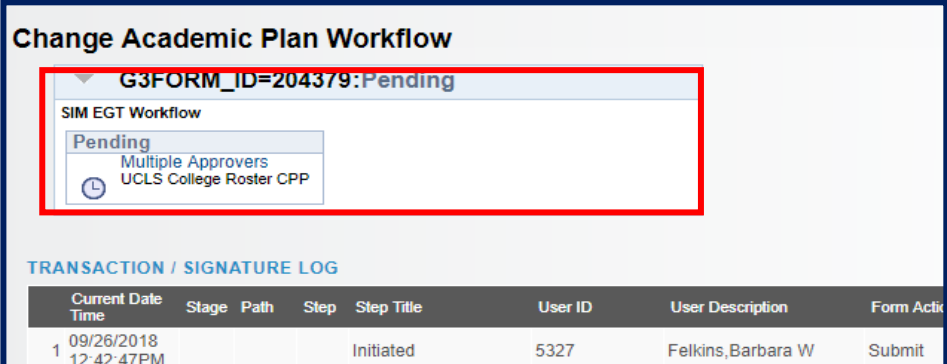
TRANSACTION / SIGNATURE LOG

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time
1 09/26/2018 3:23:33PM				Initiated	1131546	Deepthika	Submit	

2. Skip Approval Routing

Skip approvals happen if the Initiator is same as Approver

In this example the student has a SIM degree in Letters & Science and Business. Barbara Felkins who is a Business Dean submitted the form hence it skipped the approval from Business and only routed to Letters & Science.



Change Academic Plan Workflow

G3FORM_ID=204379:Pending

SIM EGT Workflow

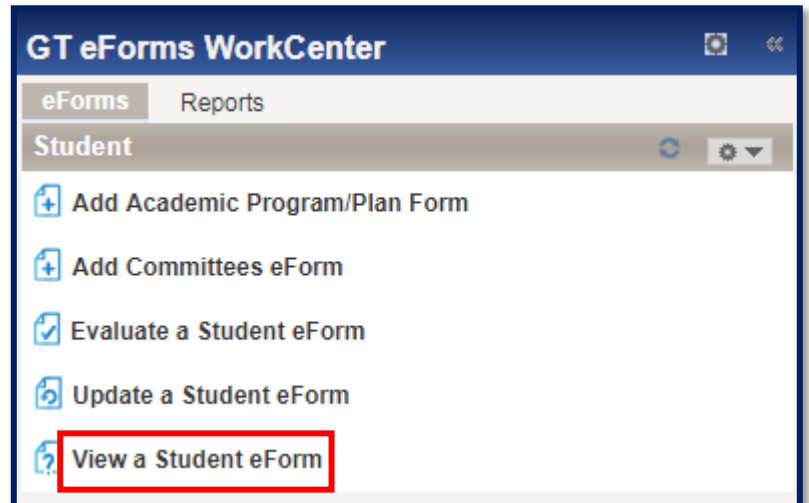
Pending
Multiple Approvers
UCLS College Roster CPP

TRANSACTION / SIGNATURE LOG

Current Date Time	Stage	Path	Step	Step Title	User ID	User Description	Form Action	Time
1 09/26/2018 12:42:47PM				Initiated	5327	Felkins, Barbara W	Submit	

Reviewing Prior eForms

The advisor can review submitted eforms from the link **'View a Student eForm'**



Support:

For questions or assistance, please contact SIS Production Support:

- Email: sishelp@berkeley.edu
- Call 510-664-9000 (press option 6)

For additional SIS resources, please visit:

- <http://sis.berkeley.edu/training>