Employees – PeopleSoft Student Administration System Security Authorization

Steps for Requestor

**Step 1:** Fill out the PowerForm Signer Information with the appropriate names and email addresses.

- **Access Requestor =** The user requesting Student Administration access.
- **Access Requestor Supervisor =** Supervisor of the requestor.
- **Division/College Authorization =** Administrative Services Manager (ASM) or Associate Dean.

*Note – This line MUST be signed by the Associate Dean if the user is requesting access to any advising information (e.g., grades, transcripts). The request will be denied if not signed by the Associate Dean.*

Click “Begin Signing” once all fields are filled out.

![PowerForm Signer Information](image)
**Step 2:** Click the checkbox to agree to use electronic records and signatures and then click “Continue”.

**Step 3:** Fill out all the required fields as indicated by the red boxes. Under Employee Status, a box should be checked to indicate if the requestor is Permanent Faculty/Staff or Temporary Faculty/Staff. Temporary Faculty/Staff should indicate an Appointment Start Date and Appointment End Date.

**Step 4:** Fill out the Job Requirements/Needs for Access sections to indicate what access is being requested. Examples of access granted by each Module can be found in the left column.

<table>
<thead>
<tr>
<th>MODULE</th>
<th>JOB REQUIREMENTS/NEEDS FOR ACCESS</th>
<th>SUPERVISOR COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CAMPUS COMMUNITY</strong></td>
<td>Biographic and demographic data, student contact information</td>
<td></td>
</tr>
<tr>
<td><strong>ADMISSIONS</strong></td>
<td>Application information, View Docs</td>
<td></td>
</tr>
<tr>
<td><strong>STUDENT RECORDS</strong></td>
<td>Enrollment, holds, class permissions</td>
<td></td>
</tr>
<tr>
<td><strong>ACADEMIC ADVISING</strong></td>
<td>Academic Requirements Report, Transfer Credit Summary, Unofficial Transcripts, Advisor News</td>
<td></td>
</tr>
<tr>
<td><strong>STUDENT FINANCIALS</strong></td>
<td>Customer Accounts, Charges, Payments</td>
<td></td>
</tr>
<tr>
<td><strong>FINANCIAL AID</strong></td>
<td>Federal and Department aid, scholarships</td>
<td></td>
</tr>
<tr>
<td><strong>REPORTS</strong></td>
<td>CS Link reports for academic advising</td>
<td></td>
</tr>
<tr>
<td><strong>OTHER</strong></td>
<td>All Access, Onbase</td>
<td></td>
</tr>
</tbody>
</table>
**Step 5 (optional):** If the requestor would like to attach any supplemental documents, such as a business justification, click the attachment button to upload a document. Otherwise, proceed to Step 6.

I have read and will comply with the provisions for security & confidentiality of data as stated in the “CSULB Student Confidentiality/Security Agreement”; that has been signed and included with this form. I further acknowledge that I have read and Records Procedures” which outlines the campus guidelines for compliance with the Family Educational Rights and Privacy Act (FERPA) regulations.

**Step 6:** Click “Sign” to electronically sign the form. If this is your first time signing a DocuSign form, you will have the option to adopt a signature style or draw your own signature. Click “Adopt and Sign” when done.
Step 7: Click “Finish” when done signing.

Step 8 (optional): If desired, download or print a copy of the form for your records. Otherwise, click “Close”.

The form will now route to the supervisor indicated on the PowerForm for their signature.

Steps for Supervisor

Step 1: The supervisor indicated on the PowerForm will receive an email notification advising a document requires their signature. The email subject line will have the name of the person the request is for. Click “Review Document” in the email.
**Step 2**: Click the checkbox to agree to use electronic records and signatures and then click “Continue”.

**Step 3**: Review the request made by the requestor for accuracy. If you would like to add some additional notes or clarification (optional), please make these notes in the area labeled “Supervisor Comments”.
**Step 4 (optional):** If you would like to attach any supplemental documents, such as a business justification, click the attachment button to upload a document. Otherwise, proceed to Step 5.

**To include a student assistant position description or provide business justification for this request, please add attachments here.**

I have read and will comply with the provisions for security & confidentiality of data as stated in the “CSULB Student Confidentiality/Security Agreement”; that has been signed and included with this form. I further acknowledge that I have read and understand the “Records Procedures” which outlines the campus guidelines for compliance with the Family Educational Rights and Privacy Act (FERPA).
Step 5: Click “Sign” to electronically sign the form. If this is your first time signing a DocuSign form, you will have the option to adopt a signature style or draw your own signature. Click “Adopt and Sign” when done.

Step 6: Click “Finish” when done signing.

Step 7 (optional): If desired, download or print a copy of the form for your records. Otherwise, click “Close”.

The form will now route to the Division/College Authorization indicated on the PowerForm for their signature.
Steps for Division/College Authorization

**Step 1:** Once the requestor’s supervisor has finished signing the form, the Division/College Authorization indicated on the PowerForm will receive an email notification advising a document requires their signature. The email subject line will have the name of the person the request is for. Click “Review Document” in the email.

**Step 2:** Click checkbox to agree to use electronic records and signatures and then click “Continue”.

![Review Document Image]

[Image of DocuSign email and DocuSign eSignature interface]
**Step 3 (optional):** If you would like to attach any supplemental documents, such as a business justification, click the attachment button to upload a document. Otherwise, proceed to Step 4.

I have read and will comply with the provisions for security & confidentiality of data as stated in the “CSULB Student Data Use and Request for Records Procedures” which outlines the campus guidelines for compliance with the Family Educational Rights and Privacy Act (FERPA).

**Step 4:** Click “Sign” to electronically sign the form. If this is your first time signing a DocuSign form, you will have the option to adopt a signature style or draw your own signature. Click “Adopt and Sign” when done.

**Step 5:** Click “Finish” when done signing.

The form is now complete and will route to Student Administration for processing.