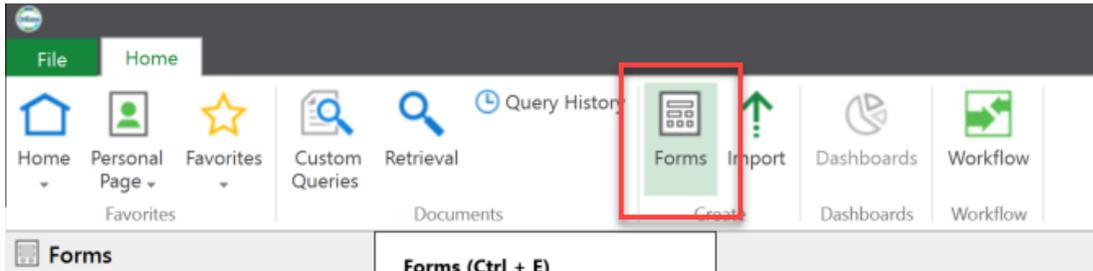


## EAB Access - CARS Request Process (Advisor Role)

**Please note:** CARS requested is only available to managers who have attended the CARS training hosted by IRT and have direct reports. If you are unable to locate the CARS Request form please refer to your department business analyst.

A. Locate the Forms Icon once logged in OnBase



- B. Select CMS CARS Request and input the EMPLID of the staff needing access
- All other info will automatically populate once the EMPLID is added to the form
  - Here you will have the opportunity to verify that the Data Security and FERPA Training Status is set to "COMPLETED"

A screenshot of the 'CMS CARS Request' form in OnBase. The form is titled 'SACRAMENTO STATE CMS CARS Request' and has tabs for 'User & Approval Info', 'CFS Role Request', 'SA Role Request', and 'HR Role Request'. The 'User Identification / Status' section contains an 'EmplID' field, which is highlighted with a red box and a red arrow pointing to it. A red circle with the number '2' is next to the arrow. Below the 'EmplID' field is a 'Campus Email' field. To the right of these fields is a 'Data Security and FERPA Training Status' field. Below this is a 'Note' section with text: 'Status may not be current. User may login to MySacState, click on the Employee Center to complete the training.' and a 'User Acknowledgement' section with a link to 'CSU Access and Compliance Agreement'. The 'User Information' section includes fields for 'First Name', 'Middle Name', 'Primary Dept ID', and 'Job Title'. The 'Approver's Information' section includes fields for 'Supervisor Information' (First Name, Middle Name, Last Name, Department ID) and 'Preparer's Information' (SacLink ID, Campus Email, Job Title, Status Updates). A sidebar on the left shows a list of search results, with 'IS - Information Systems' and 'CMS CARS Request' highlighted in yellow. A red arrow points from the sidebar to the 'EmplID' field.

- C. 1. Select the SA Role Request Tab from the top of the form
2. Locate the Low Risk Section and select Add
3. Select Add again from the drop down menu
4. Locate the *Advising Inquire* Role Type from the drop down menu

CMS CARS Request

The screenshot shows the 'CMS CARS Request' interface. At the top, there are four tabs: 'User & Approval Info', 'CFS Role Request', 'SA Role Request', and 'All Role Request'. A red arrow labeled '1' points to the 'SA Role Request' tab. Below the tabs is a 'Low Risk' section. Under 'Current Roles', there is a search bar and a link: 'Role Descriptions found here: https://www.csus.edu/irt/reports-dashboards/peoplesoft/cms-and-cfs-access-roles.html'. Below this is the 'SA Low Risk Role Request' section. It contains a table with two columns: 'SA Low Risk Role Action' and 'SA Low Risk Role Type'. In the 'SA Low Risk Role Action' column, there is a dropdown menu with 'ADD' selected, highlighted by a red box and a red arrow labeled '3'. In the 'SA Low Risk Role Type' column, there is a dropdown menu with 'ADVISING INQUIRE' selected, highlighted by a red box and a red arrow labeled '4'. There is also an 'Add' button on the right side of the table, highlighted by a red arrow labeled '2'. Below the table is a section for 'Other Roles / Special Instructions'.

- D. Scroll down and select **Submit** to initiate the approval process. Note that the employee will receive email updates through each stage of the process as the Hiring Manager, Data Owner, and IRT approve and complete the request.
- E. Once the staff member has been successfully added to the SAC\_SA\_ADVISOR group via this request, EAB will update overnight granting the staff member the Advisor access in the platform.

If you have not received EAB training or are unsure which level of access to request for a staff member please contact the EAB Support Team via: [eab.support@csus.edu](mailto:eab.support@csus.edu)