APPROVING A TUITION EXEMPTION REQUEST

LSU BPM User Guide

ABSTRACT
This user guide provides an in-depth look at the process of approving Tuition Exemption Request forms that were initiated by LSU employees to obtain tuition exemption for various LSU courses.

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What is the Tuition Exemption Request procedure?

It is a Business Process Management procedure developed by Financial Systems Services to streamline tuition exemption requests by utilizing an automated, electronic process. This web-based process will be accessed by various employees of the LSU community seeking tuition exemption and will include automatic routing through the appropriate approval processes as prescribed by University policies. Tuition Exemption can be initiated by accessing the Tuition Exemption Request link under the Employee Resources heading on the left-hand side of the myLSU desktop.

Initial Email Notification for Approvers

Once a Tuition Exemption Request is submitted for approval the first approver (the Supervisor) will receive an email informing them that there is a task that requires their attention. The subject of the email will display the Requestor’s name and the requested semester. The first section of the body of the approver email will contain the details of the request including the Current Stage in which the request resides and the Request Reference ID. The Dean/Department Head’s email will include an extra line that lists the approving supervisor.

The second section of the email consists of a list of the classes for which the exemption was requested.

The last section of the email provides a link that will open the request through the approver’s myLSU desktop, directions on using the Auto Approve feature, and an email link to send tuition exemption questions.

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**Figure 1: Tuition Exemption link in myLSU**

**Figure 2: Email Notification for Approvers**
Approver Options for All Approvers

Each approver that receives an approval request will have two approval methods available. As stated above, the email notification sent to the approver includes a link that will open a full request approval form through their PAWS desktop that allows approvals and/or disapprovals to be made directly to the request. Another option available to approvers is the Auto Approve feature. These two options are discussed in more detail below.

Approving through myLSU

There are two ways approvers can access the request form through PAWS in order to submit their approvals and/or disapprovals. The first way is to select the link in the approver email notification found in the sentence “Please click here to process this request.” which you can see in Figure 2 above. The second way is to select the particular request off of the To Do List in the LSU BPM portal (Please see the LSU BPM Intro on the Financial Systems Services website to learn more about the LSU BPM portal).

Supervisor Approval Form

a. Request Information Tab: Once the link within the email is clicked or the request is selected from the To Do List in the BPM Portal, a form will open to the first tab which is titled “Request Information”. If any comments were added to the request there will be a message in red font stating “Please review the comments attached to this request.” The comments can be viewed by clicking on the Comments tab at the top of the request approver form.

The Requestor Information section contains the requestor’s basic information, which is populated automatically and cannot be edited by the user.
The Semester/Work Information section displays information pertaining to the classes taken that was entered by the Requestor when the request was initiated.

The Requested Course(s) section lists the classes and class information in which the Requestor is enrolled for the selected semester.

If a Supervisor is approving the form the next person in the approval process, the Dean/Department Head, is shown in the bottom section labeled “Dean/Department Head”. If the Dean/Department Head is approving the form then the “Dean/Department Head” box will not appear on the form, but the Supervisor that approved the request can be seen by clicking on the “Audit Information” tab at the top of the page.

Approving, denying, returning the form to the Requestor, and adding comments can all be accomplished by utilizing the buttons at the bottom of the page. There is also a status bar below the buttons that shows where in the approval process the request exists.

**b. Comments Tab** - This page is designed for approvers to review any comments that have been added to the request throughout the entire process and to add any comments of their own by adding the comment in the “Add Process Comment” box and clicking “Save Comment” next to the green plus sign. Each comment entry is logged with the name and role of the individual that submitted the comment as well as the date and time of when the comment was entered.

![Figure 5: Tuition Exemption Approver Form – Comments Tab](image)

**b. Audit Information Tab** - The Audit Information page is designed to provide various audit trail detail that will help approvers determine the current status and past progress of the request throughout the entire request and approval process. The Audit Information page includes three sections:

1. **General Process Information** - shows information such as the request ID, who created the request, when they created it, its current stage, and how long it has been in the current stage.
2. **Awaiting Approval From** - this section shows who currently has the request on their To Do list. All individuals needing to approve the request for various reasons (i.e. if they’re the supervisor of the user, the department head/dean of the department, etc.) will have the request on their To Do list. *(Note: All individuals that have*
approved the request as well as the Requestor will have the request on their Watch List in the LSU BPM portal in myLSU and will be able to watch the request throughout the approval process.)

3. Current Status – this section will show all individuals that approved or disapproved the request at a particular stage, as well as the time that the request was approved or disapproved.

![Image](image_url)

**Figure 6: Tuition Exemption Approver Form – Audit Information Tab**

**Action Options for Approvers**

The request will have three buttons at the bottom of the page for all approvers: Approve, Deny, Return to User, and Add Comment.

![Image](image_url)

**Figure 7: Action Buttons on Tuition Exemption Approver Form**

When the approver clicks “Approve” there will be an “Approval Certification” pop-up box requesting the approver to certify that they have reviewed all information pertaining to the request to include alternate work schedules and justifications.

![Image](image_url)

**Figure 8: Approval Certification**

Clicking “OK” on the “Approval Certification” pop-up box will complete the approval, and the approver will see the “Approval Submitted” confirmation box prior to the form closing.

![Image](image_url)

**Figure 9: Approval Submission Confirmation**
When the approver clicks “Deny” or “Return to User” they will be prompted to enter an explanation comment before continuing.

Clicking “Submit” will complete the deny or return to user action, and a confirmation box will confirm your action once clicked. Clicking the “Cancel” button will return the approver to the previous view of the form.

**Approving via the Auto Approve Feature**

For added convenience, approvers can approve or disapprove requests via email from any computer or mobile device (i.e. Phones, tablets, etc.). As the sample email that is provided in Figure 2 above explains, the Auto Approve feature can be used by simply reviewing all of the details of the request provided within the body of the email including the actual items being requested and comments made on the request and then replying with only the word Approve or only the word Disapprove. The approver must ensure that the “reply with history” feature is not turned off when replying with the approval response, because the system must read the original email sent in order to have a successful approval.

A reply email will be immediately sent to the approver confirming that the response was received by the system and whether or not it was successful. If approvers reply with words that are not recognized the system will not process the response. Please see Figures 7 and 8 below for examples of a successful and unsuccessful email confirmation reply.
Once a successful email is received the system will process the email and automatically update the tuition exemption request with the approver’s decision.

**Task Previously Actioned**

If an approver clicks on the link in the email (see Figure 2 above) and tries to access a task that was previously actioned a message will be displayed directing the user to the Watch List in the LSU BPM Portal. Once the approver clicks “OK”, the browser window/tab will close.

Similarly, if an approver tries to auto-approve via email reply a task already completed, they will receive a friendly email stating that the ‘server could not find the worklist item’. No further action needs to be taken because the request has already been approved or disapproved.
Subsequent Request Tracking

The Requestors and Approvers of tuition exemption requests that have been submitted can track the progress of any requests by visiting their LSU BPM Portal by clicking on “LSU BPM” after logging in to myLSU.

Once in the LSU BPM Portal, you will notice two main sections: “To Do List” and “Watch List”. The To do List contains all requests for which the person visiting the portal needs to action with either an approval or disapproval decision. The section contains the Process Name of the request, the Stage name for the stage in which the request is sitting, and the Start Date the request was initiated. There is also a link in underlined blue font named “Process Request” which, once clicked, allows users to view the request in order to approve or disapprove it.

The second main section is entitled “Watch List” and contains all requests for which the person visiting the portal has either originally initiated or previously approved. These requests can be clicked on anywhere in the row in order to view their progress if still in process or to view the final details if the request is completed or cancelled. Requests will remain on the Watch List for 60 days after the request is completed or cancelled and will then subsequently be archived and removed from the list.

See the LSU BPM Introduction link on the FSS website to learn more about the LSU BPM Portal.