

Adding a Plan and/or Sub-Plan to a Student Record

OBJECTIVE: This document explains the steps taken to add or change a plan or sub-plan to a student record.

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[LESSON 2: ADDING A SUB-PLAN PG. 7](#)

NEED ADDITIONAL INFORMATION?

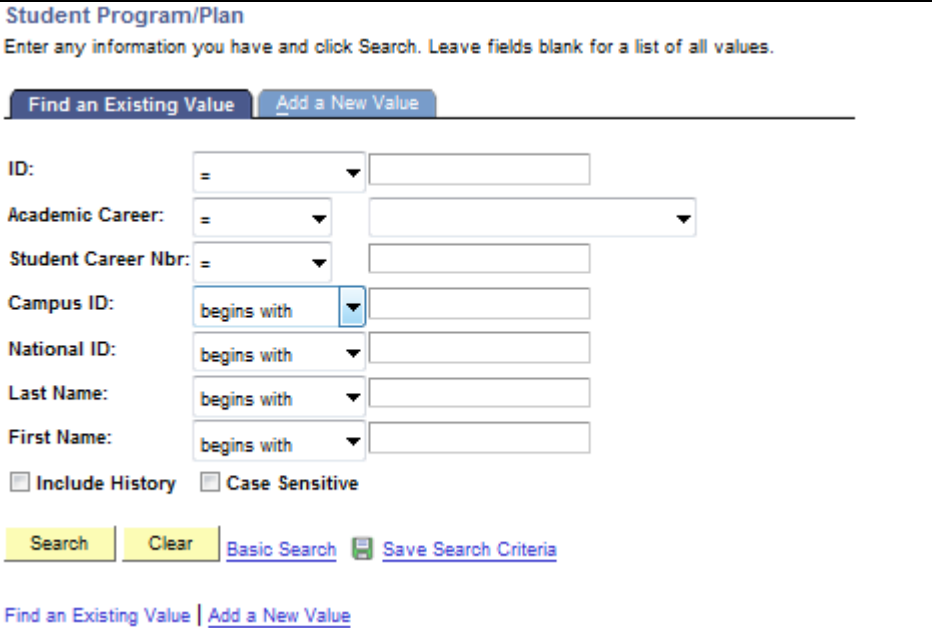
For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/cms/contact.shtml> to locate the **Student Records Functional Lead** under Student Administration.

Student Records

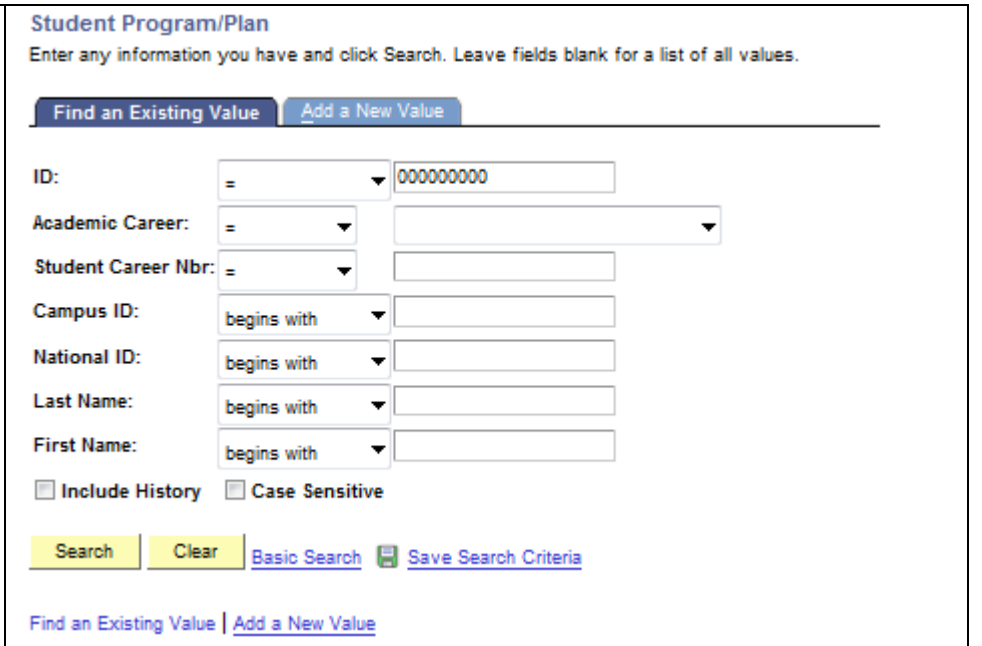

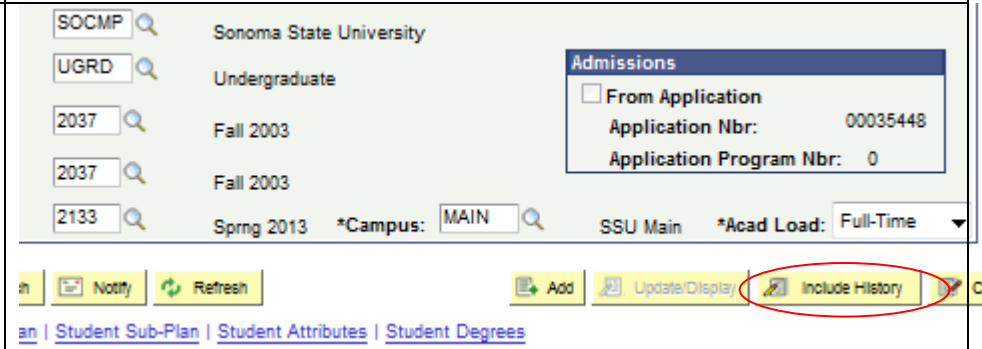


Lesson 1: Adding or Changing a Plan

Navigation: Records and Enrollment > Career and Program Information > Student Program/Plan

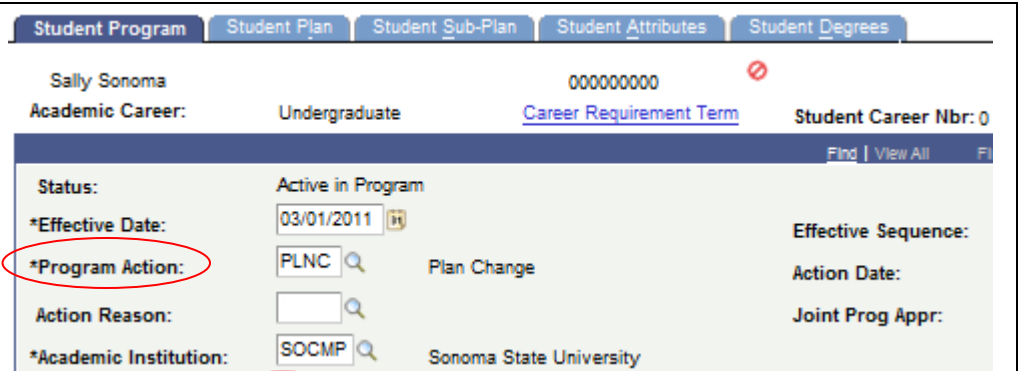
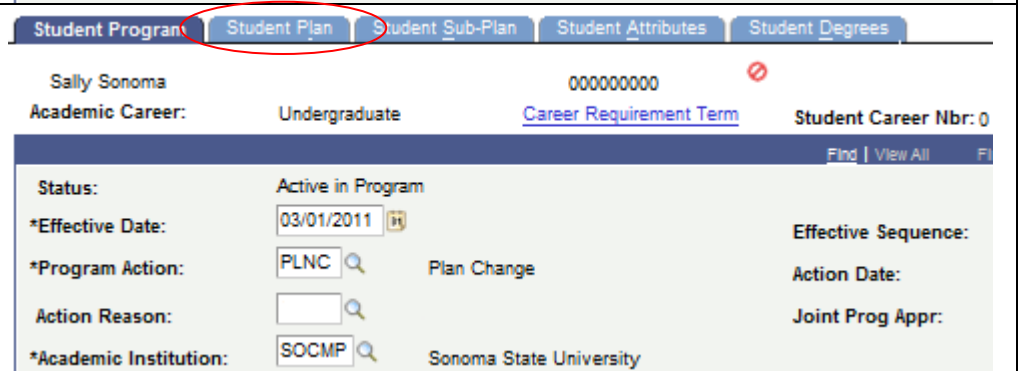
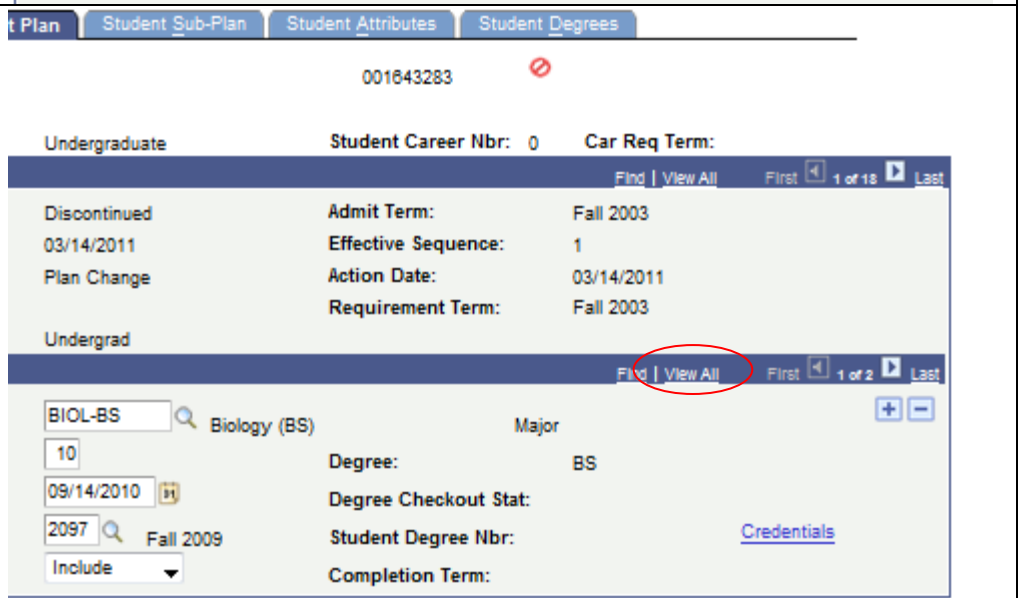
INTRODUCTION: There may be times when a student needs to have a major changed or a minor added. This action requires an addition or change of the student's plan. The following table will outline the steps necessary to add or change a plan on a student record.

Step	Action	Screenshot
1	<p>Navigate to the Student and Program Plan page using the navigation:</p> <p>Records and Enrollment> Career and Program Information> Student Program/Plan</p>	

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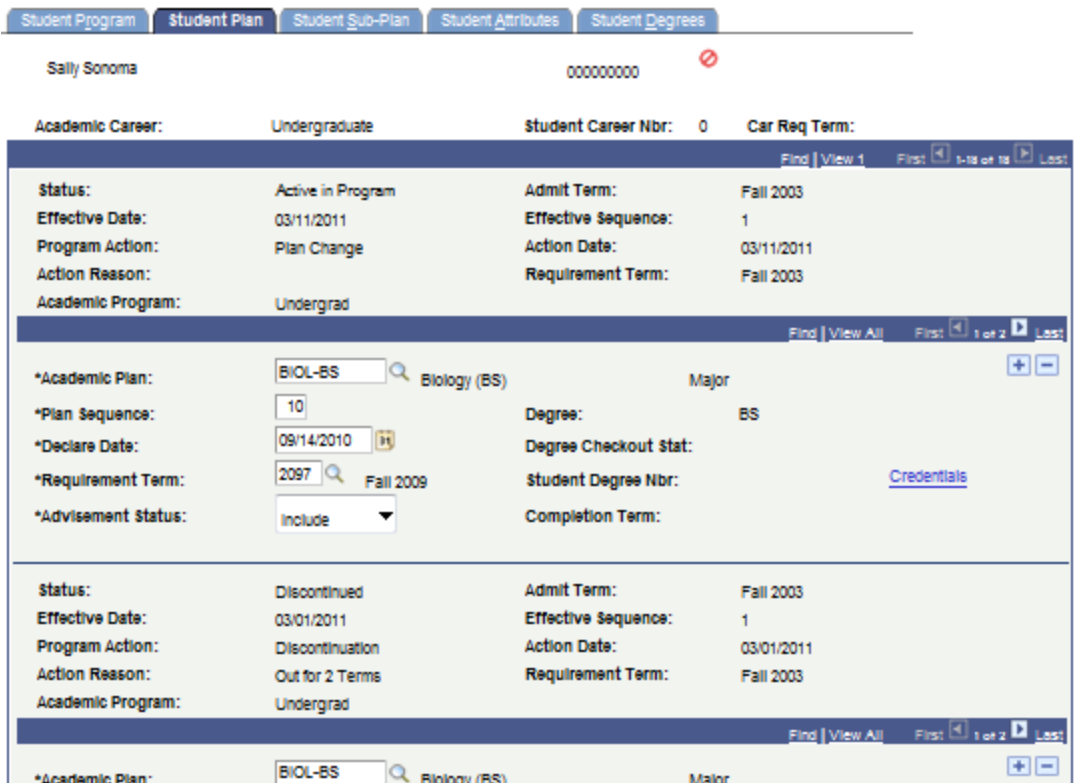

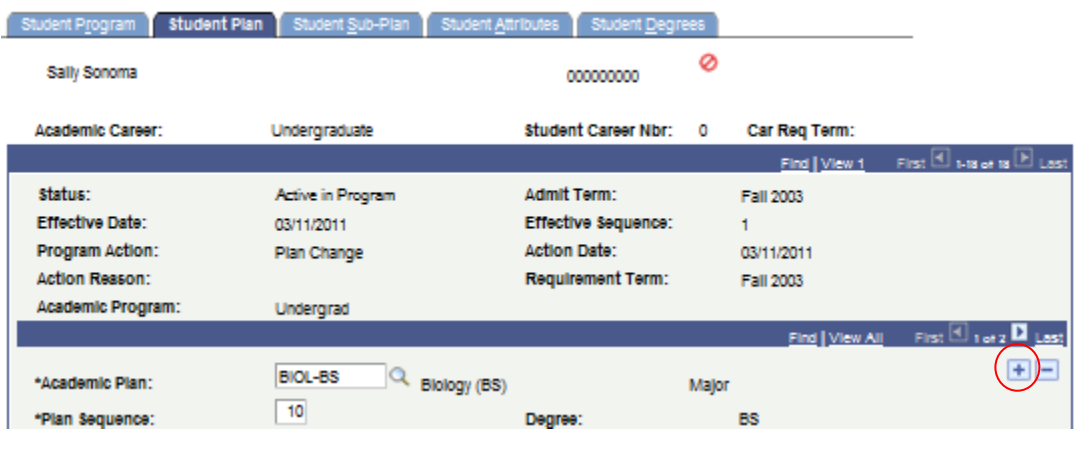
<p>2</p>	<p>Enter the necessary information to look up the student who needs a plan added or changed.</p>	
<p>3</p>	<p>Click on the Include History button.</p>  <p>NOTE: This step must be completed prior to adding or changing any student plan.</p>	
<p>4</p>	<p>All of the student's current and historical program information will be displayed. Click on the Plus button to add another Program row. </p>	

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<p>5</p> <p>Enter the program action of PLNC into the <i>Program Action</i> box. This signifies a plan change.</p>	 <p>The screenshot shows the 'Student Program' tab selected. The student's name is Sally Sonoma, ID 000000000. The academic career is Undergraduate. The status is 'Active in Program'. The effective date is 03/01/2011. The program action is 'PLNC' (Plan Change). The academic institution is Sonoma State University.</p>
<p>6</p> <p>Click on the Student Plan tab.</p>	 <p>The screenshot shows the 'Student Plan' tab selected. The student's name is Sally Sonoma, ID 000000000. The academic career is Undergraduate. The status is 'Active in Program'. The effective date is 03/01/2011. The program action is 'PLNC' (Plan Change). The academic institution is Sonoma State University.</p>
<p>7</p> <p>Click on View All to see all of the student's plan history. This ensures that the correct plan is changed or added.</p>	 <p>The screenshot shows the 'Student Sub-Plan' tab selected. The student ID is 001643283. The academic career is Undergraduate. The status is 'Discontinued'. The admit term is Fall 2003, effective date is 03/14/2011, and the action is 'Plan Change'. The requirement term is Fall 2003. The 'View All' button is highlighted in the table header. Below the table, the degree details are shown: BIOL-BS Biology (BS) Major, Degree BS, Degree Checkout Stat, Student Degree Nbr, and Completion Term.</p>


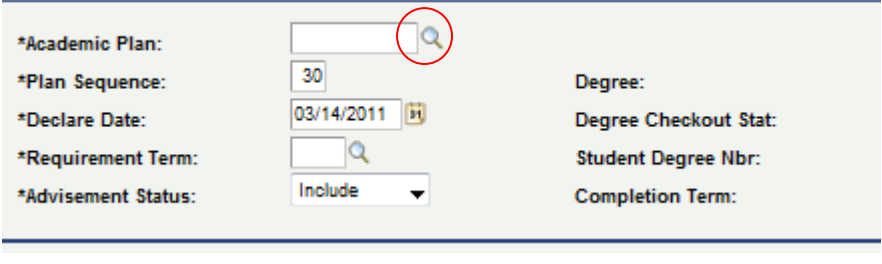
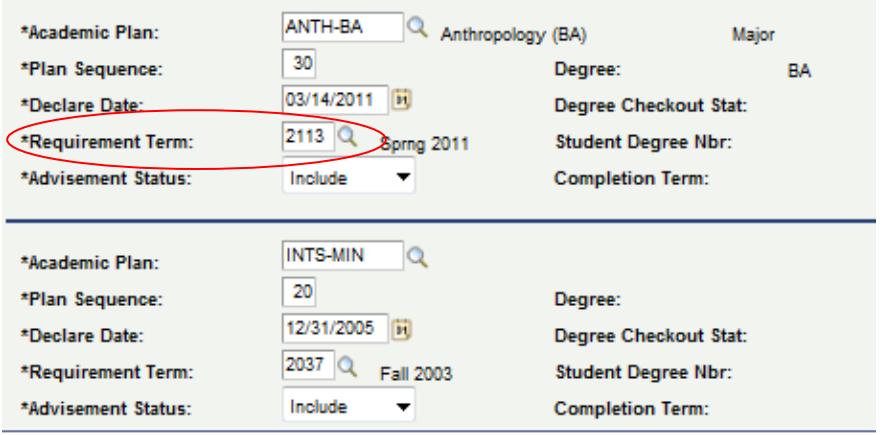
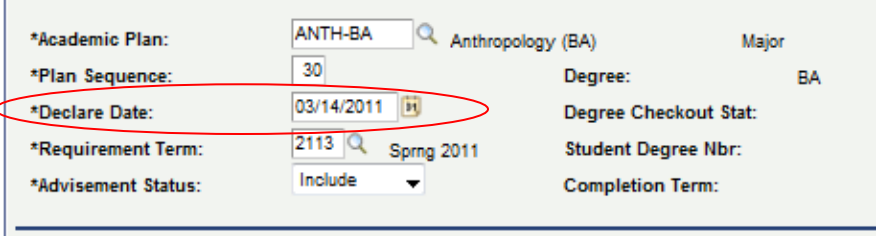
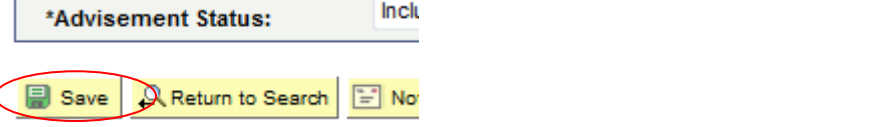
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Student Records

<p>8</p>	<p>Determine the plan that requires the addition or change.</p> <table border="1" data-bbox="151 470 422 951"> <thead> <tr> <th data-bbox="151 470 305 506">If</th> <th data-bbox="305 470 422 506">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="151 506 305 730">A plan needs to be added (major or minor)...</td> <td data-bbox="305 506 422 730">Go to step 9.</td> </tr> <tr> <td data-bbox="151 730 305 951">A plan needs to be changed (major or minor)...</td> <td data-bbox="305 730 422 951">Go to step 10.</td> </tr> </tbody> </table>	If	Then	A plan needs to be added (major or minor)...	Go to step 9.	A plan needs to be changed (major or minor)...	Go to step 10.	
If	Then							
A plan needs to be added (major or minor)...	Go to step 9.							
A plan needs to be changed (major or minor)...	Go to step 10.							
<p>9</p>	<p>Click on the Plus button to add a new row to the existing plan.</p> 							

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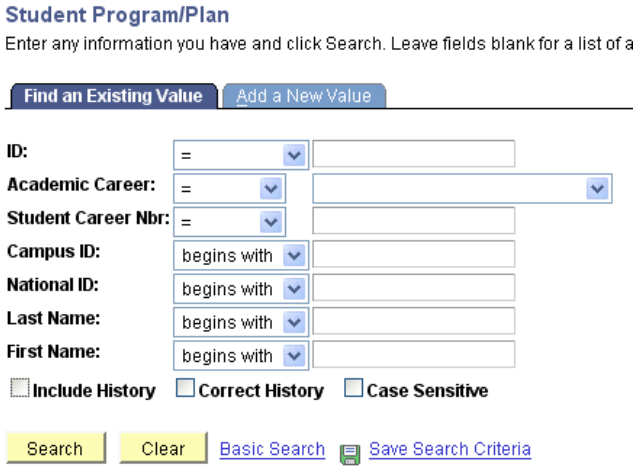
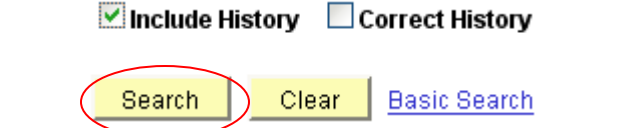

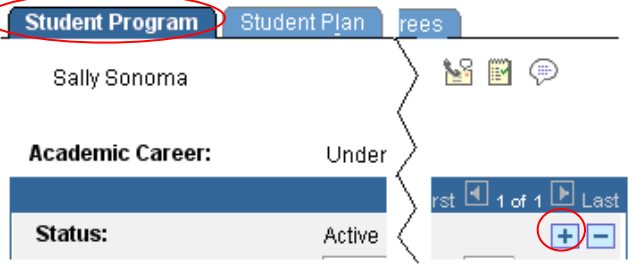
Student Records

10	<p>Click on the Magnifying Glass icon to search for the appropriate plan to add/change for the student record.  Select the appropriate plan from the list.</p>							
11	<table border="1"> <thead> <tr> <th data-bbox="199 659 415 695">If</th> <th data-bbox="415 659 631 695">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="199 695 415 919">The major is declared in the same term as the default term...</td> <td data-bbox="415 695 631 919">Go to step 12.</td> </tr> <tr> <td data-bbox="199 919 415 1144">The major is declared in a term that is later than the default term...</td> <td data-bbox="415 919 631 1144">Update the Requirement Term to the declared term.</td> </tr> </tbody> </table>	If	Then	The major is declared in the same term as the default term...	Go to step 12.	The major is declared in a term that is later than the default term...	Update the Requirement Term to the declared term.	 <p>NOTE: The requirement term must be the default value or later unless otherwise approved by the Dept.</p>
If	Then							
The major is declared in the same term as the default term...	Go to step 12.							
The major is declared in a term that is later than the default term...	Update the Requirement Term to the declared term.							
12	<p>If appropriate change the declare date to reflect the student's request.</p>							
13	<p>Click Save to complete the changes.</p>							



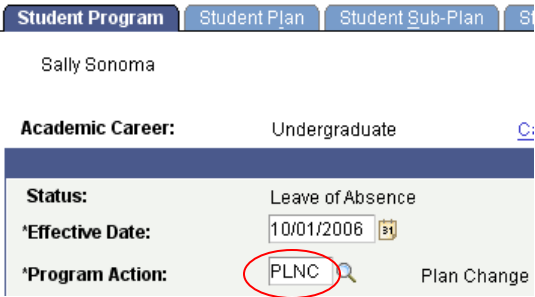

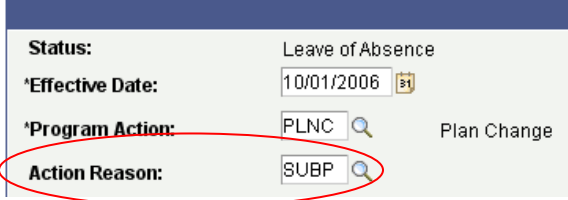
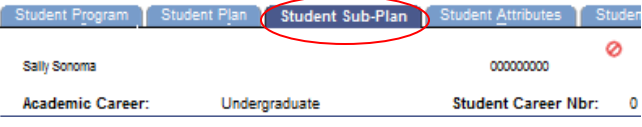


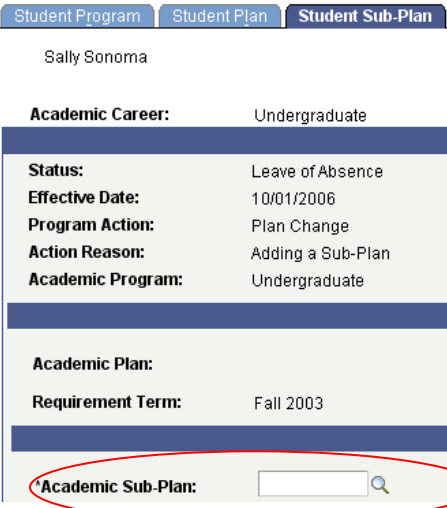
Lesson 2: Adding a Sub-Plan

Navigation: Records and Enrollment > Career and Program Information > Student Program/Plan









INTRODUCTION: The following table will outline the steps necessary to add a sub-plan to a student record.

Step	Action	Screenshot
1	Locate the student by entering their name and/or student ID.	
2	Check the <i>Include History</i> box and click Search .	
3	Add a row on the Student Program page by clicking on the “plus” button. 	

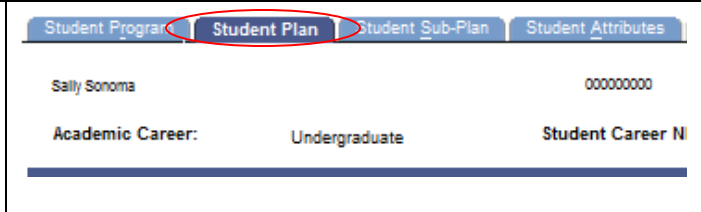
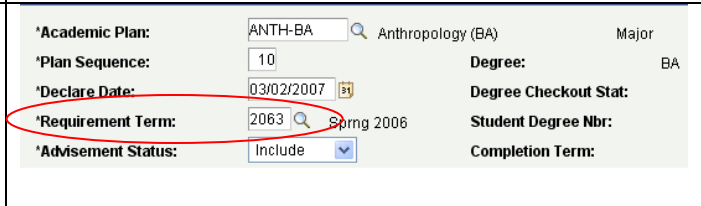
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<p>4</p>	<p>In the Program Action box enter “PLNC” (Plan Change for the Program Action)</p> <p>*Program Action: <input type="text" value="PLNC"/> </p> <p>NOTE: The magnifying glass (Lookup Button) next to any box will allow you to view available entries. </p>	
<p>5</p>	<p>In the Action Reason box enter “SUBP” (Adding a Sub-Plan)</p> <p>Action Reason: <input type="text" value="SUBP"/> </p>	
<p>6</p>	<p>Click on the Student Sub-Plan tab at the top of the screen.</p> <p>Student Sub-Plan</p>	
<p>7</p>	<p>Click on View All to view all of the student’s academic plans.</p>	
<p>8</p>	<p>Use the Lookup button to display available sub-plan options in the Academic Sub-Plan box. Select the appropriate sub-plan for the student.</p> <p>*Academic Sub-Plan: <input type="text"/> </p> <p>NOTE: Make sure you are on the correct Academic Plan row prior to assigning any Sub-Plans.</p>	

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<p>9</p>	<p>Enter the appropriate date in the Declare Date field.</p> <p>*Declare Date: <input type="text" value="12/31/2005"/> </p> <table border="1"> <thead> <tr> <th data-bbox="203 520 522 556">If</th> <th data-bbox="522 520 834 556">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="203 556 522 709">The student is declaring the plan and the sub-plan on the same day...</td> <td data-bbox="522 556 834 709">Leave the defaulted Declare Date.</td> </tr> <tr> <td data-bbox="203 709 522 892">The student is declaring a sub-plan after the declaration of a plan...</td> <td data-bbox="522 709 834 892">Update the Declare Date field with the date on which the sub-plan is being declared.</td> </tr> </tbody> </table>	If	Then	The student is declaring the plan and the sub-plan on the same day...	Leave the defaulted Declare Date .	The student is declaring a sub-plan after the declaration of a plan...	Update the Declare Date field with the date on which the sub-plan is being declared.	<p>*Academic Sub-Plan: <input type="text" value="ECON BUSEC"/>  Business Economics</p> <p>Academic Sub-Plan Type: Concentration</p> <p>*Declare Date: <input type="text" value="01/02/2003"/> </p> <p>*Requirement Term: <input type="text" value="2037"/>  Fall 2003</p>
If	Then							
The student is declaring the plan and the sub-plan on the same day...	Leave the defaulted Declare Date .							
The student is declaring a sub-plan after the declaration of a plan...	Update the Declare Date field with the date on which the sub-plan is being declared.							
<p>10</p>	<p>If necessary update the Requirement Term (catalog year). This will default to the student's program admit term.</p> <p>*Requirement Term: <input type="text" value="2087"/>  Fall 2008</p> <table border="1"> <thead> <tr> <th data-bbox="203 1129 522 1165">If</th> <th data-bbox="522 1129 834 1165">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="203 1165 522 1390">The student's sub-plan existed in their original catalog year and they want to remain in that catalog year...</td> <td data-bbox="522 1165 834 1390">Allow the Requirement Term to default to the program admit term. Go to step 13.</td> </tr> <tr> <td data-bbox="203 1390 522 1648">The student has a sub-plan that is newer than their original catalog year or they would like to switch to the current catalog year...</td> <td data-bbox="522 1390 834 1648">Update the Requirement Term with the catalog year necessary to determine the sub-plan courses. Go to step 11.</td> </tr> </tbody> </table>	If	Then	The student's sub-plan existed in their original catalog year and they want to remain in that catalog year...	Allow the Requirement Term to default to the program admit term. Go to step 13.	The student has a sub-plan that is newer than their original catalog year or they would like to switch to the current catalog year...	Update the Requirement Term with the catalog year necessary to determine the sub-plan courses. Go to step 11.	<p>*Academic Sub-Plan: <input type="text" value="ECON BUSEC"/>  Business Economics</p> <p>Academic Sub-Plan Type: Concentration</p> <p>*Declare Date: <input type="text" value="01/02/2003"/> </p> <p>*Requirement Term: <input type="text" value="2037"/>  Fall 2003</p>
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11	Return to the Student Plan tab to update the Plan Requirement Term .	
12	Update the Requirement Term to reflect the updated term in the sub-plan.	
13	Click on the Save button to save your changes. 