

Adding a Sub-Plan to a Student Record

OBJECTIVE:

To explain steps taken to add a sub-plan to a student record.

CONTENTS:

LESSON 1: ADDING A SUB-PLAN2
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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 **Academic Advising Functional Lead** under Student Administration.

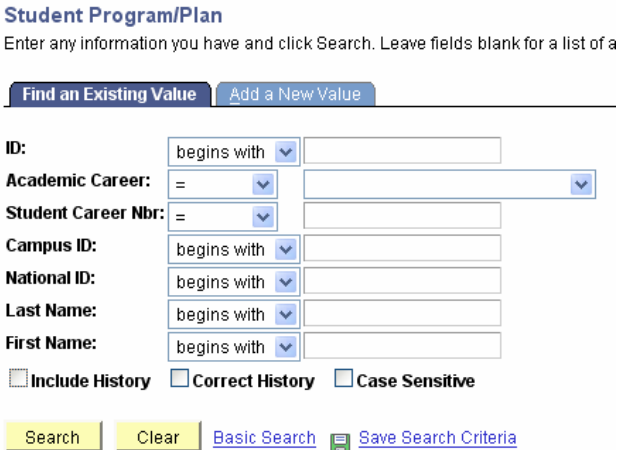
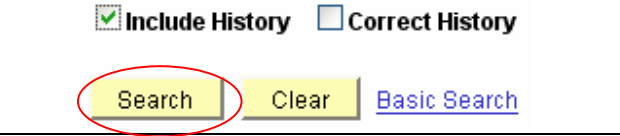

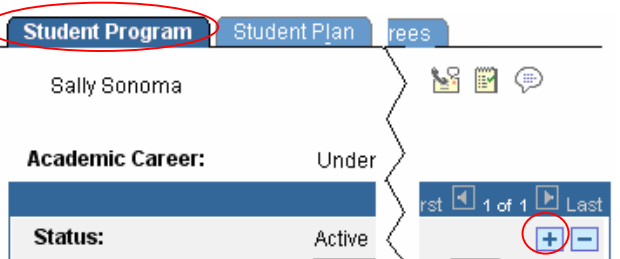
Academic Advising

STAFF - <http://www.sonoma.edu/cms/documentation/>
Last Update: 6/13/08



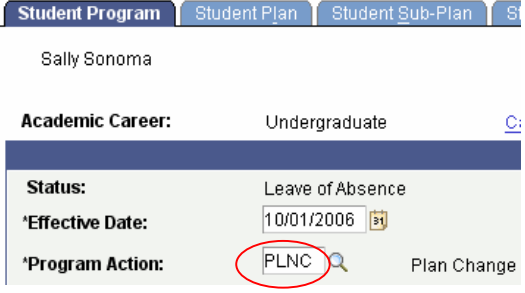

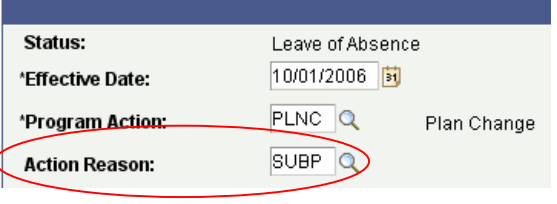
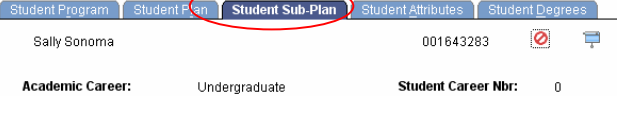


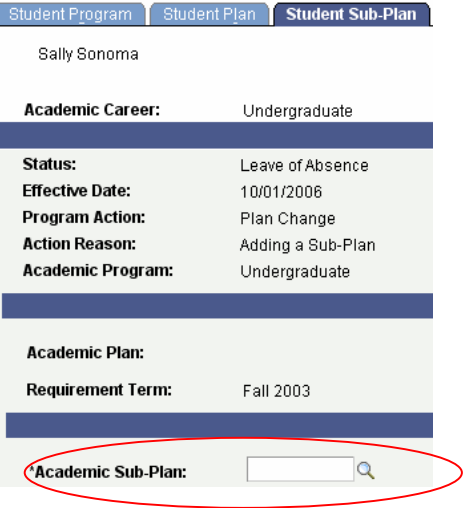
Lesson 1:

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. 	

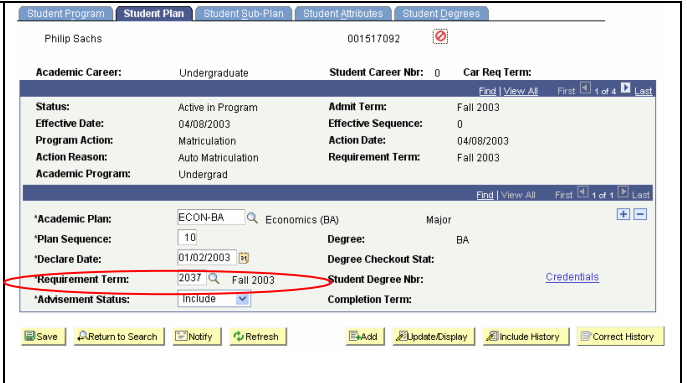
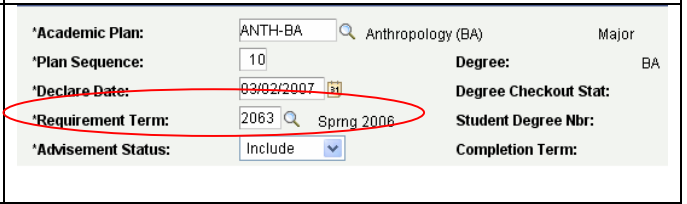
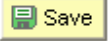

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<p>4</p>	<p>In the Program Action box enter “PLNC” (Plan Change for the Program Action)</p> <p>*Program Action: <input type="text" value="PLNC"/> </p> <p>NOTE: The magnifying glass (Lookup Button) next to any box will allow you to view available entries. </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>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The student is declaring the plan and the sub-plan on the same day...</td> <td>Leave the defaulted Declare Date.</td> </tr> <tr> <td>The student is declaring a sub-plan after the declaration of a plan...</td> <td>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>
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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>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The student's sub-plan existed in their original catalog year and they want to remain in that catalog year...</td> <td>Allow the Requirement Term to default to the program admit term. Go to step 13.</td> </tr> <tr> <td>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>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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<p>11</p> <p>Return to the Student Plan tab to update the Plan Requirement Term.</p>		 <p>Philip Sachs 001517092</p> <p>Academic Career: Undergraduate Student Career Nbr: 0 Car Req Term:</p> <p>Status: Active in Program Admit Term: Fall 2003 Effective Date: 04/08/2003 Effective Sequence: 0 Program Action: Matriculation Action Date: 04/08/2003 Action Reason: Auto Matriculation Requirement Term: Fall 2003 Academic Program: Undergrad</p> <p>*Academic Plan: ECON-BA Economics (BA) Major *Plan Sequence: 10 Degree: BA *Declare Date: 01/02/2003 Degree Checkout Stat: *Requirement Term: 2037 Fall 2003 Student Degree Nbr: *Advisement Status: Include Completion Term:</p> <p>Save Return to Search Notify Refresh Add Update/Display Include History Correct History</p>
<p>12</p> <p>Update the Requirement Term to reflect the updated term in the sub-plan.</p>		 <p>*Academic Plan: ANTH-BA Anthropology (BA) Major *Plan Sequence: 10 Degree: BA *Declare Date: 03/02/2007 Degree Checkout Stat: *Requirement Term: 2063 Spring 2006 Student Degree Nbr: *Advisement Status: Include Completion Term:</p>
<p>13</p> <p>Click on the Save button to save your changes.</p> <p></p>		 <p>*Academic Sub-Plan: ECON BUSEC Business Economics Academic Sub-Plan Type: Concentration *Declare Date: 01/02/2003 *Requirement Term: 2037 Fall 2003</p> <p>Save Return to Search Notify Refresh Add</p>