

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 a sub-plan to a student record.

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NEED ADDITIONAL INFORMATION?

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

Student Records STAFF - http://www.sonoma.edu/it/cms/documentation.html Last Updated: 10/27/14



Lesson 1: Adding or Changing a Plan

Navigation: Main Menu > 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	Navigate to the Student Program Plan page using the navigation:	Student Program/Plan Enter any information you have and click Search. Leave fields blank for a list of all values.		
	Records and Enrollment> Career and Program Information> Student	Find an Existing Value Add a New Value ID:		
	Program/Plan	Academic Career:		
		Student Career Nbr: = Campus ID: begins with		
		National ID: begins with		
		Last Name: begins with First Name: begins with		
		Include History Case Sensitive		
		Search Clear Basic Search Save Search Criteria Find an Existing Value Add a New Value Image: Clear Criteria Image: Clear Criteria		

Continued on the next page...



Step	Action	Screenshot
2	Enter the necessary information to look up the student who needs a plan added or changed.	Student Program/Plan Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Add a New Value
		ID: = ↓ 000000000 Academic Career: = ↓ Student Career Nbr: = ↓ Campus ID: begins with ↓ National ID: begins with ↓ Last Name: begins with ↓ First Name: begins with ↓ Include History Case Sensitive Search Clear Basic Search Find an Existing Value Add a New Value
3	Click on the Include History button. Include History NOTE: This step must be completed prior to adding or changing any student plan.	SOCMP Sonoma State University UGRD Undergraduate 2037 Fall 2003 2037 Fall 2003 2133 Sprng 2013 * Campus: MAIN * Notify Refreen * Notify Refreen * Student Sub-Plan Student Attributes Student Degrees
4	All of the student's current and historical program information will be displayed. Click on the Plus button to add another Program row.	Undergraduate Career Requirement Term Student Career Nbr: 0 First I or 1 I ar 1 I ar 1 Active In Program Image: Career Requirement Term Image: Career Requirement Term Image: Career Nbr: 0 03/01/2011 Image: Career Requirement Term Effective Sequence: Image: Career Requirement Term Image: Career Nbr: 0 DATA Data Change Action Date: 03/01/2011 Image: Career Requirement Term Effective Sequence: Image: Career Requirement Term DATA Data Change Action Date: 03/01/2011 Image: Career Requirement Term Sonoma State University Image: Career Requirement Term UGRD Undergraduate Image: Career Requirement Term Admissions Image: Career Requirement Term Sonoma State University Image: Career Requirement Term UGRD Undergraduate Image: Career Requirement Term Image: Career Requirement Term 2037 Fall 2003 Fall 2003 Application Nbr: 0 2037 Fall 2002 Fall 2003 Image: Career Requirement Term



Step Action Screenshot 5 Enter the program action of PLNC into the Program Action box. This signifies a plan change. Student Program (Student Program (Student Agriculte)) Sally Sonoma Correct Requirement Ten (Student Program Action Date) Student Program (Student Program (Student Agriculte)) Sally Sonoma Correct Requirement Ten (Student Program Action: PLNC) Pan Change Sally Sonoma Student Program (Student Agriculte)) 6 Click on the Student Plan tab. Student Program (Student Program (Student Agriculte)) 7 Click on View All to see all of the student's plan history. This ensures that the correct plan is changed or added. Student Student Career Nbr: 0 Car Req Ten (Student Student Career Nbr: 0) 001043283 Othergraduate Student Career Nbr: 0 Car Req Ten (Student Student Career Nbr: 0)	
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6 Click on the Student Plan tab. Student Program Student Plan Student Attributes Sally Sonoma 00000000 Academic Career: Undergraduate Career Requirement Ten Status: Active in Program *Effective Date: 03001/2011 *Program Action: PLNC Plan Change Action Reason: Q *Academic Institution: Sonoma State University 7 Click on View All to see all of the student's plan history. This ensures that the correct plan is changed or added. Image: Student Subert Attributes 001843283 O Undergraduate Student Career Nbr: 0 Car Req Term Fig [View] Discontinued Admit Term: Fal 2003	Action Date:
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Discontinued Admit Term: Fall 2003	1:
	All First 🗹 1 of 18 🕨 Last
02/14/2011 Effective Sequence: 1	
Plan Change Action Date: 03/14/2011 Requirement Term: Fall 2003	
Undergrad	
	All First 🖪 1 of 2 🗋 Last
BIOL-BS Q Biology (BS) Major	+-
10 Degree: BS	
09/14/2010 iii Degree Checkout Stat:	
2097 Q Fall 2009 Student Degree Nbr:	Credentials
Include Completion Term:	



Step	Ac	tion		Scre	enshot		
8	Determine the plan that requires the		Student Program Student Plan Student Sub-Plan Student Attributes Student Degrees				
	addition or chang		Sally Sonoma		00000000	0	
	lf	Then	Academic Career:	Undergraduate	Student Career Nbr:	0 Car Req Term:	
	A plan needs to be added (major or minor) A plan needs to be changed (major or minor)	Go to step 9. Go to step 10.	Status: Effective Date: Program Action: Action Reason: Academic Program: *Academic Plan: *Plan Sequence: *Declare Date: *Requirement Term: *Advisement Status:	Active in Program 03/11/2011 Plan Change Undergrad BIOL-BS Q Biology (BS) 10 09/14/2010 10 2097 Q Fall 2009 Include	Admit Term: Effective Sequence: Action Date: Requirement Term: Degree: Degree Checkout Stat: Student Degree Nbr: Completion Term:	Fall 2003 1 03/11/2011 Fall 2003 Fing [View. Major BS	First Tota of ta Las:
			Status: Effective Date: Program Action: Action Reason: Academic Program: *Academic Plan:	Discontinued 03/01/2011 Discontinuation Out for 2 Terms Undergrad BIOL-BS	Admit Term: Effective Sequence: Action Date: Requirement Term:	Fall 2003 1 03/01/2011 Fall 2003 <u>Find</u> View. Vlajor	All First 🗐 1 or 2 🗋 Lass 🛊 🖿
9	Click on the Plus a new row to the	button to add existing plan.	Student P <u>r</u> ogram Student F Sally Sonoma	Plan 🗍 Student Sub-Plan 🗍 Student <u>A</u> t	iributes Y Student <u>D</u> egree	65 Ø	
			Academic Career:	Undergraduate	Student Career Nbr:	0 Car Req Term:	
			Status: Effective Date: Program Action: Action Reason: Academic Program: *Academic Plan: *Plan Sequence:	Active in Program 03/11/2011 Plan Change Undergrad BIOL-BS 10 BIOlogy (BS)	Admit Term: Effective Sequence: Action Date: Requirement Term: N Degree:	Find View 1 Fail 2003 1 03/11/2011 Fail 2003 Find View Wajor BS	First 1 1-18 of 18 D Lass All First 1 of 2 D Lass



Step		Action		Screenshot		
10	Click on the Ma to search for the add/change for	ignifying Glass icon e appropriate plan to the student record. ppropriate plan from	*Plan Sequence:	30 03/14/2011	Degree: Degree Checkout Stat: Student Degree Nbr: Completion Term:	
11	If The major is declared in the same term as the default	Then Go to step 12.	*Academic Plan: *Plan Sequence: *Declare <u>Date:</u> *Requirement Term: *Advisement Status:	ANTH-BA Anthropol 30 03/14/2011 B 2113 Sprng 2011 Include	ogy (BA) Major Degree: BA Degree Checkout Stat: Student Degree Nbr: Completion Term:	
	term The major is declared in a term that is later than the default term	Update the Requirement Term to the declared term.			Degree: Degree Checkout Stat: Student Degree Nbr: Completion Term: St be the default value	
12	If appropriate change the declare date to reflect the student's request.			ANTH-BA Anthropo 30 03/14/2011	· ·	
13	Click Save to complete the changes.		*Advisement Sta	n to Search		



Lesson 2: Adding a Sub-Plan

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

<u>INTRODUCTION</u>: The following table will outline the steps necessary to add a subplan to a student record.

Step	Action	Screenshot		
1	Locate the student by entering their	Student Program/Plan		
	name and/or student ID.	Enter any information you have and click Search. Leave fields blank for a list of a		
		Find an Existing Value		
		ID:		
		ID: = V Academic Career: = V		
		Student Career Nbr: =		
		Campus ID: begins with V		
		National ID: begins with V		
		Last Name: begins with V		
		First Name: begins with V		
		Include History Correct History Case Sensitive		
		Search Clear Basic Search 📳 Save Search Criteria		
2	Check the Include History box and	Include History		
	click Search.	Search Clear Basic Search		
3	Add a row on the Student Program	Student Program Student Plan rees		
	page by clicking on the " plus " button. 🛨	Sally Sonoma 🔰 🕍 🖻 🗭		
		Academic Career: Under		
		rst 🖪 1 of 1 🕨 Last		
		Status: Active		



Step	Action	Screenshot
4	In the Program Action box enter " PLNC " (Plan Change for the Program Action) Program Action: NOTE: The magnifying glass (Lookup Button) next to any box will allow you to view available entries.	Student Program Student Plan Student Sub-Plan St Sally Sonoma Vindergraduate C: Academic Career: Undergraduate C: Status: Leave of Absence 'Effective Date: 10/01/2006 'Program Action: PLNC Q Plan Change
5	In the Action Reason box enter "SUBP" (Adding a Sub-Plan) Action Reason:	Status: Leave of Absence *Effective Date: 10/01/2006 3 *Program Action: PLNC Q PLNC Q Plan Change Action Reason: SUBP Q
6	Click on the Student Sub-Plan tab at the top of the screen. Student Sub-Plan	Student Program Student Plan Student Sub-Plan Student Attributes Student Sally Sonoma 0 0 0 0 Academic Career: Undergraduate Student Career Nbr: 0
7	Click on View All to view all of the student's academic plans.	Academic Plan: Anthropology (BA) Major Requirement Term: Spring 2006
8	Use the Lookup button to display available sub-plan options in the Academic Sub-Plan box. Select the appropriate sub-plan for the student.	Student Program Student Plan Sally Sonoma Academic Career: Undergraduate Status: Leave of Absence Effective Date: 10/01/2006
	*Academic Sub-Plan:	Program Action: Plan Change Action Reason: Adding a Sub-Plan Academic Program: Undergraduate Academic Plan: Image: Comparison of the second secon
		Requirement Term: Fall 2003 'Academic Sub-Plan: Q

Student Records



Step	Act	ion	S	creenshot
9	Enter the appropriate on Date field.	date in the Declare		
	*Declare Date:	12/31/2005 🛐		
			*Academic Sub-Plan:	ECON BUSEC Q Business Economics
	lf	Then		
	The student is	Leave the defaulted	Academic Sub-Plan Type:	Concentration
	declaring the plan and the sub-plan on	Declare Date.	*Declare Date:	01/02/2003
	the same day		*Requirement Term:	2037 🔍 Fall 2003
	The student is	Update the Declare		
	declaring a sub-plan	Date field with the		
	after the declaration	date on which the		
	of a plan	sub-plan is being declared.		
	(catalog year). This wi student's program adm *Requirement Term:			
	lf	Then		
	The student's sub-	Allow the	*Academic Sub-Plan:	ECON BUSEC Q Business Economics
	plan existed in their	Requirement Term	Academic Sub-Plan Type:	
	original catalog year	to default to the		Concentration
	and they want to	program admit term.	*Declare Date:	
	catalog year	Go to step 13.	*Requirement Term:	2037 🔍 Fall 2003
	The student has a	Update the		
	sub-plan that is	Requirement Term		
	newer than their	with the catalog		
	original catalog year	year necessary to determine the sub-		
	or they would like to switch to the current	plan courses.		
	catalog year	Go to step 11.		



Step	Action	Screenshot
11	Return to the Student Plan tab to update the Plan Requirement Term .	Student Program Student Plan Student Attributes Sally Sonoma 000000000 Academic Career: Undergraduate Student Career NI
12	Update the Requirement Term to reflect the updated term in the sub-plan.	*Academic Plan: ANTH-BA Anthropology (BA) Major *Plan Sequence: 10 Degree: BA *Declare Date: 03/02/2007 Degree Checkout Stat: * *Requirement Term: 2063 sprng 2006 Student Degree Nbr: *Advisement Status: Include Completion Term:
13	Click on the Save button to save your changes. Save	*Academic Sub-Plan: ECON BUSEC Q Business Economics Academic Sub-Plan Type: Concentration *Declare Date: 01/02/2003 第 *Requirement Term: 2037 Q Fall 2003 Save QReturn to Search ENotify Refresh