

# 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 <b>Include History</b> button. Include History NOTE: This step <b>must</b> 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 <b>Plus</b> 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 Action:       Plan Change         6       Click on the Student Plan tab.       Student Program Student Plan Student Attributes         Sally Sonoma       Student Program       Student Program         *Effective Date:       Undergraduate       Career Requirement Ten         Status:       Active in Program       Action Reason:       *Effective Date:         *Effective Date:       0301/2011       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.       *Program Student Student Attributes       Student Attributes         001643283       Outerraduate       Student Career Nbr: 0       Car Req Tem         Discontinued       Admit Term:       Fall 2003	Student Career Nbr: 0
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Action Reason:       Some State University         6       Click on the Student Plan tab.       Student Program Student Plan Student Attributes         Sally Sonoma       00000000         Academic Career:       Undergraduate       Career Requirement Ter         Status:       Active in Program       Plan Change         Action Reason:       Plan Change       Action Reason:         *Program Action:       PLNC Plan Change       Action Reason:         *Academic Institution:       SOCMP Sonoma State University       Very         7       Click on View All to see all of the student's plan history. This ensures that the correct plan is changed or added.       Very       Student Subert Career Nbr: 0       Car Req Term         Undergraduate       Student Career Nbr: 0       Car Req Term       Fig 1 Yery         Discontinued       Admit Term:       Fal 2003	Effective Sequence:
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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: Status is in the student is the correct plan is changed or added.         8       Image: Student Suberlan is changed or added.       Image: Student Suberlan is changed or added.	
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Academic Career:       Undergraduate       Career Requirement Ten         Status:       Active in Program         *Effective Date:       03/01/2011         *Program Action:       PINC Q         Plan Change         Action Reason:       Q         *Academic Institution:       SOCMP Q         Somona State University         T       Click on View All to see all of the student's plan history. This ensures that the correct plan is changed or added.         Undergraduate       Student Attributes         Student's plan history. This ensures that the correct plan is changed or added.         Undergraduate       Student Career Nbr: 0         Car Req Term         Discontinued       Admit Term:         Find View	0
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7       Click on View All to see all of the student's plan history. This ensures that the correct plan is changed or added.       tPlan Student Sub-Plan Student Attributes Student Degrees         001643283       001643283         Undergraduate       Student Career Nbr: 0       Car Req Term         Find   View.       Discontinued       Admit Term:       Fall 2003	
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	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 <b>Plus</b> 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 <b>Save</b> 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 " <b>plus</b> " button. 🛨	Sally Sonoma 🔰 🕍 🖻 🗭		
		Academic Career: Under		
		rst 🖪 1 of 1 🕨 Last		
		Status: Active		



Step	Action	Screenshot
4	In the <b>Program Action</b> box enter " <b>PLNC</b> " (Plan Change for the Program Action) <b>Program Action:</b> 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 <b>Student Sub-Plan</b> 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 <b>View All</b> to view all of the student's academic plans.	Academic Plan: Anthropology (BA) Major Requirement Term: Spring 2006
8	Use the <b>Lookup</b> button to display available sub-plan options in the <b>Academic Sub-Plan</b> 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 <b>Date</b> field.	date in the <b>Declare</b>		
	*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 <b>Declare</b>		
	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 <b>Student Plan</b> tab to update the Plan <b>Requirement Term</b> .	Student Program         Student Plan         Student Attributes           Sally Sonoma         000000000           Academic Career:         Undergraduate         Student Career NI
12	Update the <b>Requirement Term</b> 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 <b>Save</b> 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