

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

## OBJECTIVE:

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

## CONTENTS:

<b>LESSON 1: ADDING OR CHANGING A PLAN.....</b>	<b>2</b>
<b>LESSON 2: ADDING A SUB-PLAN.....</b>	<b>7</b>

### ***NEED ADDITIONAL INFORMATION?***

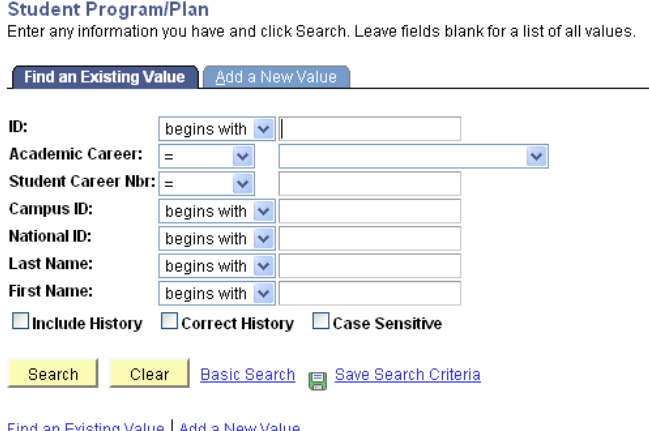
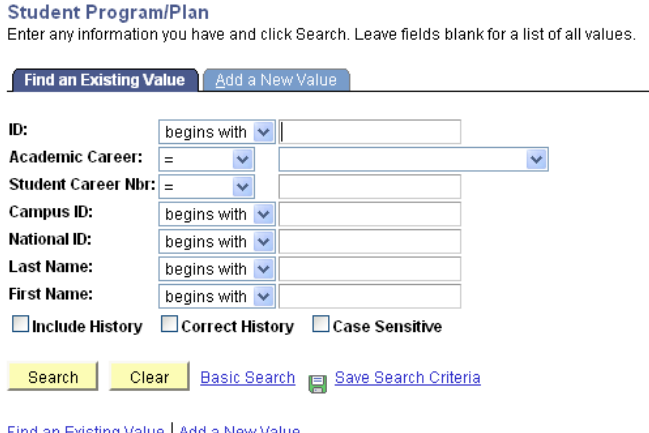
For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/cms/contact.shtml> to locate the **Student Records Functional Lead** under Student Administration.

## **Student Records**

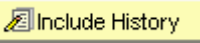



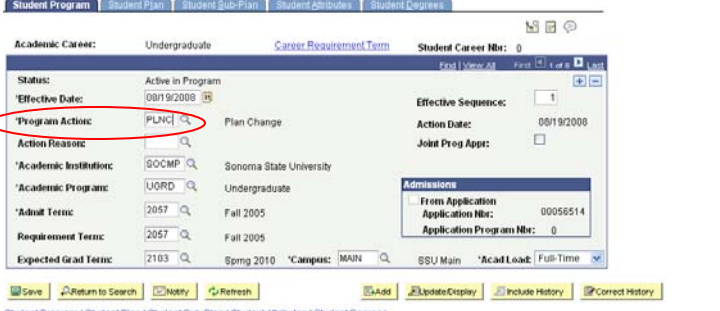
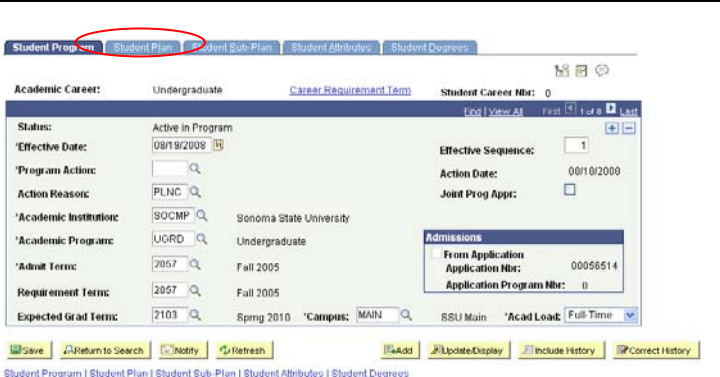
# Lesson 1: Adding or Changing a Plan

**Navigation:** Records and Enrollment > Career and Program Information > Student and 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.

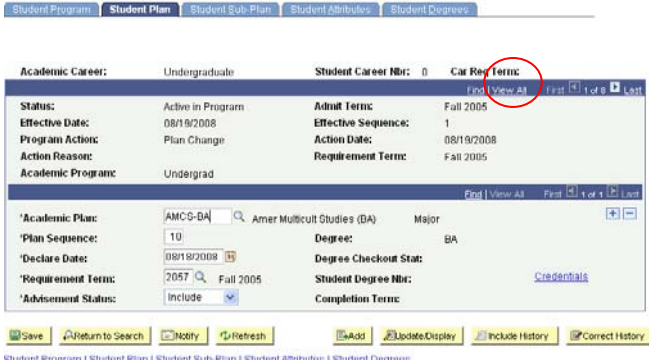
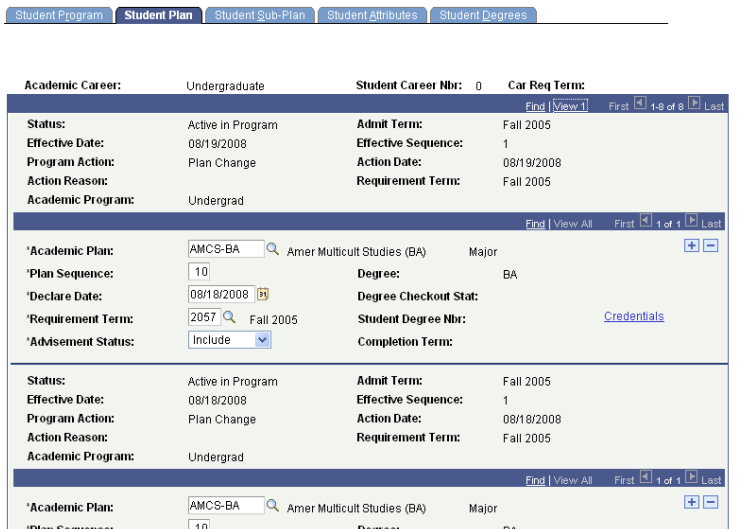

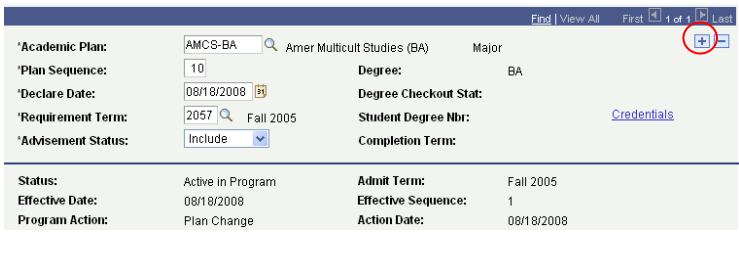
Step	Action	Screenshot
1	Navigate to the Student and Program Plan page using the navigation above.	
2	Enter the necessary information to look up the student who needs a plan added or changed.	

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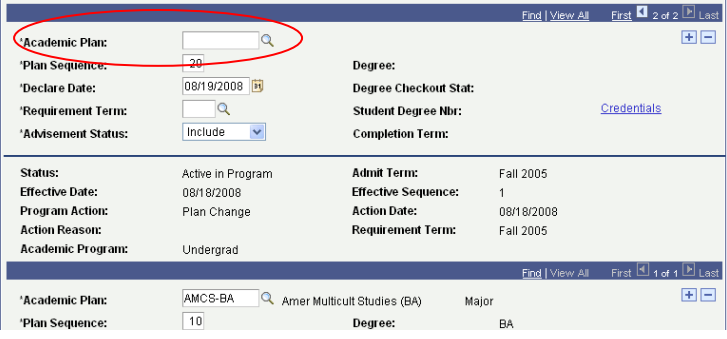

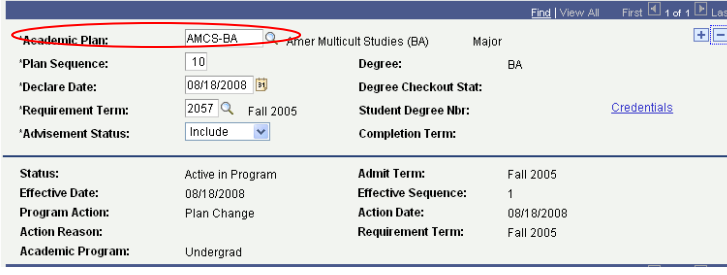
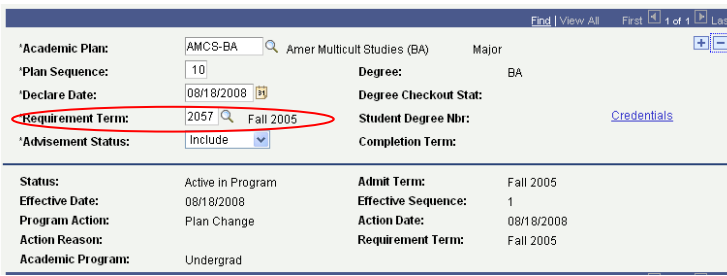
<p>3</p> <p>Click on the <b>Include History</b> button.</p>  <p>NOTE: This step <b>must</b> be completed prior to adding or changing any student plan.</p>	
<p>4</p> <p>All of the student's current and historical program information will be displayed. Click on the <b>Plus</b> button to add another Program row. </p>	
<p>5</p> <p>Enter the program action of PLNC into the <i>Program Action</i> box. This signifies a plan change.</p>	
<p>6</p> <p>Click on the <b>Student Plan</b> tab.</p>	

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## Student Records

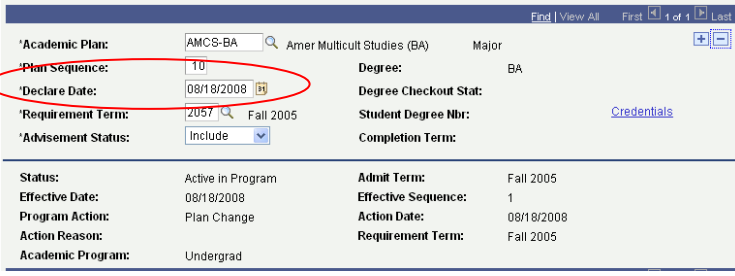

<p>7</p> <p>Click on <b>View All</b> to see all of the student's plan history. This ensures that the correct plan is changed or added.</p>								
<p>8</p> <p>Determine the plan that requires the addition or change.</p> <table border="1" data-bbox="203 913 755 1207"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>A plan needs to be added (major or minor)...</td> <td>Go to step 9.</td> </tr> <tr> <td>A plan needs to be changed (major or minor)...</td> <td>Go to step 11.</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 11.		
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A plan needs to be changed (major or minor)...	Go to step 11.							
<p>9</p> <p>Click on the <b>Plus</b> button to add a new row to the existing plan.</p> <p></p>								

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<p>10</p>	<p>Click on the Magnifying Glass icon to search for the appropriate plan to add to the student record.  Select the appropriate plan from the list.</p> <p>Go to step 12.</p>							
<p>11</p>	<p>Click on the Magnifying Glass icon of the Academic Plan to search for the appropriate plan to change the student to.  Select the appropriate plan from the list.</p>							
<p>12</p>	<table border="1" data-bbox="186 1029 625 1512"> <thead> <tr> <th data-bbox="186 1029 406 1071">If</th> <th data-bbox="406 1029 625 1071">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="186 1071 406 1291">The major was declared in the same term as the default term...</td> <td data-bbox="406 1071 625 1291">Go to step 13.</td> </tr> <tr> <td data-bbox="186 1291 406 1512">The major was declared in a term that is later than the default term...</td> <td data-bbox="406 1291 625 1512">Update the Requirement Term to current term.</td> </tr> </tbody> </table> <p data-bbox="186 1543 625 1692">NOTE: The requirement term must be the default value or later unless otherwise approved by the Dept.</p>	If	Then	The major was declared in the same term as the default term...	Go to step 13.	The major was declared in a term that is later than the default term...	Update the Requirement Term to current term.	
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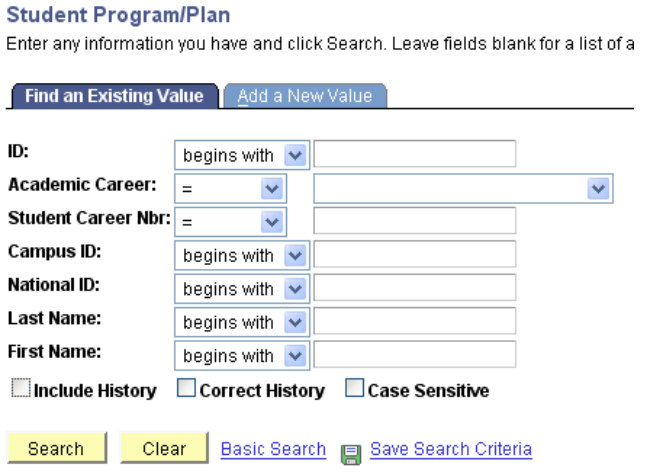
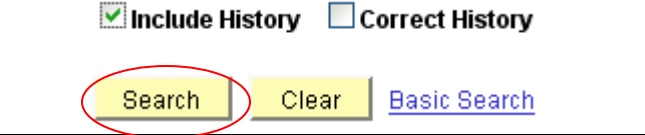

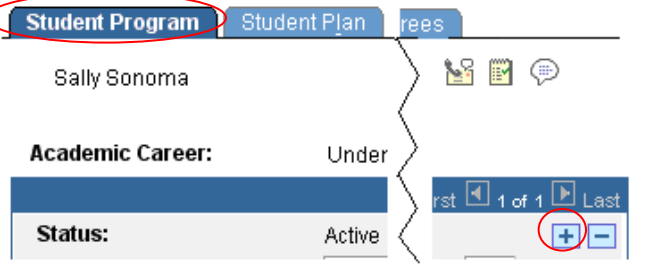
## Student Records

<p>13</p>	<p>If appropriate change the declare date to reflect the student's request.</p>	 <p>Find   View All   First   1 of 1   Last</p> <p>*Academic Plan: AMCS-BA Amer Multicult Studies (BA) Major</p> <p>*Plan Sequence: 10 Degree: BA</p> <p>*Declare Date: 08/18/2008 Degree Checkout Stat: <a href="#">Credentials</a></p> <p>*Requirement Term: 2057 Fall 2005 Student Degree Nbr:</p> <p>*Advisement Status: Include Completion Term:</p> <hr/> <p>Status: Active in Program Admit Term: Fall 2005</p> <p>Effective Date: 08/18/2008 Effective Sequence: 1</p> <p>Program Action: Plan Change Action Date: 08/18/2008</p> <p>Action Reason: Requirement Term: Fall 2005</p> <p>Academic Program: Undergrad</p>
<p>14</p>	<p>Click <b>Save</b> to complete the changes.</p>	 <p>Program Action: Application Action Date: 10/27/2004</p> <p>Action Reason: Incomplete File Requirement Term: Fall 2005</p> <p>Academic Program: Undergrad</p> <p>Find   View All   First   1 of 1   Last</p> <p>*Academic Plan: PRE-BUS Pre-Business Administration Major</p> <p>*Plan Sequence: 10 Degree: BS</p> <p>*Declare Date: 10/27/2004 Degree Checkout Stat: <a href="#">Credentials</a></p> <p>*Requirement Term: 2057 Fall 2005 Student Degree Nbr:</p> <p>*Advisement Status: Include Completion Term:</p> <p><b>Save</b>   Return to Search   Previous in List   Next in List   Notify   Refresh   Add   Update/Display   Include History   Correct History</p> <p><a href="#">Student Program</a>   <a href="#">Student Plan</a>   <a href="#">Student Sub-Plan</a>   <a href="#">Student Attributes</a>   <a href="#">Student Degrees</a></p>



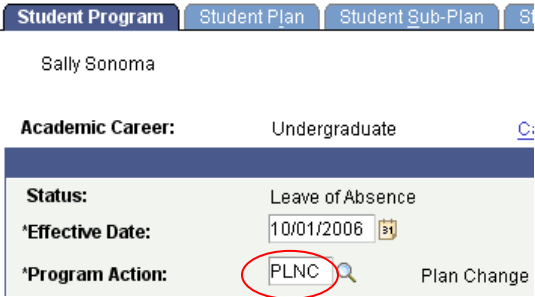

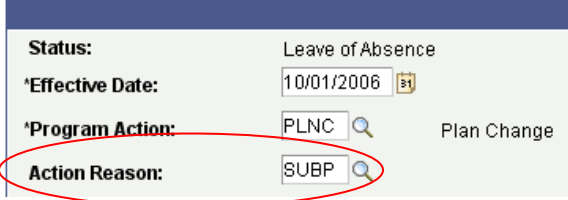
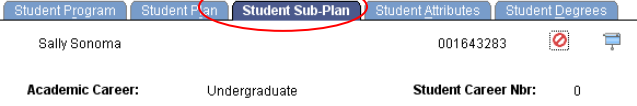


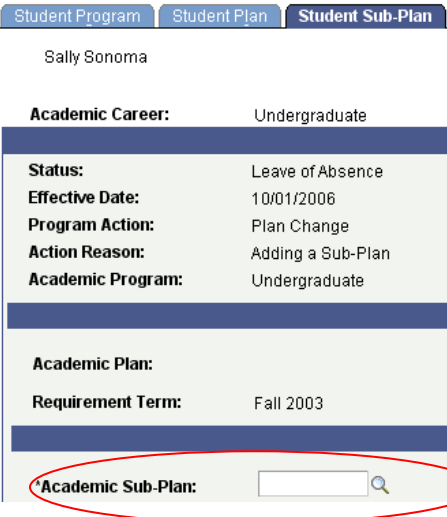
## Lesson 2: Adding a Sub-Plan

**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 <b>Search</b> .	
3	Add a row on the <b>Student Program</b> page by clicking on the “plus” button. 	

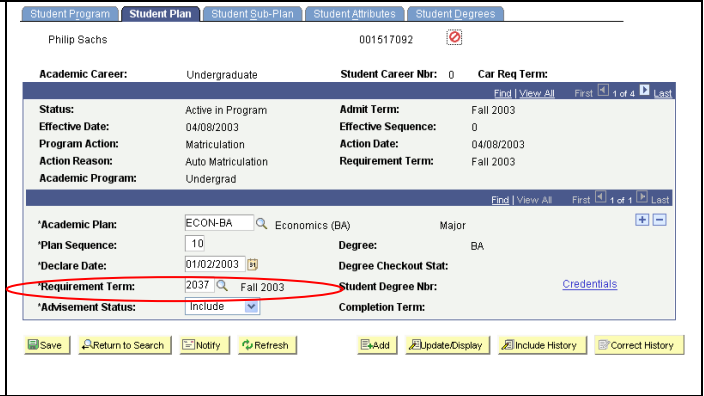
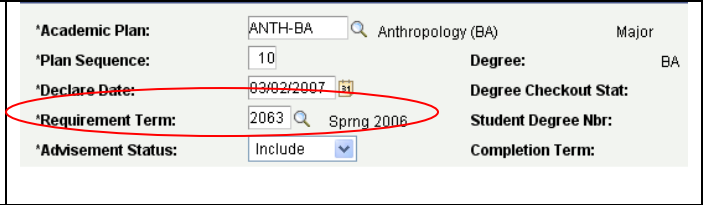


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<p>4</p>	<p>In the <b>Program Action</b> box enter “<b>PLNC</b>” (Plan Change for the Program Action)</p> <p><b>*Program Action:</b> <input type="text" value="PLNC"/> </p> <p>NOTE: The magnifying glass (<b>Lookup Button</b>) next to any box will allow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

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<p>9</p>	<p>Enter the appropriate date in the <b>Declare Date</b> field.</p> <p>*<b>Declare Date:</b> <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 <b>Declare Date</b>.</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 <b>Declare Date</b> 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 <b>Declare Date</b> .	The student is declaring a sub-plan after the declaration of a plan...	Update the <b>Declare Date</b> field with the date on which the sub-plan is being declared.	<p>*<b>Academic Sub-Plan:</b> <input type="text" value="ECON BUSEC"/>  Business Economics</p> <p><b>Academic Sub-Plan Type:</b> Concentration</p> <p>*<b>Declare Date:</b> <input type="text" value="01/02/2003"/> </p> <p>*<b>Requirement Term:</b> <input type="text" value="2037"/>  Fall 2003</p>
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<p>10</p>	<p>If necessary update the <b>Requirement Term</b> (catalog year). This will default to the student's program admit term.</p> <p>*<b>Requirement Term:</b> <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 <b>Requirement Term</b> 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 <b>or</b> they would like to switch to the current catalog year...</td> <td data-bbox="522 1390 834 1648">Update the <b>Requirement Term</b> 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 <b>Requirement Term</b> 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 <b>or</b> they would like to switch to the current catalog year...	Update the <b>Requirement Term</b> with the catalog year necessary to determine the sub-plan courses. Go to step 11.	<p>*<b>Academic Sub-Plan:</b> <input type="text" value="ECON BUSEC"/>  Business Economics</p> <p><b>Academic Sub-Plan Type:</b> Concentration</p> <p>*<b>Declare Date:</b> <input type="text" value="01/02/2003"/> </p> <p>*<b>Requirement Term:</b> <input type="text" value="2037"/>  Fall 2003</p>
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<p>11</p> <p>Return to the <b>Student Plan</b> tab to update the Plan Requirement Term.</p>		 <p>Student Program Student Plan Student Sub-Plan Student Attributes Student Degrees</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</p> <p>Effective Date: 04/08/2003 Effective Sequence: 0</p> <p>Program Action: Matriculation Action Date: 04/08/2003</p> <p>Action Reason: Auto Matriculation Requirement Term: Fall 2003</p> <p>Academic Program: Undergrad</p> <p>*Academic Plan: ECON-BA Economics (BA) Major</p> <p>*Plan Sequence: 10 Degree: BA</p> <p>*Declare Date: 01/02/2003 Degree Checkout Stat:</p> <p>*Requirement Term: 2037 Fall 2003 Student Degree Nbr:</p> <p>*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 <b>Requirement Term</b> to reflect the updated term in the sub-plan.</p>		 <p>*Academic Plan: ANTH-BA Anthropology (BA) Major</p> <p>*Plan Sequence: 10 Degree: BA</p> <p>*Declare Date: 03/02/2007 Degree Checkout Stat:</p> <p>*Requirement Term: 2063 Spring 2006 Student Degree Nbr:</p> <p>*Advisement Status: Include Completion Term:</p>
<p>13</p> <p>Click on the <b>Save</b> button to save your changes.</p> <p></p>		 <p>*Academic Sub-Plan: ECON BUSEC Business Economics</p> <p>Academic Sub-Plan Type: Concentration</p> <p>*Declare Date: 01/02/2003</p> <p>*Requirement Term: 2037 Fall 2003</p> <p>Save Return to Search Notify Refresh Add</p>