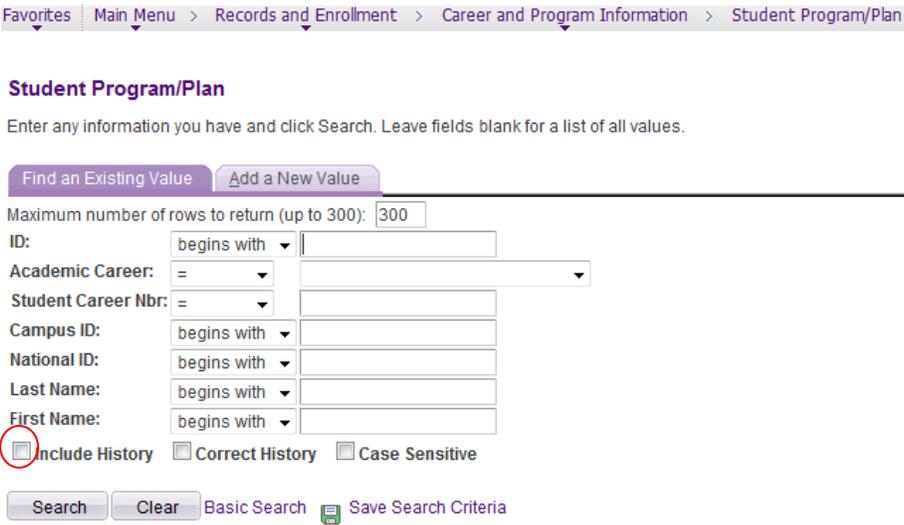
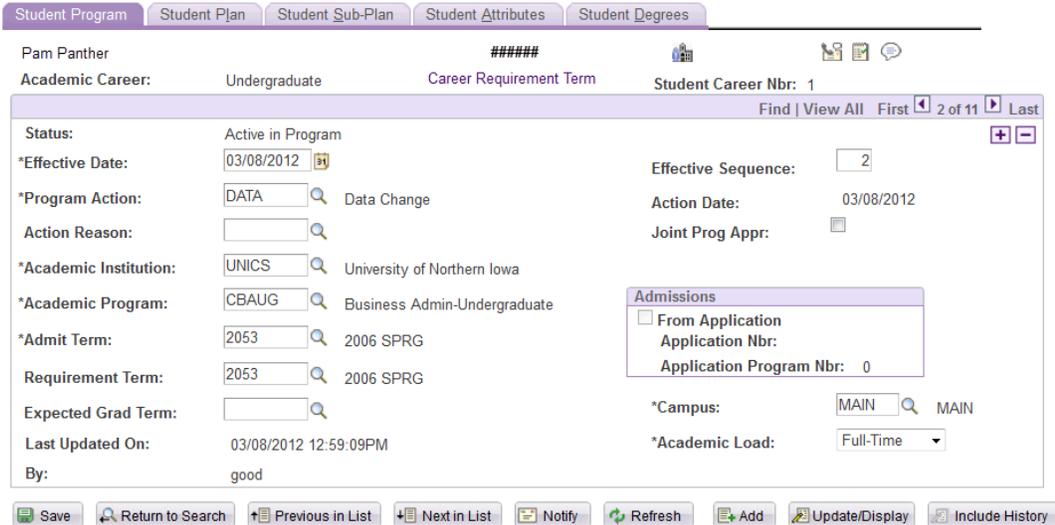
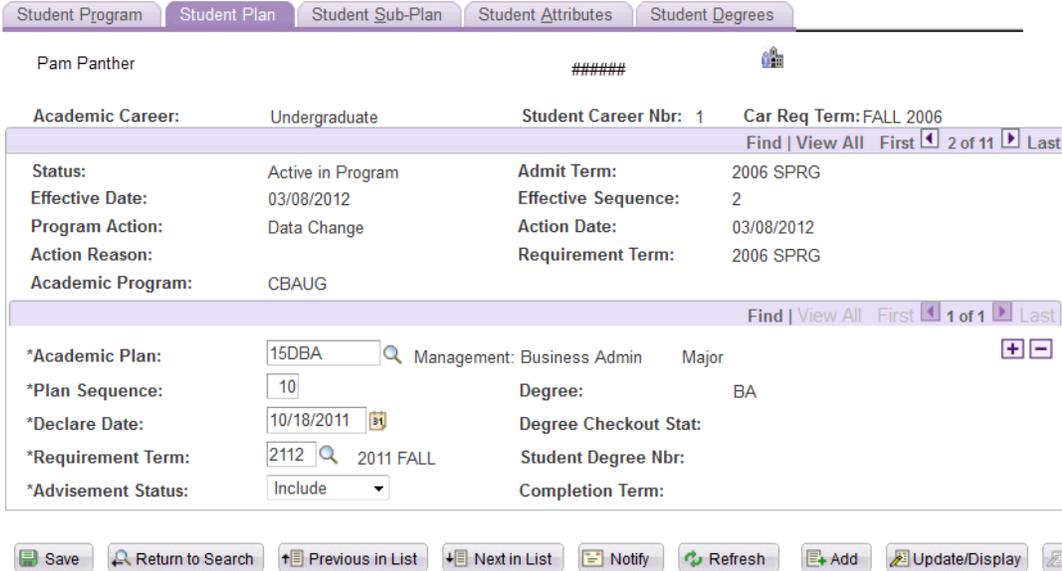


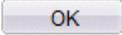
## Changing a Student's Program/Plan

**Purpose:** The following instructions describe how update a student’s Program/Plan (fka College/Major). **IMPORTANT:** Always check the **Include History** option. See *Scenario Matrix Appendix* for additional information.

Step	Action
1.	<p>Navigate to the <b>Student Program/Plan</b> page. Select <b>Main Menu &gt; Records and Enrollment &gt; Career and Program Information &gt; Student Program/Plan</b></p>  <p>*Don't forget to select <b>Include History</b> each time!</p>
2.	<p>Enter appropriate search criteria. Click the <b>Search</b> button.</p> <p><b>Result:</b> The <b>Student Program/Plan</b> page displays.</p> 



Step	Action
3.	On the <i>Student Program</i> tab, click the <b>Add New Row</b> button. 
4.	<p>Complete the following:</p> <ul style="list-style-type: none"> <li>• <b>Effective Date</b> – Defaults to today’s date. Update as appropriate. <i>Note:</i> If a term has already begun, use a date within that term.</li> <li>• <b>Program Action</b> – Select <b>PRGC – Program Change</b> or <b>PLNC – Plan Change</b>, as appropriate</li> <li>• <b>Action Reason</b> – leave blank</li> <li>• <b>Academic Institution</b> – Defaults to <b>UNICS</b></li> <li>• <b>Academic Program</b> – Select or enter the new <i>Program</i> (e.g. CBAUG)</li> <li>• <b>Admit Term</b> – DO NOT CHANGE</li> <li>• <b>Requirement Term</b> – Select or enter the appropriate requirement term. Requirement Term indicates the term in which academic advisement degree progress requirements apply to the student.</li> <li>• <b>Expected Grad Term</b> – DO NOT CHANGE</li> <li>• <b>Last Updated</b> – Date the status was changed</li> <li>• <b>By</b> – Username of the person who updated the status</li> </ul>
5.	<p>Click the <i>Student Plan</i> tab.</p>  <p><i>Note:</i> If student is adding a minor, use the Add Row button to add minor. You will see major already listed. Continue to “stack” the minor.</p>

Step	Action
6.	<p>On the <b>Student Plan</b> page, complete the following:</p> <ul style="list-style-type: none"> <li>• <b>Academic Plan</b> – Enter or select the appropriate plan (e.g. 152BA-Accounting)</li> <li>• <b>Plan Sequence</b> – System generated order, may be updated if needed. (10 = first major, 20 = 2<sup>nd</sup> major, 30 = 3<sup>rd</sup> major, 40 = 1<sup>st</sup> minor, 50 = 2<sup>nd</sup> minor, 60 = pre-professional, 70 = certificates, etc.) NOTE: If student is new to UNI, sequence of “1” displays. Change to “10”.</li> <li>• <b>Declare Date</b> – Defaults to today’s date.</li> <li>• <b>Requirement Term</b> – Defaults to requirement term selected on Program tab</li> <li>• <b>Advisement Status</b> – Defaults to <i>Include</i>. <i>Values:</i> <ul style="list-style-type: none"> <li>○ <b>Include:</b> Ensures that all requirement groups that match this structure are pulled into an audit.</li> <li>○ <b>Not Include:</b> Ensures that all requirement groups that match this structure are not pulled into an audit.</li> <li>○ <b>Optional:</b> Pulls in requirement groups that match this structure, but will not prevent the overall audit from going complete if unsatisfied.</li> </ul> </li> </ul>
7.	Use the <b>Student Sub-Plan</b> tab to enter sub-plans (e.g. certificates), if applicable.
8.	Click the <b>OK</b> button. 
9.	<p>Update the Advisor table with a new row matching the new program/plan. NOTE: Even if we change a student from pre to declared, the plan needs to be updated.</p> <p><b>Main Menu &gt; Records and Enrollment &gt; Student Background Information &gt; Student Advisor.</b> (See <i>Changing a Student’s Advisor Job Aid</i>)</p>



**Scenario Matrix – Appendix**

Scenario	Example	Procedural Tips
<p><b>Add Plan (Major) in same Program</b></p> <p>CHANGE MAJOR SAME PROGRAM</p>	<p>CBA Program student wants to change plan (major) from Accounting to Management</p>	<ul style="list-style-type: none"> <li>• Add new Program row  <ul style="list-style-type: none"> <li>○ <b>Effective Date</b> – Today’s date</li> <li>○ <b>Program Action</b> - PLNC</li> <li>○ <b>Academic Program</b> – Don’t change</li> <li>○ <b>Admit Term</b> – Don’t change</li> <li>○ <b>Requirement Term</b> – Don’t change</li> </ul> </li> <li>• On the Plan tab                             <ul style="list-style-type: none"> <li>○ <b>Academic Plan</b> – Select new plan</li> <li>○ <b>Plan Sequence</b> – Change if needed, first plan starts with 10.</li> <li>○ <b>Declare Date</b> – Defaults to today’s date</li> <li>○ <b>Requirement Term</b> – Change to current term</li> </ul> </li> <li>• <b>Save</b></li> <li>• Update Advisor</li> </ul>
<p><b>Add Plan (Major) in same Program</b></p> <p>DOUBLE MAJOR SAME PROGRAM</p>	<p>CBA Program student is currently an Accounting Major. Student wants to add Management plan (major) also, becoming a double major in the same program.</p>	<ul style="list-style-type: none"> <li>• Add new Program row  <ul style="list-style-type: none"> <li>○ <b>Effective Date</b> – Today’s date</li> <li>○ <b>Program Action</b> - PLNC</li> <li>○ <b>Academic Program</b> – Don’t change</li> <li>○ <b>Admit Term</b> – Don’t change</li> <li>○ <b>Requirement Term</b> – Don’t change</li> </ul> </li> <li>• On the Plan tab                             <ul style="list-style-type: none"> <li>○ Keep current plan</li> <li>○ Use the Add Row button  at the Plan level to add plan</li> <li>○ <b>Academic Plan</b> – Select</li> <li>○ <b>Plan Sequence</b> – Must change to correct sequence code</li> <li>○ <b>Declare Date</b> – Defaults to today’s date</li> <li>○ <b>Requirement Term</b> – Change to current term</li> </ul> </li> <li>• <b>Save</b></li> <li>• Update Advisor</li> </ul>

Scenario	Example	Procedural Tips
<p><b>Add Plan (Major) in a <u>different</u> Program</b></p> <p>CHANGE MAJOR DIFFERENT PROGRAMS</p>	<p>COE Program (Plan is Early Childhood Ed, 210PRET) student wishes to change program and plan (major) to SBSUG/Psychology, 400BA</p>	<ul style="list-style-type: none"> <li>• Before you start, copy the current <i>Admit term</i>, as you will need to re-enter on the new plan.</li> <li>• Add new Program row  <ul style="list-style-type: none"> <li>○ <b>Effective Date</b> – Today’s date</li> <li>○ <b>Program Action</b> - PRGC</li> <li>○ <b>Academic Program</b> – Select new</li> <li>○ <b>Admit Term</b> – blanks out, re-enter</li> <li>○ <b>Requirement Term</b> –re-enter</li> <li>○ Tip: Select <b>View All</b> to see blanked out fields if you forgot to copy</li> </ul> </li> <li>• On the Plan tab <ul style="list-style-type: none"> <li>○ <b>Academic Plan</b> – Select plan</li> <li>○ <b>Plan Sequence</b> – Change if needed</li> <li>○ <b>Declare Date</b> – Defaults to today’s date</li> <li>○ <b>Requirement Term</b> – Change to current term</li> </ul> </li> <li>• <b>Save</b></li> <li>• Update Advisor</li> </ul>
<p><b>Add Plan (Major) in a <u>different</u> Program</b></p> <p>DOUBLE MAJOR DIFFERENT PROGRAMS</p>	<p>COE Program (Plan is Early Childhood Ed, 210PRE) student wishes to add program and plan (major) of SBSUG/Psychology, 400BA, becoming a double major in two different programs.</p>	<p>You must add a new career for the student.</p> <ul style="list-style-type: none"> <li>• Search to see what career should be added. All students start with a 0 career.</li> <li>• On the <b>Student Program/Plan</b> search page, click the <i>Add New Value</i> tab.</li> <li>• Enter the student’s <i>ID</i>, select the appropriate <i>Academic Career</i>, and update the Student Career Nbr with the next career. E.g. If they have a 0 career, this new one would be a 1.</li> <li>• Click the <b>Add</b> button</li> </ul> <p>On the Program tab</p> <ul style="list-style-type: none"> <li>○ <b>Effective Date</b> – Today’s date</li> <li>○ <b>Program Action</b> - ACTV</li> <li>○ <b>Academic Program</b> – Select</li> <li>○ <b>Admit Term</b> – blanks out, re-enter, hit <b>Enter</b> to populate the Requirement Term.</li> <li>○ <b>Requirement Term</b> – pre-populates</li> </ul> <ul style="list-style-type: none"> <li>• On the Plan tab <ul style="list-style-type: none"> <li>○ <b>Academic Plan</b> – Select</li> <li>○ <b>Plan Sequence</b> – Change to correct sequence code</li> <li>○ <b>Declare Date</b> – Defaults to today’s date</li> <li>○ <b>Requirement Term</b> – Change to current term</li> </ul> </li> <li>• <b>Save</b></li> <li>• Update Advisor</li> </ul>



Scenario	Example	Procedural Tips
<b>Add Plan (Minor)</b>	CBA Program, Economics Plan, 921BA, would like to add Math (800MIN)	<ul style="list-style-type: none"> <li>• First, always select the 0 (zero) Career</li> <li>• Add new Program row  <ul style="list-style-type: none"> <li>○ <b>Effective Date</b> – Today’s date</li> <li>○ <b>Program Action</b> - PLNC</li> <li>○ <b>Academic Program</b> – Keep same as major</li> <li>○ <b>Admit Term</b> – Don’t change</li> <li>○ <b>Requirement Term</b> – Don’t change</li> </ul> </li> <li>• On the Plan tab                             <ul style="list-style-type: none"> <li>○ Click the <b>Add Row</b> button</li> <li>○ <b>Academic Plan</b> – Select</li> <li>○ <b>Plan Sequence</b> – Change (Plan sequence begins with 40 for the 1<sup>st</sup> minor, 50 for the 2<sup>nd</sup>, etc.</li> <li>○ <b>Declare Date</b> – Don’t change, today’s date</li> <li>○ <b>Requirement Term</b> – Change to current term</li> </ul> </li> <li>• <b>Save</b></li> </ul>
<b>Drop Plan (Major)</b>	Declared 212 BAT (Elem Ed) and 210 BAT (Early Childhood). Wishes to drop 210 BAT.	<ul style="list-style-type: none"> <li>• Add new Program row </li> <li>• Program Action - PLNC</li> <li>• Delete  appropriate row on Plan tab</li> <li>• <b>Save</b></li> <li>• Remove Advisor row for the plan that is being dropped.</li> </ul>
<b>Drop Plan (Double Major)</b>	Double major: COE Program (Plan is Early Childhood Ed, 210PRE) and plan (major) of SBSUG/Psychology, 400BA, student wishes to drop Psychology major.	<ul style="list-style-type: none"> <li>• Discontinue (Follow Discontinue Process)</li> <li>• Move minor to active Program/Plan</li> <li>• <b>Save</b></li> <li>• Remove Advisor row for the plan that is being dropped.</li> </ul>
<b>Drop Plan (Minor)</b>	CBA Program, Economics Plan, 921BA, would like to drop Minor Nutrition & Food Science 31MMIN	<ul style="list-style-type: none"> <li>• Add new Program row </li> <li>• Program Action - PLNC</li> <li>• Delete  appropriate row on Plan tab</li> <li>• <b>Save</b></li> </ul>

## ***BIG Tips:***

- **Include History** - Always check the **Include History** option on the initial Student Program/Plan search page.
- **Plan Changes** - When doing program/plan changes for 2<sup>nd</sup> BA, use “P” (e.g. COEP vs. COEUG and 212BATP vs. 212BAT).
- **HFN** - For returning students who still have a CNS or HFA row, we must add an HFN effective row dated 8/1/2011. Changes to HFN must have an *Admit Term*  $\geq$  2112; do not change the *Requirement Term*. For changes from HFN, the *Admit Term* must be changed back to the original *Admit Term*.
- **Saving** - Do NOT save until you have completed all changes, especially if you are deleting the HFN row, making a change, and re-adding the row.
- **CBA Changes** - Any changes to CBA must go through CBA Advising Center.
- **Student Athlete Changes** - Any changes to Student Athletes must go through Athletic Advising Team. Check for the positive service indicator icon (star). If it indicates student athlete, stop processing and give to Diane Wallace.
- **Admit Term vs. Requirement Term** - The *Admit Term* is the term they were admitted to the University. If this field blanks out when you are making changes, re-enter (You may need to look at history in Program/Plan to find this date). The *Requirement Term* is generally the same as the *Admit Term*.
- **Adding Majors/Minors** - If you are adding a major or minor use the **Add Row**  button (do not edit existing majors or minors) ensure you are not wiping out any current majors or minors. Note: Sequence numbers for majors start with 10, and then 20, etc. For minors they start with 40, and then 50, etc.
- **Dual Careers** – If the student has multiple careers, you will see more than one matching record display at the bottom when you search for the student on the Student Program/Plan search page. If you have questions, please contact your Record Analyst to assist or complete.
- **Missing Advisors** – Departments who have a Workspace may contact Michele Peck to add a report showing missing Advisors (this report may be run at any time). Michele will forward the report on a monthly basis to those Departments without a Workspace.
- **Teaching** – When changing a student to or from Teaching, notify the Registrar’s Office so that the Student Group can be added or deleted.