Academic Information Systems
Requirement Term Change

5/10/06
Version 2.0
Requirement Term Change

Department super-users may change the Requirement Term of a student’s Plan and/or Sub-Plan. College super-users may update a student’s Requirement Term for University Requirements and College Requirements.

This training manual documents the process by which an adviser updates a student’s plan in AIS. If you have questions please email the AIS Help Desk (ais-help@ucsc.edu).
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## Module 1: Updating Program Requirement Terms (University and General Education Requirements)

### Objectives:
- Navigating to Student Program Plan
- Updating a Program Requirement Term

### Lesson 1: Navigating to Student Program/Plan

1. **From MyUCSC.**
   - One-Click Academic Advising Pagelet – click Student Program/Plan.
   - Menu – click Student Records > Career/Program/Plan > Student Program/Plan.

2. **From AIS.**
   - Home > Manage Academic Records > Track Student Careers > Use > Student Program/Plan.

### Question and Answer Session

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<tr>
<th>Notes:</th>
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Lesson 2: Updating a Program Requirement Term

This process applies to College Advisers.

Do not enter a new Proposed Major if the student’s current row is DISC, COMP, they have applied to graduate (Program Action = DATA, Action Reason = ACAN), or rescheduled candidacy to graduate (Program Action = DATA, Action Reason = RSCH).

1. Enter Student ID. Press Return.
   
   Opens Student Program Tab.
   
   If not on Student Program Tab, click on Student Program.
   
   Keystroke = Ctrl-R

2. On Student Program click Add .
   
   Adds a new row in the Student Program/Plan Stack.
   
   a. Enter Program Action and Action Reason.
      
      Program Action = DATA
      
      Action Reason = RTRM

3. Update Requirement Term.

4. Save .

? Question and Answer Session
Module 2: Updating Plan and Sub-Plan Requirement Terms (Major and College)

Objectives:
- Updating Plan and Sub-Plan Requirement Terms

Lesson 1: Updating Plan and Sub-Plan Requirement Terms

Do not enter a new Major if the student’s current row is DISC, COMP, they have applied to graduate (Program Action = DATA, Action Reason = ACAN), or rescheduled candidacy to graduate (Program Action = DATA, Action Reason = RSCH).

Departmental and College requirements are “Plans” in AIS. The process for changing Requirement Terms are the same.

1. Enter Student ID.
   Opens Student Program Tab.
   If not on Student Program Tab, click over to Student Program.
   Keystroke = Ctrl-R.

Notes:
2. On Student Program click Add +.  
   Adds a new row in the Student Program/Plan Stack.
   
   a. Enter Program Action and Action Reason.
      
      Program Action = DATA  
      Action Reason = RTRM

3. Click Student Plan Tab.  
   Keystroke = Ctrl-L
   
   a. Click the second “View All.”
   b. Update Requirement Term in the correct Plan.

Follow Step 4 if the Major has a concentration. If not, proceed to Step 5.

4. Click on Student Sub-Plan.  
   Keystroke = Ctrl-S
a. Click the second “View All.”
b. Find correct Academic Plan.
c. Update Sub-Plan Requirement Term.

5. Save.

Question and Answer Session
**Frequently Asked Questions**

Q. I made a mistake what do I do?
A. Contact a Records Adviser in the Office of the Registrar. They should be able to assist you in correcting the mistake.

Q. How do I indicate a change in major?
A. A change in major is on the same page, but a different training document. Please see Plan Change – Declaration of Major/Proposed Major Change.

Q. My department recently changed its name but I don’t see it in a list of options for Academic Plan. How do I enter the plan change?
A. Plans, like requirements are effective-dated. If your new major is not appearing, enter the quarter the plan became active in the Requirement Term.

Q. I have a student who wants to change their requirement term after they have announced candidacy to graduate. How do I change their major?
A. Contact Student Records in the Office of the Registrar to make the major change and update the student’s Announcement of Candidacy to graduate. The Records Adviser will need the student’s ID and the new Requirement Term.

**Error Messages**

Q. I received the following error when I tried to go from the Student Program Tab to the Student Plan Tab:

**Effective date/sequence must be greater than effective date/sequence of current record. (15/6)**

An effective date or sequence number has been entered that is not greater than the effective date or sequence of the current record and you are in Update mode. Either enter an effective date/sequence that is greater than the current record, or change your mode to Correction.

What is Correction mode? What does the error message mean?

A. **Correction mode is a mode that corrects AIS. It is a very “powerful” mode and is limited to a few individuals.**

The error message indicates there is a future effective dated row and you are trying to make a change before the top/current record. This happens most often when a student takes a Leave of Absence, returns from Readmission, or changes their College.

You may add the major by changing the effective date to the same future date and increasing the effective sequence by one. If the change should happen before the future effective-dated row, contact a Records Adviser in the Office of the Registrar for assistance.
Q. I received the following error when I tried to save:

A program Action of Completed is not valid for Effective Date: 2006-03-06, Sequence #1. (14600,57)

An Academic Program cannot be Completed unless the Program Status is initially Active

What does this mean?

A. This error message appears when you try to save a row on top of a Completed Program Row (COMP). A similar message will also appear if you try to save a plan change with a Discontinuation Row (DISC). Contact a Records Adviser in the Office of the Registrar for assistance.
<table>
<thead>
<tr>
<th>Glossary</th>
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<tbody>
<tr>
<td><strong>Academic Career</strong></td>
<td>A grouping of all academic coursework undertaken by a student at a school that the school groups into a single student record. At UCSC, there are two academic careers defined – undergraduate and graduate.</td>
</tr>
<tr>
<td><strong>Academic Group</strong></td>
<td>The highest level breakdown of the academic institution for academic structural proposes. For UCSC purposes, one &quot;General&quot; Academic Group has been configured. Rules at this level of Academic Structure are consistent across UCSC.</td>
</tr>
<tr>
<td><strong>Academic Institution</strong></td>
<td>An entity, such as a university, which runs independently from other like entities and has its own set of rules and business processes. A single Institution for UCSC was defined, with a value of UCSCM (UCSCM is the main campus for UCSC).</td>
</tr>
<tr>
<td><strong>Academic Organization</strong></td>
<td>This structural element defines how an academic institution is organized from an administrative perspective. At UCSC, the academic organization is UCSCM, UC Santa Cruz.</td>
</tr>
<tr>
<td><strong>Academic Plan</strong></td>
<td>An area of study—such as a major, minor, or specialization—that is within an academic program or within an academic career. Degrees are tied to a plan. Plans are linked to and offered by academic programs. At UCSC, these have been categorized as Declared Major, Proposed Major, Minor, Graduate Course of Study, and Non-Degree (for students in the Non Degree Program). In addition, since UCSC Colleges implement college-specific graduation requirements (including core coursework), an undergraduate College Plan category has been configured.</td>
</tr>
<tr>
<td><strong>Academic Program</strong></td>
<td>The entity that a student applies to, is admitted to, and graduates from (in the case of a degree-earning program). In the UCSC configuration, these entities were categorized according to the distinct admissions processes and administrative units involved in admitting students to our campus. Graduates are admitted to Programs by individual Departments. Undergraduates are admitted on a broader level to 3 distinct Undergraduate Programs: Degree-Seeking, Non Degree-Seeking, and 2nd Degree.</td>
</tr>
<tr>
<td><strong>Academic Sub-Plan</strong></td>
<td>The area of specialization within a plan. For UCSC purposes, these have been configured to include Major Concentrations, Advising Clusters (within the Undeclared Plan), and Parenthetical degree notations (for graduates).</td>
</tr>
<tr>
<td><strong>Academic Term</strong></td>
<td>An administrative time period within which sessions are defined, students are billed and statistics are accumulated for individual students as well as for the entire institution. Term values have no</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
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<td>intrinsic meaning.</td>
<td>They are sequential numbers used to keep terms in sequence. At UCSC, current terms include: 2040 for 2004 Winter Quarter, 2042 for 2004 Spring Quarter, 2048 for 2004 Fall Quarter, etc.</td>
</tr>
<tr>
<td>Breadcrumbs</td>
<td>A term used for the page navigation path. Breadcrumbs appear as hyperlinks that allow you to navigate between menu levels.</td>
</tr>
<tr>
<td>Browser</td>
<td>An application program that searches the Internet, interprets language, and presents the web page. Internet Explorer and Netscape Navigator are browsers.</td>
</tr>
<tr>
<td>Campus</td>
<td>A campus is usually associated with a separate physical administrative location. UCSC has one campus – Main.</td>
</tr>
<tr>
<td>Class</td>
<td>A specific offering of a course component within a specific academic term.</td>
</tr>
<tr>
<td>Component</td>
<td>A group of related pages in AIS that pertain to a specific task.</td>
</tr>
<tr>
<td>Correct History</td>
<td>An action mode that allows the user to change data in past dated fields.</td>
</tr>
<tr>
<td>Course</td>
<td>A course offered by a school, usually described in the course catalog.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The date on which a data field becomes active.</td>
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<tr>
<td>EmplID</td>
<td>A unique seven-digit number assigned to each record in Campus Community and used as the main key number within the AIS system. Students will know it as their “Student ID”.</td>
</tr>
<tr>
<td>Grading Scheme</td>
<td>A collection of all valid grade bases (e.g. Letter Graded, Pass/Not Pass, Multi-Term etc.), their grades (A-F, P, NP, I, IP, etc.), and grade detail (Grade Points, Include in GPA, Earn Credit, etc.) for a given career.</td>
</tr>
<tr>
<td>Home</td>
<td>The highest level in the menu navigation structure; this is also the default page when you access AIS 8.</td>
</tr>
<tr>
<td>Hyperlink</td>
<td>A highlighted and underlined word or phrase on a web page that, when clicked, takes you to another page or component.</td>
</tr>
<tr>
<td>Lookup</td>
<td>The function that allows you to view tables containing valid values.</td>
</tr>
<tr>
<td>Page</td>
<td>The area in AIS where you can view, add, update, and save data.</td>
</tr>
<tr>
<td>Page Action Buttons</td>
<td>Command buttons that allow you to save updates, access records, navigate, and access other pages.</td>
</tr>
<tr>
<td>Program Action</td>
<td>In Admissions, this field is roughly equivalent to the admit status in our current Admissions System. Values include ‘application’, ‘admitted’, ‘denied’, ‘waitlisted’, ‘matriculated’ and others. The field is also used in Student Records with some different values available</td>
</tr>
<tr>
<td><strong>Search Record</strong></td>
<td>A list of defined search keys that help you find existing data. Every component or single page you access has a search mechanism.</td>
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<td><strong>Service Indicators</strong></td>
<td>These are levels of service, both positive and negative, which an individual is to receive. Negative service indicators include holds. Positive service indicators include front of the line registration for special groups of students.</td>
</tr>
<tr>
<td><strong>Subject Area</strong></td>
<td>The specific areas of instruction in which courses are offered within academic organizations. For example, when a course is identified as Math 101, math is the subject area. For the UCSC configuration, all subject areas currently in SIS were entered into the AIS database.</td>
</tr>
<tr>
<td><strong>Update/Display</strong></td>
<td>An action mode that allows the user to access fields that are current and future dated.</td>
</tr>
<tr>
<td><strong>Update/Display All</strong></td>
<td>An action mode that allows the user to access all fields—past, current and future dated.</td>
</tr>
<tr>
<td><strong>URL</strong></td>
<td>The Uniform Resource Locator is the address or name by which documents on the Internet are stored and retrieved.</td>
</tr>
<tr>
<td><strong>Waivers</strong></td>
<td>Tuition waivers can be set up to reduce some or all of a student’s charges. Waiver criteria is set up to identify students who will receive the waiver.</td>
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