

Graduation Checklists and Honors Checklists

Tutorial

Audience: Department Advisers, College Advisers

Summary

For Department Advisers: tells how to update a graduation checklist to show that the student has completed or not completed all major or minor requirements. It shows how a department adviser creates honors checklists for a student.

For College Advisers: For students with individual majors who've applied to graduate, tells how to create and submit to the Registrar a paper or PDF verification form generated by an InfoView report.

Originator

Jim Jones, Registrar Senior Analyst, Advising Systems, Office of the Registrar

Last Update

May 13, 2020

Table of Contents

Introduction	3
More About Graduation Checklists	3
Navigating to the Student Checklist Page.....	3
Find and View a Checklist.....	4
Complete a Checklist	7
Denying Graduation	9
Adding Honors	9
Create a Graduation Requirements Verification Form for Students with Individual Majors	11
Frequently Asked Questions	12
Appendix A: Graduation Checklists	13

Introduction

When a student files for graduation, AIS batch jobs automatically create graduation checklists for that student. This document tells you, the advisor, how to find the checklists and mark the individual checklist items as completed or failed. When all the checklist items are marked complete, the student is approved to graduate.

This document also tells department advisors how to create and approve a checklist that grants the student honors or highest honors from the department.

If you are a college adviser, and a student with an individual major has applied to graduate: follow the completely different procedure described in the section “Create Graduation Requirements Verification Form for Students with Individual Majors.”

More About Graduation Checklists

As stated above, AIS batch jobs automatically create graduation checklists. Checklists are created once a week for students of each division according to this schedule:

- Humanities - Monday AM
- School Of Engineering - Tuesday AM
- Social Sciences - Wednesday AM
- Arts - Thursday AM
- PBSci - Friday AM

Sometimes a graduating student’s academic plan will change at the last moment, and it may be several days before new checklists will be generated for that division. If you need the new checklist immediately, contact regsys@ucsc.edu to have one made.

Navigating to the Student Checklist Page

You can reach the Student Checklist page in three ways:

- From the MyUCSC home page:
One-Click Academic Advising Pagelet > Person Checklist Summary
- From the MyUCSC Main Menu:
Main Menu > Student Records > Comments/Checklists > Person Checklist Summary
- From AIS:
Campus Community > Checklists > Person Checklists > Person Checklist Summary.

Find and View a Checklist

To view a student’s checklists:

1. When you choose the Person Checklist Summary page, a search form appears. Enter the student’s AIS ID number or campus ID. (If their campus email is astudent@ucsc.edu, “astudent” is their campus ID.) Then Click the Search button.

Person Checklist Summary
 Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

ID: begins with []

Campus ID: begins with []

National ID: begins with []

Last Name: begins with []

First Name: begins with []

Case Sensitive

Limit the number of results to (up to 1000): 300

Search Clear Basic Search Save Search Criteria

Enter the student’s AIS ID or campus ID

2. The Person Checklist Summary page appears. Your ID appears in the Responsible ID field.

To see all checklists for this student, remove your ID from the Responsible ID field, and click Search.

Checklist Summary Operator 3C Groups Summary

Selection Criteria

Function [] Variable Data

Checklist Type Checklist Responsible ID Status

[] [] 0166104 All

Search

Remove your ID from the Responsible ID field. Then click Search.

Search Results

Status Institution and Function

Checklist	Item	Description	Due Date	Item Status
Edit View				

Save Return to Search Notify

Checklist Summary | Operator 3C Groups Summary

3. A list of the student’s checklists appears. By each checklist or checklist item, click View to view the checklist, or Edit, to edit the checklist.

Search Results

Status	Institution and Function		
	Checklist	Item	Description
Edit View	DTIMA		
Edit View	DTIMA	DRQVER	Graduation Requirements Verif.
Edit View	DTIMA	DSRCPE	SR Comp -Comprehensive Courses
Edit View	RGUCSC		
Edit View	RGUCSC	RGAMHI	Amer Hstry & Inst Requirment
Edit View	RGUCSC	RGSRES	Senior Residence Requirement

- Pick a checklist and click View. This detail page appears with information about that checklist.

[Checklist Detail 1](#) | [Checklist Detail 2](#)

Checklist Date Time: 02/23/2016 1:37:01AM
Administrative Function: SPRG Student Program
Academic Institution: UC Santa Cruz
Checklist Code: DTIMA Maj Verif Technol Info Mgt BS
Status: Completed **Status Date:** 01/16/2017
Due Date: 02/24/2016
Due Amount: Currency Code
Comments:

[Save](#) [Return to Search](#) [Notify](#)

[Checklist Detail 1](#) | [Checklist Detail 2](#)

- The Checklist Detail 1 tab appears first. To see more information about individual checklist items, click the Checklist Detail 2 tab.

Checklist Detail 1 **Checklist Detail 2**

Checklist Date Time: 02/23/2016 1:37:01AM

Administrative Function: Student Program Status: Completed

Academic Institution: UC Santa Cruz Status Date: 01/16/2017

Checklist Code: Maj Verif Technol Info Mgt BS Due Date: 02/24/2016

Checklist Item Table					
Sequence	Item		Status	Status Date	Due Date
100	DRQVER	DRQVER	Completed	01/16/2017	02/24/2016
Responsible ID: 8888888			Name: Registrar,Office of the		

Sequence	Item		Status	Status Date	Due Date
200	DSRCPE	DSRCPE	Completed	01/16/2017	02/24/2016
Responsible ID: 8888888			Name: Registrar,Office of the		

Save Return to Search Notify

6. Click Return to Search to return to the list of checklists.

Complete a Checklist

This section tells how to find and complete a student’s graduation checklist.

Follow the directions in the previous section: Go to the Person Checklist summary page. Enter the student’s ID on the Search form. Then:

1. When the Person Checklist Summary page appears, remove your ID from the Responsible ID field (on the Checklist Detail 1 tab). Then click Search.

Remove your ID to see all checklists for this student. Then click Search.

2. A list of all checklists for this student appears. Find the graduation checklist and click the Edit button.

Search Results

Status	Institution and Function					
	Checklist	Item	Description	Due Date	Item Status	
Edit View	DTIMA			02/24/2016		
Edit View	DTIMA	DRQVER	Graduation Requirements Verif.	02/24/2016	Completed	
Edit View	DTIMA	DSRCPE	SR Comp -Comprehensive Courses	02/24/2016	Completed	
Edit View	RGUCSC			05/19/2016		
Edit View	RGUCSC	RGAMHI	Amer Hstry & Inst Requirement	05/19/2016	Required	
Edit View	RGUCSC	RGSRES	Senior Residence Requirement	05/19/2016	Required	

3. The Checklist Management page appears. Change nothing on the Checklist Management 1 tab. Go to the Checklist Management 2 tab.

Checklist Date Time: 06/29/2016 1:25:48AM
 Administrative Function: Student Program Status: Completed
 Academic Institution: UC Santa Cruz Status Date: 12/20/2016
 Checklist Code: Maj Verif Environmental Std BA Due Date: 06/30/2016

*Sequence	*Item	*Status	*Status Date	*Due Date
100	DRQVER	Active	03/07/2017	06/30/2016
	Responsible ID: 8888888	Name: Registrar,Office of the		
200	DSRCPE	Active	03/07/2017	06/30/2016
	Responsible ID: 8888888	Name: Registrar,Office of the		

The checklist will have one or two items:

- A major plan checklist displays two rows: for the graduation requirement checklist item (DRQVER) and for the senior comprehensive checklist item. See Appendix A for a complete list of these codes.
- A minor checklist displays on one row: the graduation requirement (DRQVER).

4. In the Status field, change the status of the rows:

- If requirements for the checklist item are complete, choose “Completed” from the dropdown men. Accept the default status date and due date for this item
- Repeat for the second row. Choose “Completed” if the item has been completed.

5. Click the Save button. If both items have been marked completed, the checklist is fulfilled; the checklist status field on the Checklist Management 1 tab automatically changes its value from “Initiated” to “Completed”.

Denying Graduation

You will sometimes need to deny a student's graduation request. To do this, find and edit the student's graduation checklist as in the previous section. But instead of marking each checklist item "Completed:"

1. Select CANCELLED in the Status field for any item that was not completed.
2. Enter the last day of the quarter for Status Date.
3. Click Save.

The graduation application is now denied. Even if only one of the two checklist rows is cancelled, the student cannot graduate.

On the Checklist Management 1 tab, the status of the checklist remains INITIATED. It will remain that way indefinitely if no further changes are made.

Adding Honors

If a student earns department or comprehensive honors, the adviser should add an "honors" item to the graduation checklist.

To do this:

1. From the list of Checklist items on the Checklist Detail 2 tab, click the + (plus) sign at the end of the second item.

*Sequence	*Item	*Status	*Status Date	*Due Date
200	DSRCPE	Completed	12/20/2016	06/30/2016
	Responsible ID: 8888888	Name: Registrar, Office of the		
300	DHONOR	Completed	01/04/2017	06/30/2016
	Responsible ID: 0102856	Name: Bard, Donald Gibson		

Click the plus (+) sign to make a new blank checklist item row appear below.

In the Item field of the new row, choose DHONOR (Department Honors), DIHON (Highest Honors) or Senior Comprehensive Honors (DSRCP. Then choose "Completed" in the Status field. Leave the system-generated dates as is.

In the new blank checklist item line, enter data as follows:

- Item field: Enter DHONOR (Department Honors), DIHON (Department Highest Honors), or DSRCP (Senior Comprehensive Honors)
- Status field: Enter COMPLETED
- Status Date field: Leave as is
- Due Date: Leave as is

Now click the Save button.

Create a Graduation Requirements Verification Form for Students with Individual Majors

This special procedure applies only to graduating students with individual majors. Unlike students with other majors, students with individual majors do not get graduation checklists in AIS for advisers to approve.

When a student with a college individual major applies to graduate, the student's college must submit to the Registrar a paper (or PDF) verification form that a college adviser generates through an Infoview report.

The report is located in the Infoview Corporate Reports at:

Corporate Categories > AIS-Daily > 4 Graduation Processing and Degrees > "Graduation Requirements Verification form"

1. At the report prompts, the college adviser enters the following criteria:
 - **Expected Graduation Term Code:** for example, 2200.
 - **Degree Checkout Status:** for example, Applied for Graduation. (It's best to choose this from the list of values instead of entering it manually.)
 - **Student ID Number:** the student's seven-digit ID number.
 - **Plan Code:** the individual major plan code for your college. For Kresge, for example, it would be INKRBA.
2. Run the report.
3. When the report has run, export the report's "Form" tab as a PDF. This is the report form that you will submit to the Registrar's Office. (Do not export the "Form with Senior Comps" tab.)

NOTE: The other tabs may also be ignored: they are only relevant if the report is run again after the degree has been posted.
4. Complete the "Office Use Only" section. Then submit the form in PDF or hardcopy to the Office of the Registrar so that the degree determination can be posted.

Frequently Asked Questions

Q. Can Checklists be removed once initiated?

A. Yes. Please contact the Office of the Registrar to request this.

Q. Why is there a conflict message when I've "Completed" a checklist entry and saved it in Checklist Management 2?

A. The conflict message notifies you that the status of the completed checklist items on Checklist Management 2 do not match the status on Checklist Management 1. If all items are complete on Checklist Management 2, it will update Checklist Management 1 to "Complete." Conversely, if any items are in an "Initiated" or "Cancelled" status on Checklist Management 2, the status on Checklist Management 1 will always be "Initiated."

Never manually update the checklist status displayed on the Checklist Management 1 tab. The field will allow it, but then produce an error message. Let AIS update this field automatically to "Complete" when all checklist items have been completed.

Q. What is the Default Due Date?

A. The system displays the overall checklist due date as the default due date for each checklist item. It is the day after the current date. You can override this date but it must be with an earlier date so that the item due date does not exceed the overall due date of the checklist.

Q. Can a checklist (such as honors) be rescinded once completed?

A. Yes, checklist items may be removed. But if you need to do this after the quarter has ended, you must contact a Records and Enrollment Adviser at the Office of the Registrar.

Appendix A: Graduation Checklists

Use this worksheet when creating new graduation checklists. It contains all the information that you need to create a checklist, except the checklist codes for the individual plans. For your reference, enter them in the blanks in the left column.

Graduation Checklists	Checklist Item Code	Description
Administrative Function: SPRG	DHONOR	Department Honors
Variable Data: UGRD	DIHON	Department Highest Honors
Checklist Code (write-in): _____	DRQVER	Graduation Requirements Verif.
_____	DSRCP	Senior Comprehensive Honors
_____	DSRCPA	SR Comp - Comp Exam
_____	DSRCPB	SR Comp - GRE
_____	DSRCPC	SR Comp - Senior Seminar
_____	DSRCPD	SR Comp - MCAT
_____	DSRCPE	SR Comp - Comprehensive
_____	Courses	
_____	DSRCPF	SR Comp - Senior Thesis
_____	DSRCPG	SR Comp - Senior Orals
_____	DSRCPH	SR Comp - Senior Essay
_____	DSRCPI	SR Comp - Senior Exhibit
_____	DSRCPJ	SR Comp - Senior Show
_____	DSRCPK	SR Comp - Senior Recital
_____	DSRCPL	SR Comp - Senior Project
_____	DSRCPM	SR Comp - Senior Synthesis
_____	DSRCPN	SR Comp - Senior Colloquium
_____	DSRCPO	SR Comp - Other
	DSRCPJ	SR Comp - Graduate Seminar
	DSRCPQ	SR Comp - Student Directed
	Seminar	
	DSRCPR	SR Comp - Senior Internship