

Requirement Term Change Procedure

Tutorial

Audience: Department and College Advisers

Summary

This document describes how to change a student's program requirement term (for GE and university requirements) and academic plan/sub-plan requirement terms.

Originator

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

Last Update

April 30, 2019

Table of Contents

Introduction	3
Updating a Program Requirement Term	3
Updating Plan and Sub-Plan Requirement Terms	5
Frequently Asked Questions	7
Error Messages	8

Introduction

This procedure shows how to change a student's requirement terms on the AIS Student Program/Plan page.

Advisers can change two different types of requirements here:

- **Program Requirement Term.** The term code applies to general education requirements and university requirement. The student receives catalog rights for the program requirements that are current as of that term. College advisers with super-user rights can change this term.
- **Plan/Sub-plan Requirement Term.** The term code entered here applies to a specified academic plan and sub-plan. The student receives catalog rights for the plan/sub-plan requirements that area current as of that term.

Updating a Program Requirement Term

To change the requirement term (GE or University requirements catalog rights term), the college adviser will:

1. Go to the Student Program/Plan page in AIS. From the Academic Adviser Home Page:

Advising and Curriculum / Career/Program Plan / Student Program/Plan

Or from any page:

Navbar / Navigator / Records and Enrollment / Career and Program Info. / Student Program/Plan

2. On the Search page, enter the student's student ID in the ID field and click Search. You can enter their AIS ID number, or their campus email name: (jgcastle, for example).
3. The Student Program/Plan page appears. Click on the Student Program tab, if you are not there already. The tab displays the student's latest program information.

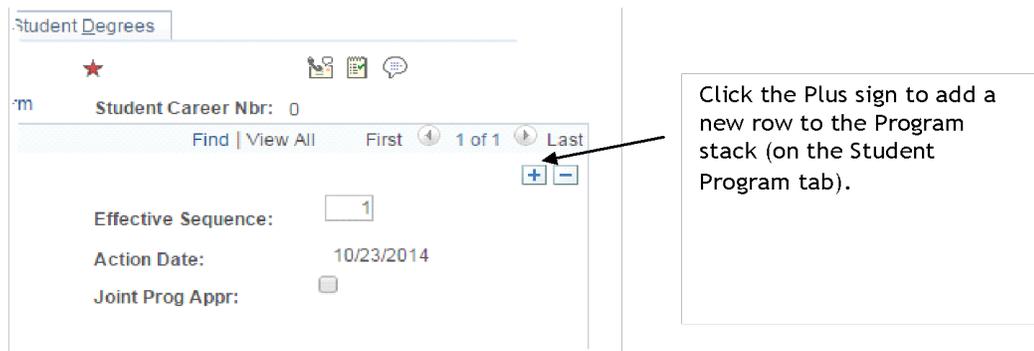
Check that you're on the Student Program tab.

Check the entries in the Program Action and Action Reason fields (Step 4).

Student Program		Student PJan	Student Sub-Plan	Student Attributes	Stud
Academic Career:	Undergraduate				
					Career Requirement Term
Status:	Active in Program				
*Effective Date:	10/23/2014				
*Program Action:	PLNC			Plan Change	
Action Reason:	MAJR			Change of Major via Office	
*Academic Institution:	UCSCM			UC Santa Cruz	
*Academic Program:	UGRD			Undergraduate	

4. Before doing anything else, check the Program Action and Action Reason field. DO NOT enter a new requirement term if:
 - The Program Action Field has an entry of COMP (student has completed the program)
 - The Program Action field has an entry of DISC (student has discontinued study)
 - The Program Action field reads DATA and the Action Reason field reads ACAN (student has applied to graduate).
 - The Program Action field reads DATA and the Action Reason field is blank (student has applied to graduate).
 - The Program Action field reads DATA and the Action Reason field reads RSCH (student has rescheduled graduation)

5. Still on the Student Program tab: add a new row to the Student Program stack. Click the Plus Sign button at the upper right-hand corner of the page.



6. On the new row: enter DATA in the Program Action field.



7. In the Action Reason field, enter RTRM.

8. In the Requirement Term field, enter the four-digit code for the updated requirement term (2168, 2178) over the term code that's already there.

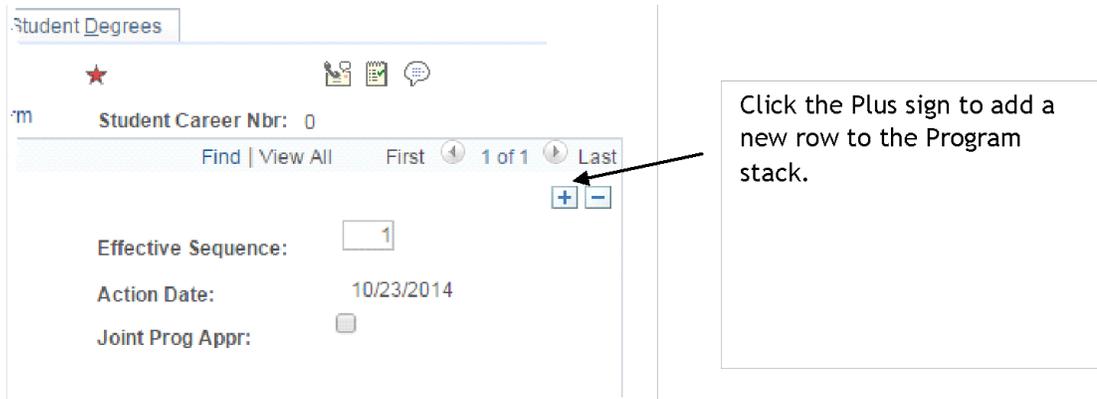
9. Press the SAVE button.

Updating Plan and Sub-Plan Requirement Terms

To update requirement terms for plans, sub-plans and colleges:

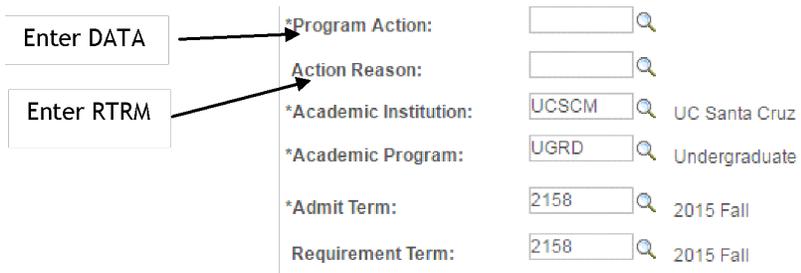
Return to the previous section, “Updating a Program Requirement,” and follow steps 1 through 4. Start here on Step 5.

- On the Student Program tab, add a new row to the Student Program Stack. Click the Plus Sign button at the upper right-hand corner of the page.



The screenshot shows the 'Student Degrees' interface. At the top, there is a 'Student Career Nbr: 0' and a navigation bar with 'Find | View All | First | 1 of 1 | Last'. Below this, there are fields for 'Effective Sequence: 1', 'Action Date: 10/23/2014', and 'Joint Prog Appr:'. A plus sign button is located at the bottom right of the main content area, with an arrow pointing to it from a callout box that reads: 'Click the Plus sign to add a new row to the Program stack.'

- Still on the Program Plan tab, enter DATA in the Program Action field, and RTRM in the Action Reason field.



The screenshot shows the 'Program Plan' tab with the following fields and values:

- *Program Action: (Callout: Enter DATA)
- Action Reason: (Callout: Enter RTRM)
- *Academic Institution: UCSCM UC Santa Cruz
- *Academic Program: UGRD Undergraduate
- *Admit Term: 2158 2015 Fall
- Requirement Term: 2158 2015 Fall

- Click on the Student Plan tab. That page appears.

- The bottom part of the page displays one of your academic plans: a major plan, a minor plan (if any) or a college plan. Click View All in that part of the page to see all academic plans at once.

Enter new codes in Requirement Term fields to change the terms for plans or colleges.

Find View 1			
*Academic Plan:	<input type="text" value="CMPSBS"/> Computer Science BS	Declared Major	
*Plan Sequence:	<input type="text" value="1"/>	Degree:	BS
*Declare Date:	<input type="text" value="10/23/2014"/>	Degree Checkout Stat:	
*Requirement Term:	<input type="text" value="2148"/> 2014 Fall	Student Degree Nbr:	
*Advisement Status:	<input type="text" value="Include"/>	Completion Term:	
*Academic Plan:	<input type="text" value="MERRILL"/> Merrill	College	
*Plan Sequence:	<input type="text" value="99"/>	Degree:	
*Declare Date:	<input type="text" value="05/10/2014"/>	Degree Checkout Stat:	
*Requirement Term:	<input type="text" value="2148"/> 2014 Fall	Student Degree Nbr:	
*Advisement Status:	<input type="text" value="Include"/>	Completion Term:	

- Find the plan that you want to change, and enter its new requirement term in the Requirement Term field.
- If the plan you updated has no subplan/concentration, you're done. Click Save.

But if it is a major plan with a concentration, you must also update the concentration requirement term now:

- Click on the Student Sub-Plan tab.
- Find your sub-plan at the bottom of the page, and update the Requirement Term field with a new term code.

Enter a new requirement term for the concentration here.

Find View All		
Academic Plan:	Computer Engineering BS	Declared Major
Requirement Term:	2016 Fall Quarter	
Find View All		
*Academic Sub-Plan:	<input type="text" value="CMPEDIGI"/> Comp Eng Digital Hardware	
Academic Sub-Plan Type:	Concentration	
*Declare Date:	<input type="text" value="10/27/2016"/>	
*Requirement Term:	<input type="text" value="2168"/> 2016 Fall	

- Click Save.

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 uses the same form, but is explained 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 registrar@ucsc.edu 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 update the requirement term 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.