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.

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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 are 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).
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.


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.

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.


7. Click on the Student Plan tab. That page appears.
8. 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.

9. Find the plan that you want to change, and enter its new requirement term in the Requirement Term field.

10. 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:

   a. Click on the Student Sub-Plan tab.

   b. Find your sub-plan at the bottom of the page, and update the Requirement Term field with a new term code.

11. 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.