Program/Plan

Business Process Guide

For Department Staff who change Majors, Minors and Sub plans

August 2008

Arizona State University
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<td>Corrected references to effective dates and removed correct history</td>
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<tr>
<td>12/21/06</td>
<td>Defined difference between Plan change and adding concurrent plan or minor</td>
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<tr>
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<td>Reordered pages 1-3 then renumbered page numbers on entire document. Added/changed content.</td>
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<tr>
<td>8/26/08</td>
<td>Updated pages to remove DOGF requirement</td>
<td>various</td>
</tr>
</tbody>
</table>
Purpose

Use the Student Program/Plan pages to:

- Change a plan
- Change a program and a plan
- Add a minor
- Remove a minor
- Add a sub plan

When you do any of the above, (called entering new program actions), you will enter new effective dates. Thus, you can maintain a history of previous actions, as each action will have a separate date.

The Student Program/Plan pages are also used for program completions such as graduation, however processes related to graduation are documented in a separate document.
Navigation

Log into Peoplesoft by opening a web browser and go to this URL: https://hrsa.oasis.asu.edu
Click on the menu items as follows:

1) Campus Community → Student Services Center

2) Search for a student

ID = Affiliate ID
(ten digits, 1000… or 12000…)

CAMPUS ID = ASU ID
(9 digits – 993…)

National ID = Social Security or tax payer ID.

3) "academics" tab → “edit program data” button.
Prerequisites

Prerequisites and Assumptions
Before you can successfully perform any enrollment action, it is assumed that each of the following conditions has been met.

- You have passed the test in the on-line “FERPA Refresher” course available through blackboard (http://myasucourses.asu.edu).
  
  Click on the “courses” tab, and search for FERPA. Click on the “enroll” button and follow instructions.

- Have attended the instructor-led class “Advisor 201” (register at http://www.asu.edu/hr/training)
  
  OR

  Have completed the online course “Advising 201: Change a Student's Program or Plan (oasis)” available through blackboard (http://myasucourses.asu.edu).
  
  Click on the “courses” tab, and search for Advising. Click on the “enroll” button and follow instructions.

- Have these roles in PeopleSoft:
  ✓ SR Standard Student Pages
  ✓ SR Catalog Schedule View
  ✓ SR Program/ Plan Update

- The student for which you will be performing the enrollment action must have already been admitted and matriculated.

Other Materials Needed

You may need to refer to the following documents/sources:

- An understanding Academic Structure from Advisor101 training. (available in blackboard at http://myasucourses.asu.edu)
Helpful Hints

✓ If you go to the program plan stack via the records and enrollment menu, you must be in Include History mode. If you go there directly from the Student Services center, include history is automatically invoked. If you are not in Include History mode and you attempt to save a Program Change action, you may see the following error (or a similar error):

![Image of error message]

✓ The program or plan change will take effect on the effective date that you set. If the change has impact on advising rules or requisites, (for example, changing a major so that a student can take a class that is only for people in that major), then set the effective date to prior to the semester. Use the best practice dates listed on the next page. You can back-date the effective date when you add a row, but once you save a row you cannot change the effective date so carefully consider the effective date before you save your changes. Effective dates for multiple rows must be in chronological order.

✓ The Admit Term field is now locked by the admissions office.

✓ If you attempt to navigate to a new page without saving after making changes, you will get a warning window that says “You have unsaved data on this page. Click OK to go back and save, or Cancel to continue.” If you want to save your changes you must select OK. If you do not want to save your changes you must select Cancel. This may seem to be the opposite of what you are used to.
Terminology

Program Action: Program Actions are used to make changes to a student’s academic record. The most commonly used Program Actions are PRGC “Program Change” (indicates the student has changed colleges) and PLNC “Plan Change” (indicates the student changed major codes within the same college). Not all staff will have access to all Program Actions.

Program Action Reasons: Used to further define Program Actions.

Effective Date: The majority of data in OASIS can be effective dated to capture the history of changes over time (e.g. all major changes). The effective date is very important in the program/plan pages because the system will not recognize a program action for a term that has an effective date that is after the first day of the term, and this will have an impact on reporting and on enrollment requirements (course prerequisites) and advising requirements.

Best Practice Dates: Use these Best Practice Dates for effective dating, unless the Best Practice Date for the semester you want the program/plan change to be effective has not yet passed. If the Best Practice Date has not yet passed then accept the default of today’s date.

- Fall: August 1
- Winter: December 1
- Spring: January 1
- Summer (all sessions): May 1

Change of Major: If the new plan (major) is within the same Academic Program (college) as the plan (major) that is already on the system, then use the process for a Plan Change (see page 13). If the new plan (major) is within a different Academic Program (college) than the plan (major) that is already on the system, then use the process for a Program Change.

Change of Minor: This is a Plan Change action. Use the process to Add a Minor or Concurrent Degree.

Concurrent Degree: These must be petitioned for. As a result, the graduation office will handle concurrent degrees.
Student Career Nbr: Differentiates multiple academic programs within the same academic career. The default value is zero. For students with multiple academic careers, you can keep the default value. For students with multiple academic programs within the same academic career, you must select a unique academic career number for each academic program that you add. The lowest career number designates the student’s primary academic program within the academic career. When a new program is added, the Student Career Number is increased by one. When a program is changed, the Student Career Number does not change.

Status: Indicates the high-level relationship that the student has with the academic program specified on a given row as of the effective date of the row. The program status must be Active in Program for the student to enroll.

Effective Date: This is the date on which the program action and the other field values on the row become effective. If the change has impact on advising rules or requisites, (for example, changing a major so that a student can take a class that is only for people in that major), then set the effective date to prior to the semester. Use the best practice dates listed on previous pages.

Effective Sequence: This field increases by one when multiple changes are made on the same day. This allows history to be stored and viewed in sequential order.

Program Action: See the Program Action Table later in this document.

Action Date: The date that the program action was executed. It can be different from the effective date. The system records and displays the action date for tracking purposes.

Action Reason: Indicates why a particular program action was taken or offers a further description of the program action.

Admit Term: The admit term is entered by the admissions office. It is locked to further edits.

Requirement Term: This is the catalog year. You can adjust it as needed.

Expected Grad Term: The term in which the student expects to graduate from the specified academic program. The field value will appear only after the student applies for graduation.

Campus: The campus on which the student will be active in the specified academic program.
"Student Plan" Tab - Page Elements

Academic Plan: A valid academic plan is required to activate a student into a term. A student can have multiple academic plans within an academic program.

Plan Sequence: The sequence in which degree progress evaluates a student’s academic plans. The system increments the plan sequence number each time that you add an academic plan. You can override this value.

Degree: The degree associated with the academic plan.

Declare Date: The date that the student declares the academic plan. The system, by default, displays a date equal to the effective date of the latest program action with a status of Active in Program. You can override this value.

Degree Checkout Stat: The system displays the degree checkout status when the student has applied to graduate.

Requirement Term: This is the catalog year. The field can be updated manually.

Student Degree Nbr: The system displays this number sequentially once you complete the graduation process. This number also indicates the printing order if multiple degrees are conferred on the same date.

Advisement Status: Determines how the advisement engine processes the academic requirements groups that you have linked to the student’s program structure. Select from the following options an academic advisement status for the student:

- Include: All requirement groups that match this structure are pulled into an audit.
- Not Include: All requirement groups that match this structure are not pulled into an audit.
- Optional: Pulls in requirement groups that match this structure, but will not prevent the overall audit from going complete if unsatisfied.
### List of Program Actions for Department Staff:

<table>
<thead>
<tr>
<th>Program Action</th>
<th>Explanation/Use</th>
<th>System Updates Program Status To</th>
<th>Additional Steps Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLNC (Plan Change)</td>
<td>Use to change the plan within the same career and program, to add a minor, or when the student has been approved to pursue concurrent degrees and the new degree program is in the same program as the current degree program that is already on the system, delete a concurrent plan the student no longer wishes to pursue.</td>
<td>No status effect.</td>
<td>None</td>
</tr>
<tr>
<td>PRGC (Program Change)</td>
<td>Use to change the program and plan within the same career.</td>
<td>No status effect.</td>
<td>None</td>
</tr>
</tbody>
</table>

### List of Program Actions for Registrar, Graduation and Admission Offices:

<table>
<thead>
<tr>
<th>Program Action</th>
<th>Explanation/Use</th>
<th>System Updates Program Status To</th>
<th>Additional Steps Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTV (Activate)</td>
<td>A student is ready either to enroll in a term, or has been approved to pursue concurrent degrees and the new degree program is in a different program than the current degree program that is already on the system.</td>
<td>Activate</td>
<td>None</td>
</tr>
<tr>
<td>ADRV (Admission Revocation)</td>
<td>ASU does not plan to use this.</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>COMP (Completion of Program)</td>
<td>A student has completed the program.</td>
<td>Program Complete</td>
<td>If the student is ready for graduation processing, complete the graduate process on the Student Degrees page. If the student is enrolled in future classes you may need to activate the student in a nondegree-seeking program (see the Graduation BPG). If the student is not enrolled in future classes uncheck the Eligible to Enroll box on the Term Activation page.</td>
</tr>
<tr>
<td>DEFR (Defer Enrollment)</td>
<td>Graduate career only - a student has been admitted, and may be active for one admit term, but will actually enroll in a later admit term. This action lets you change the admit term for the applicant and record that they are deferring enrollment.</td>
<td>The last action's program status.</td>
<td>None</td>
</tr>
<tr>
<td>Program Action</td>
<td>Explanation/Use</td>
<td>System Updates Program Status To</td>
<td>Additional Steps Required</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>---------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>DGAP (Declaration of Graduation)</td>
<td>The student has submitted a declaration of Graduation</td>
<td>Declaration of Graduation</td>
<td>Contact the Graduation office prior to making any other actions if this is the top row.</td>
</tr>
<tr>
<td>DISC (Discontinuation)</td>
<td>A student decides not to pursue a concurrent degree, and that Plan was the student’s only active Plan in a particular Program, or Term withdrawal prior to the beginning of the term.</td>
<td>Discontinued</td>
<td>For term withdrawal, recalculate tuition before you post the discontinuation.</td>
</tr>
<tr>
<td>DISM (Dismissal)</td>
<td>A student is disqualified for academic reasons.</td>
<td>Dismissed</td>
<td>If the student is enrolled in future classes post the withdrawal on the student Withdrawal page, uncheck the Eligible to Enroll box on the Term Activation page, and add a negative Service Indicator.</td>
</tr>
<tr>
<td>LEAV (Leave of Absence)</td>
<td>A student is approved to take a leave of absence (may be used for military activation).</td>
<td>Leave of Absence</td>
<td>Add a RLOA action for the Term the student plans to return. If the student is enrolled in future classes post the withdrawal on the student Withdrawal page, and uncheck the Eligible to Enroll box on the Term Activation page.</td>
</tr>
<tr>
<td>MATR (Matriculation)</td>
<td>A person has completed all necessary steps to become an active student in an academic program.</td>
<td>Active</td>
<td>Activate the student into the academic program.</td>
</tr>
<tr>
<td>RADM (Readmit)</td>
<td>Use to reactivate a student after Dismissal or an Administrative Withdrawal when the student has not skipped a fall or spring semester.</td>
<td>Active</td>
<td>Activate the student on the Term Activation page, and remove any negative Service Indicators related to the Dismissal or Administrative Withdrawal.</td>
</tr>
<tr>
<td>REVK (Revoke Degree)</td>
<td>Revoke a student’s degree. The system automatically updates the student degree tables. Revoked degrees do not appear on the student transcript.</td>
<td>Active</td>
<td>Activate the student on the Term Activation page.</td>
</tr>
<tr>
<td>RLOA (Return from Leave of Absence)</td>
<td>A student returns from an approved leave of absence.</td>
<td>Active</td>
<td>Activate the student on the Term Activation page.</td>
</tr>
<tr>
<td>SPND (Suspension)</td>
<td>ASU does not plan to use this.</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>TRAN (Transfer to Other Career)</td>
<td>ASU does not plan to use this.</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>WADM (Administrative Withdrawal)</td>
<td>A student is withdrawn for a Medical/compassionate withdrawal, disciplinary hold, death, or duplicate records, and will be prevented from future enrollment until further action is taken (may include military activation).</td>
<td>Canceled</td>
<td>If the student is enrolled in future classes post the withdrawal on the Term History page, uncheck the Eligible to Enroll box on the Term Activation page, and add a negative Service Indicator (if applicable).</td>
</tr>
</tbody>
</table>
Procedure

Change a Plan

This procedure is for changing the major or minor (called a plan in PeopleSoft) of a student in the same program. (Plan= major, Program = department + career)

Path: Open your web browser (Internet Explorer or Mozilla Explorer). Login to PeopleSoft at https://hrsa.oasis.asu.edu

Navigate through these menus:
Campus Community -> Student Services Center

Step 1 Input the data you know about the student.

<table>
<thead>
<tr>
<th>Student Services Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter any information you have and click Search. Leave fields blank for a list of all values.</td>
</tr>
<tr>
<td>Find an Existing Value</td>
</tr>
<tr>
<td>ID:</td>
</tr>
<tr>
<td>Campus ID:</td>
</tr>
<tr>
<td>National ID:</td>
</tr>
<tr>
<td>Last Name:</td>
</tr>
<tr>
<td>First Name:</td>
</tr>
<tr>
<td>Case Sensitive</td>
</tr>
<tr>
<td>Search Clear Basic Search Save Search Criteria</td>
</tr>
</tbody>
</table>

ID = Affiliate ID (ten digits, 1000… or 1200….)

CAMPUS ID = ASU ID (9 digits – 993….)

National ID = Social Security or tax payer ID.

Step 3 Click “Search” If only one record matches your search criteria, you will be brought directly to that record. If the student has more than one program you will see each in the search results, but you won’t know which program the student is active in, you must open each record to determine that. Keep in mind that the student may be active in more than one program within the same career.

Step 4 Click on the “Academics” tab. It shows the current academic record of the student.
Step 5  Click on the “edit program data” button.

Step 6  Check that the student is ready for a plan change:
- Check that the student has a status of “Active in the Program”
- Check that the “Program Action” is NOT “Data” AND
  - The “Action Reason” is NOT DGAP (applied to graduate) or
  - The “Action Reason” is NOT DISC (discontinued)

If you find a DGAP role, contact the graduation office for help. If you encounter a DISC row, contact the registrar’s office.

Note: A full list of Program actions and action reasons are available earlier in this document.

Note: There may be a “Data” row with an “Action Reason” of DOGF. This has been discontinued, but rows may be left over from the previous data. It is ok to change the plan if you encounter a “DOGF” row.
Step 6  Select the + to add a new effective-dated row.

Step 7  Enter or update these fields:

Notes about each field are on the next page.
Effective Date

Accept the default of today’s date, or assign a different date.

If the program action must be effective for the current term and the term has already begun, then enter the date of the first day of the current term. Once you save a row you cannot change the effective date so carefully consider the effective date before you save your changes.

**Best Practice Dates:** Use these Best Practice Dates for effective dating, unless the Best Practice Date for the semester you want the program/plan change to be effective has not yet passed. If the Best Practice Date has not yet passed then accept the default of today’s date.

- **Fall:** August 1
- **Winter:** December 1
- **Spring:** January 1
- **Summer (all sessions):** May 1

Program Action

**PLNC (Plan Change)**

**Note:** If you see the message below (the student has applied to graduate) stop immediately, do not process the change, and contact the Graduation office.

Action Reason

Enter the Action Reason code, or select and choose one from the list. Most often, choose “Student Request” (**STRQ**).

Requirement Term

The requirement term is the catalog year. It can be set for each program and plan.

Campus

Enter the campus on which the student will be active in the new academic plan, or select and choose one from the list.
Step 8  Click on the "Student Plan" tab.

Step 9  Update these fields:

Academic Plan  Type the new Academic Plan over the old plan displayed on the page, or select ☑️ and choose the new plan from the list.

Requirement Term  Enter the same Term as the Requirement Term on the Student Program tab.

Step 10  Click on “Save“
Change a Program and Plan

This procedure is for changing the major or minor of a student in a different program. (plan=major, program=department + career)

**Path:** Open your web browser (Internet Explorer or Mozilla Explorer).
Login to PeopleSoft at [https://hrsa.oasis.asu.edu](https://hrsa.oasis.asu.edu)

**Navigate** through these menus:
Campus Community -> Student Services Center

**Step 1** Input the data you know about the student.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Affiliate ID (ten digits, 1000… or 12000….)</td>
</tr>
<tr>
<td>Campus ID</td>
<td>ASU ID (9 digits – 993….)</td>
</tr>
<tr>
<td>National ID</td>
<td>Social Security or tax payer ID.</td>
</tr>
</tbody>
</table>

**Step 3** Click “Search” If only one record matches your search criteria, you will be brought directly to that record. If the student has more than one program you will see each in the search results, but you won’t know which program the student is active in, you must open each record to determine that. Keep in mind that the student may be active in more than one program within the same career.

**Step 4** Click on the “Academics” tab. It shows the current academic record of the student.
Step 5  Click on the “edit program data” button.

Step 6  Check that the student is ready for a plan change:
  •  Check that the student has a status of “Active in the Program”
  •  Check that the “Program Action” is NOT “Data” AND
    o  The “Action Reason” is NOT DGAP (applied to graduate) or
    o  The “Action Reason” is NOT DISC (discontinued)

If you find a DGAP role, contact the graduation office for help. If you encounter a DISC row, contact the registrar’s office.

Note: A full list of Program actions and action reasons are available earlier in this document.

Note: There may be a “Data” row with an “Action Reason” of DOGF. This has been discontinued, but rows may be left over from the previous data. It is ok to change the plan if you encounter a “DOGF” row.
Step 6  Select the + to add a new effective-dated row.

Step 7  Enter or update these fields:

Notes about each field are on the next page.
Effective Date

Accept the default of today’s date, or assign a different date.

If the program action must be effective for the current term and the term has already begun, then enter the date of the first day of the current term. Once you save a row you cannot change the effective date so carefully consider the effective date before you save your changes.

**Best Practice Dates:** Use these Best Practice Dates for effective dating, unless the Best Practice Date for the semester you want the program/plan change to be effective has not yet passed. If the Best Practice Date has not yet passed then accept the default of today’s date.

- Fall: August 1
- Winter: December 1
- Spring: January 1
- Summer (all sessions): May 1

Program Action

**PRGC (Program Change)**

**Note:** If you see the message below (the student has applied to graduate) stop immediately, do not process the change, and contact the Graduation office.

Action Reason

Enter the Action Reason code, or select \(\text{Strq}\) and choose one from the list. Most often, choose “Student Request” (STRQ)

Requirement Term

The requirement term is the catalog year. It can be set for each program and plan.

Academic Program:

Put in the new academic program for the student. You can click on the magnifying glass to select from a list.

Campus

Enter the campus on which the student will be active in the new academic plan, or select \(\text{Strq}\) and choose one from the list.
Step 8 Click on the “Student Plan” tab.

Step 9 Update these fields: Note that, because you have changed programs, these two fields will be blank.

**Academic Plan**
Type in the new Academic Plan, or select and choose the new plan from the list.

**Requirement Term**
Enter the same Term as the Requirement Term on the Student Program tab.

Step 10 Click on “Save”
Add a Minor
This procedure is for adding a minor for a student. Minors are independent of programs. (plan=major, program=department + career)

Open your web browser (Internet Explorer or Mozilla Explorer).
Login to PeopleSoft at https://hrsa.oasis.asu.edu

Navigate through these menus:
Campus Community -> Student Services Center

**Step 1** Input the data you know about the student.

```
Student Services Center
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID = Affiliate ID
(ten digits, 1000… or 12000….)

CAMPUS ID = ASU ID
(9 digits – 993….)

National ID = Social Security or taxpayer ID.
```

**Step 3** Click “Search” If only one record matches your search criteria, you will be brought directly to that record. If the student has more than one program you will see each in the search results, but you won’t know which program the student is active in, you must open each record to determine that. Keep in mind that the student may be active in more than one program within the same career.

**Step 4** Click on the “Academics” tab. It shows the current academic record of the student.

```
Emily PlanChange

ID: 1000000000
```

Program: UGAL Liberal Arts & Sciences
Student Career Nbr: 0
Status: Active as of 08/20/2009
Admit Term: 2007 Fall
Expected Graduation: Full-Time
Approved Load: Base On Units
Load Determination: Base On Units
Level Determination: Base On Units
Plan: LAPA855 Family & Human Development
Requirement Term: 2006 Fall
Step 5  Click on the “edit program data” button.

Step 6  Check that the student is ready for a plan change:
• Check that the student has a status of “Active in the Program”
• Check that the “Program Action” is NOT “Data” AND
  o The “Action Reason” is NOT DGAP (applied to graduate) or
  o The “Action Reason” is NOT DISC (discontinued)
If you find a DGAP role, contact the graduation office for help. If you encounter a DISC row, contact the registrar’s office.

Note: A full list of Program actions and action reasons are available earlier in this document.

Note: There may be a “Data” row with an “Action Reason” of DOGF. This has been discontinued, but rows may be left over from the previous data. It is ok to change the plan if you encounter a “DOGF” row.
Step 6  Select the + to add a new effective-dated row.

Step 7  Enter or update these fields:

Notes about each field are on the next page.
Effective Date

Accept the default of today’s date, or assign a different date.

If the program action must be effective for the current term and the term has already begun, then enter the date of the first day of the current term. Once you save a row you cannot change the effective date so carefully consider the effective date before you save your changes.

**Best Practice Dates:** Use these Best Practice Dates for effective dating, unless the Best Practice Date for the semester you want the program/plan change to be effective has not yet passed. If the Best Practice Date has not yet passed then accept the default of today’s date.

- Fall: August 1
- Winter: December 1
- Spring: January 1
- Summer (all sessions): May 1

Program Action

PLNC (Plan Change)

**Note:** If you see the message below (the student has applied to graduate) stop immediately, do not process the change, and contact the Graduation office.

### Action Reason

Enter the Action Reason code, or select and choose one from the list. Most often, choose “Student Request” (STRQ)

### Requirement Term

The requirement term is the catalog year. It can be set for each program and plan.

### Campus

Enter the campus on which the student will be active in the new academic plan, or select and choose one from the list.
Step 8  Click on the “Student Plan” tab.

Step 9  Click on the + sign to add a new blue row.

Step 10 Update these fields in the new row. (notice that there are now 2 blue rows)

Requirement Term  Enter the Requirement Term for the minor.

Academic Plan  Type the in the minor or select ▼ and choose the new plan from the list.

Step 11  Click on “Save”

Note:  You will have 2 (or more) active Academic Plans when you are finished, and the second blue strip on this page, which is immediately above the Academic Plan field, will show “# of 2” (or more) rows.
Delete a Minor

This procedure is for deleting a minor for a student. Minors are independent of programs. (plan=major, program=department + career)

Open your web browser (Internet Explorer or Mozilla Explorer). Login to PeopleSoft at https://hrsa.oasis.asu.edu

Navigate through these menus:
Campus Community -> Student Services Center

**Step 1** Input the data you know about the student.

```
Student Services Center
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>begins with</td>
</tr>
<tr>
<td>Campus ID</td>
<td>begins with</td>
</tr>
<tr>
<td>National ID</td>
<td>begins with</td>
</tr>
<tr>
<td>Last Name</td>
<td>begins with</td>
</tr>
<tr>
<td>First Name</td>
<td>begin with</td>
</tr>
</tbody>
</table>

Case Sensitive

| Search | Clear | Basic Search | Save Search Criteria |
```

**ID =** Affiliate ID
(ten digits, 1000… or 12000….)

**CAMPUS ID =** ASU ID
(9 digits – 993….)

**National ID =** Social Security or tax payer ID.

**Step 3** Click “Search” If only one record matches your search criteria, you will be brought directly to that record. If the student has more than one program you will see each in the search results, but you won’t know which program the student is active in, you must open each record to determine that. Keep in mind that the student may be active in more than one program within the same career.

**Step 4** Click on the “Academics” tab. It shows the current academic record of the student.
Step 5  
Click on the “edit program data” button.

Step 6  
Check that the student is ready for a plan change:

- Check that the student has a status of “Active in the Program”
- Check that the “Program Action” is NOT “Data” AND
  - The “Action Reason” is NOT DGAP (applied to graduate) or
  - The “Action Reason” is NOT DISC (discontinued)

If you find a DGAP role, contact the graduation office for help. If you encounter a DISC row, contact the registrar’s office.

**Note:** A full list of Program actions and action reasons are available earlier in this document.

**Note:** There may be a “Data” row with an “Action Reason” of DOGF. This has been discontinued, but rows may be left over from the previous data. It is ok to change the plan if you encounter a “DOGF” row.
Step 7  Select the + to add a new effective-dated row. (even though you are deleting a minor – you must ADD a new effective-dated row so that the history is maintained.)

Step 8  Enter or update these fields:

Notes about each field are on the next page.
Effective Date

Accept the default of today’s date, or assign a different date.

If the program action must be effective for the current term and the term has already begun, then enter the date of the first day of the current term. Once you save a row you cannot change the effective date so carefully consider the effective date before you save your changes.

**Best Practice Dates:** Use these Best Practice Dates for effective dating, unless the Best Practice Date for the semester you want the program/plan change to be effective has not yet passed. If the Best Practice Date has not yet passed then accept the default of today’s date.

- Fall: August 1
- Winter: December 1
- Spring: January 1
- Summer (all sessions): May 1

Program Action

**PLNC (Plan Change)**

**Note:** If you see the message below (the student has applied to graduate) stop immediately, do not process the change, and contact the Graduation office.

![Microsoft Internet Explorer](image)

**Action Reason**
Enter the Action Reason code, or select [ ] and choose one from the list. Most often, choose “Student Request” (STRQ)

**Requirement Term**
The requirement term is the catalog year. It can be set for each program and plan.

**Campus**
Enter the campus on which the student will be active in the new academic plan, or select [ ] and choose one from the list.
Step 9  Click on the “Student Plan” tab.

Step 10  Navigate to the correct blue row, then click the – sign to delete the minor.

Step 11  Click on “Save“
Add a Sub Plan

This procedure is for adding a sub plan for a student. Subplans are areas of concentrations. SubPlans are NOT certificates. (plan=major, program=department + career)

Open your web browser (Internet Explorer or Mozilla Explorer). Login to PeopleSoft at https://hrsa.oasis.asu.edu

Navigate through these menus:
Campus Community -> Student Services Center

Step 1 Input the data you know about the student.

<table>
<thead>
<tr>
<th>ID</th>
<th>Affiliate ID (ten digits, 1000… or 12000….)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus ID</td>
<td>ASU ID (9 digits – 993…. )</td>
</tr>
<tr>
<td>National ID</td>
<td>Social Security or tax payer ID.</td>
</tr>
</tbody>
</table>

Step 3 Click “Search” If only one record matches your search criteria, you will be brought directly to that record. If the student has more than one program you will see each in the search results, but you won’t know which program the student is active in, you must open each record to determine that. Keep in mind that the student may be active in more than one program within the same career.

Step 4 Click on the “Academics” tab. It shows the current academic record of the student.
Step 5  Click on the “edit program data” button.

Step 6  Check that the student is ready for a plan change:
- Check that the student has a status of “Active in the Program”
- Check that the “Program Action” is NOT “Data” AND
  - The “Action Reason” is NOT DGAP (applied to graduate) or
  - The “Action Reason” is NOT DISC (discontinued)

If you find a DGAP role, contact the graduation office for help. If you encounter a DISC row, contact the registrar’s office.

Note: A full list of Program actions and action reasons are available earlier in this document.

Note: There may be a “Data” row with an “Action Reason” of DOGF. This has been discontinued, but rows may be left over from the previous data. It is ok to change the plan if you encounter a “DOGF” row.
Step 6  Select the + to add a new effective-dated row.

Step 7  Enter or update these fields:

Notes about each field are on the next page.
**Effective Date**

Accept the default of today’s date, or assign a different date.

If the program action must be effective for the current term and the term has already begun, then enter the date of the first day of the current term. Once you save a row you cannot change the effective date so carefully consider the effective date before you save your changes.

**Best Practice Dates:** Use these Best Practice Dates for effective dating, unless the Best Practice Date for the semester you want the program/plan change to be effective has not yet passed. If the Best Practice Date has not yet passed then accept the default of today’s date.

- **Fall** August 1
- **Winter** December 1
- **Spring** January 1
- **Summer (all sessions)** May 1

**Program Action**

**PLNC (Plan Change)**

**Note:** If you see the message below (the student has applied to graduate) stop immediately, do not process the change, and contact the Graduation office.

<table>
<thead>
<tr>
<th>Microsoft Internet Explorer</th>
</tr>
</thead>
<tbody>
<tr>
<td>!</td>
</tr>
<tr>
<td>!</td>
</tr>
<tr>
<td>OK</td>
</tr>
</tbody>
</table>

**Action Reason**

Enter the Action Reason code, or select and choose one from the list.

Most often, choose “Student Request” (STRQ)

**Requirement Term**

The requirement term is the catalog year. It can be set for each program and plan.

**Campus**

Enter the campus on which the student will be active in the new academic plan, or select and choose one from the list.
Step 8  Click on the “Student Sub Plan” tab.

Step 9  Update these fields in the new row.

Requirement Term: Enter the Requirement Term for the minor. 
Academic Sub Plan: Type the in the minor or select and choose the new plan from the list.

Step 10  Click on “Save“
Note: Gripping text here about how advisors can see lists of their sup plans.
Notes on Concurrent Degrees and Certificates

As of December 2007, Concurrent Degrees and Certificates are still being handled directly by the Registrar office. If you need to set up either a concurrent degree or a certificate, please contact the Registrar’s office.
Results

Using this Business Process Guide, you should be able to obtain the following results:

- Change a plan
- Change a program and plan
- Add a Minor
- Delete a Minor
- Add a Sub Plan