Program/Plan Cheat Sheet for Advisors (rev. 10/24/2013)

NOTE:
- Must select "Include History" button BEFORE making any program/plan changes
- Effective date for plan changes/additions should be the current date. Exception: The date should be the first day of the current term if the term has already started and you want the change effective for the current term. If the term has started and you use a current effective date instead of the first day of the current term, then (1) student will NOT show up with the new plan/sub plan on the advisee rosters until the end of the current term, (2) student will not be recognized in the major/minor report under new plan/sub plan for the current term, and (3) student will not meet any class restrictions for enrollment for the current term based on the new plan/sub plan.
- Requirement term should be the term associated with the term the major (or other plan type) was declared. See the last page for more on requirement terms.

PLANS

Change a Plan – for students who are changing from one plan (major) to another within the same program (changing from HIST-BA to PSYC-BA for example)

1. Program page:
   – add a row
   – enter appropriate effective date
   – Program Action = Plan Change (PLNC)
   – Action Reason = Major (MAJR)

2. Plan page:
   – don't add a row, just change the existing plan to the new plan
   – update the plan requirement term associated with the requirements for the plan (for example the PSYC-BA requirements the student should be audited by in the degree audit)

3. "SAVE"

Add an Additional Plan – for students who want to pursue an additional plan (major) (student has plan of HIST-BA but wants to add an additional plan of ENGL for example)

1. Program page:
   – add a row
   – enter appropriate effective date
   – Program Action = Plan Change (PLNC)
   – Action Reason = Major (MAJR)

2. Plan page:
   – add a row and enter the appropriate additional plan
   – update the plan requirement term associated with the requirements for the plan (for example the ENGL-ADL requirements the student should be audited by in the degree audit)

3. "SAVE"

Remove an Additional Plan – for students who want to remove one of their plans (majors) pursue an additional plan (major) (student has plan of HIST-BA and ENGL-ADL but wants to remove the ENGL plan)

1. Program page:
   – add a row
   – enter appropriate effective date
   – Program Action = Plan Change (PLNC)
   – Action Reason = Removed Additional Major (RADL)

2. Plan page:
   – delete the row (click on the minus symbol) for the additional plan you want to remove

3. "SAVE"

Change Additional Plan to Degree Carrying Plan – for students who no longer want the indicated degree carrying plan but want to make the additional major the degree carrying major (student has plan of HIST-BA and ENGL-ADL but doesn't want HIST-BA any longer so ENGL-ADL needs to be changed to the degree carrying plan)

1. Program page:
   – add a row
   – enter appropriate effective date
   – Program Action = Plan Change (PLNC)
   – Action Reason = Major Change (MAJR)

2. Plan page:
   – note the requirement term for the additional major. Also see if there are any sub plans for the additional major (on the sub plan tab) and make note of that as well
   – delete (click on the minus symbol) for the additional plan
   – change the degree carrying plan to the plan that was the additional plan and enter the requirement term you noted above (and enter the sub plan, if appropriate, on the sub plan tab with the requirement term noted above)
   – verify the plan requirement term is still the term associated with the requirements for the plan (for example the same term as originally listed for the ENGL-ADL, this will be the requirements the student should be audited by in the degree audit)

3. "SAVE"

Add/Remove/Change a Minor or Certificate – follow same procedures as those listed previously for adding/removing/changing plans

1. Program page:
   – add a row
   – enter appropriate effective date
   – Program Action = Plan Change (PLNC)
   – Action Reason = Certificate (CERT) if adding, removing or changing a certificate plan
   = Minor (MINR) if adding or changing a minor plan
   = Removed Minor (RMNR) if removing a minor plan

2. Plan page:
   – make the appropriate changes on the Plan page following the same procedures as those listed previously for adding/removing/changing plans

3. "SAVE"

SUB PLANS

Add a Sub Plan – for students who are adding a sub plan (option) to their plan (major) (adding sub plan of Biochemistry to CHEM plan for example)

1. Program page:
   – add a row
   – enter appropriate effective date
   – Program Action = Plan Change (PLNC)
   – Action Reason = Subplan (SUPL)

2. Sub Plan page:
   – add the appropriate sub plan to the appropriate plan; if a sub plan already exists for that plan and you want to add another sub plan for that plan, then add a row

3. "SAVE"

Change a Sub Plan – for students who want to change a sub plan associated with a plan to a different sub plan (for example, student has plan of ASEN-BS with sub plan of Bioengineering and wants to change the sub plan to Biomedical Engineering)

1. Program page:
   – add a row
   – enter appropriate effective date
   – Program Action = Plan Change (PLNC)
   – Action Reason = Subplan (SUPL)

2. Sub Plan page:
   – don't add a row, just change the sub plan

3. "SAVE"

Remove a Sub Plan – for students who want to remove a sub plan (option) that's associated with their plan (major) (removing sub plan of Biochemistry from the CHEM plan for example)

1. Program page:
   – add a row
   – enter appropriate effective date
   – Program Action = Plan Change (PLNC)
   – Action Reason = Removed Subplan (RSPL)

2. Sub Plan page:
   – delete the row (click on the minus symbol) for the sub plan you want to remove

3. "SAVE"

REQUIREMENT TERMS

Change Program or Plan or Subplan Requirement Term – for students who need to have the requirement term on their program, plan, and/or subplan changed or corrected

1. Program page:
   – add a row
   – enter appropriate effective date
   – Program Action = Data Change (DATA)
   – Action Reason = Requirement Term (REQT)

2. Plan page:
   – change the requirement term on the program or the appropriate plan (or change on the Sub Plan page if it's related to a sub plan)

3. "SAVE"

In general, the requirement terms will be associated with the following:
Career Requirement Term = Will indicate when the student first enters UCB as a degree seeking student for that career. This will be used by some colleges in IUT or other cases where portions of the degree audit requirements should be based upon the student's entry to UCB.

Program Requirement Term = Will indicate when the student first enters the program or college. This will be the main requirement term used for the degree audit. The overall requirements of the degree audit are typically based upon this requirement term.

Plan Requirement Term = Will indicate the requirements for the plan (major, minor, certificate, etc.) the student should follow. This will typically be either the same as the program requirement term or the term when the student declares the plan.

For example, a Journalism student may have the following requirement terms:

Undergraduate Career Requirement Term	=2107 (entering as a Freshman in Fall 2010)
Journalism Program Requirement Term	=2121(accepted to Journalism in Spring 2012)
Journalism Plan Requirement Term	=2121 (accepted in Advertising Spring 2012)