Program/Plan Cheat Sheet for Advisors

NOTES

- Click the **Include History** button <u>before</u> making any program/plan changes.

- Setting the **Effective Date** of plan changes/additions:

  o Before the term begins, use the current date.

  o After the term begins, use the first day of the term. If you incorrectly use the current date, the student will not 1) show up on the new plan/subplan on the advisee rosters until the end of the current term, 2) be recognized in the major/minor report under the new plan/subplan for the current term, or 3) meet any class restrictions for enrollment for the current term based on the new plan/subplan.

- Setting the **Requirement Term**: Use the term associated with the term the major (or other plan type) was declared. See the last page of this document for more information.

REQUIREMENT TERMS

1. **About Requirement Terms:**

   - **Career Requirement Term:** Indicates when the student first entered CU-Boulder as a degree-seeking student for that career. Used by some colleges in IUT or other cases where portions of the degree audit requirements should be based on the date of entry into CU-Boulder.

   - **Program Requirement Term:** Indicates when the student first entered the program or college. The overall requirements of the degree audit are typically based on this requirement term.

   - **Plan Requirement Term:** Indicates the requirements for the plan (major, minor, certificate, etc.) the student should follow. Typically either the same as the **Program Requirement Term** or the term when the student declared the plan.

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

   - **Undergraduate Career Requirement Term:**   **2107**
     Entered as a freshman in Fall 2010.

   - **Journalism Program Requirement Term:**   **2121**
     Accepted to Journalism in Spring 2012.

   - **Journalism Plan Requirement Term:**   **2121**
     Accepted to Advertising in Spring 2012.

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

   a. **Program** page:

      i. Add a row.

      ii. Enter appropriate effective date (see second bullet under NOTES section, above).

      iii. **Program Action**: **Data Change (DATA)**.

      iv. **Action Reason**: **Requirement Term (REQT)**.

b. **Plan/Subplan** page: Change the program or plan requirement term on the **Plan** page. Change the subplan requirement term on the **Subplan** page.

c. Click the **Save** button.

PLANS

1. <u>**Change a Plan:**</u> Use for students who are changing from one plan (major) to another within the same program (e.g., HIST-BA to PSYC-BA).

   a. **Program** page:

      i. Add a row.

      ii. Enter appropriate effective date (see second bullet under NOTES section, above).

      iii. **Program Action**: **Plan Change (PLNC)**.

      iv. **Action Reason**: **Major (MAJR)**.

   b. **Plan** page:

      i. Don't add a row; just change the existing plan to the new plan.

      ii. Update the plan requirement term associated with the requirements for the plan (e.g., the PSYC-BA requirements to use in the student's degree audit).

   c. Click the **Save** button.

2. <u>**Add an Additional Plan:**</u> Use for students who want to pursue an additional plan (major) (e.g., student has a plan of HIST-BA, but wants to add an additional plan of ENGL).

   a. **Program** page:

      i. Add a row.

      ii. Enter appropriate effective date (see second bullet under NOTES section, above).

      iii. **Program Action**: **Plan Change (PLNC)**.

      iv. **Action Reason**: **Major (MAJR)**.

   b. **Plan** page:

      i. Add a row, then enter the appropriate additional plan.

      ii. Update the plan requirement term associated with the requirements for the plan (e.g., the ENGL-ADL requirements to use in the student's degree audit).

   c. Click the **Save** button.

3. <u>**Remove an Additional Plan**</u>: Use for students who want to remove one of their plans (majors) (e.g., student has a plan of HIST-BA and ENGL-ADL, but wants to remove the ENGL plan).

   a. **Program** page:

      i. Add a row.

      ii. Enter appropriate effective date (see second bullet under NOTES section, above).

      iii. **Program Action**: **Plan Change (PLNC)**.

      iv. **Action Reason**: **Removed Additional Major (RADL)**.

   b. **Plan** page: Click the minus symbol (-) to delete the row for the additional plan.

   c. Click the **Save** button.

4. **Change an Additional Plan to a Degree-Carrying Plan**: Use for students who no longer want the indicated degree-carrying plan, and want to make the additional major the degree-carrying plan (e.g., student has a plan of HIST-BA and ENGL-ADL, but no longer wants HIST-BA, so ENGL-ADL needs to become the degree-carrying plan).

   a. **Program** page:

      i. Add a row.

      ii. Enter appropriate effective date (see second bullet under NOTES section, above).

      iii. **Program Action**: **Plan Change (PLNC)**.

      iv. **Action Reason**: **Major Change (MAJR)**.

   b. **Plan** page:

      i. Note the requirement term for the additional major. Also see if there are any subplans for the additional major (on the subplan tab) and make note of that as well.

      ii. Click the minus symbol (-) to delete the row for the additional plan.

      iii. Change the degree-carrying plan to the plan that was the additional plan.

      iv. Enter the requirement term you noted above.

      v. Verify the plan requirement term is still the term associated with the requirements for the plan (e.g., the same term originally listed for ENGL-ADL; these will be the requirements to use in the student's degree audit).

   c. Click the **Save** button.

5. **Add/Remove/Change a Minor or Certificate**.

   a. **Program** page:

      i. Add a row.

      ii. Enter appropriate effective date (see second bullet under NOTES section, above).

      iii. **Program Action**: **Plan Change (PLNC)**.

      iv. **Action Reason**:

         1. **Certificate (CERT)**: Use if adding, removing or changing a certificate plan.

         2. **Minor (MINR)**: Use if adding or changing a minor plan.

         3. **Removed Minor (RMNR)**: Use if removing a minor plan.

   b. **Plan** page: Follow the procedures listed previously for adding/removing/changing plans.

   c. Click the **Save** button.

SUBPLANS

1. **Add a Subplan:** Use for students who are adding a subplan (option) to their plan (major) (e.g., adding a subplan of Biochemistry to a CHEM plan).

   a. **Program** page:

      i. Add a row.

      ii. Enter appropriate effective date (see second bullet under NOTES section, above).

      iii. **Program Action**: **Plan Change (PLNC)**.

      iv. **Action Reason**: **Subplan (SUPL)**.

b. **Subplan** page: Add the appropriate subplan to the appropriate plan. If a subplan already exists for that plan and is not being replaced, then add a row for the new subplan.

c. Click the **Save** button.

2. <u>**Change a Subplan**</u>: Use for students who want to change an existing subplan associated with a plan to a different subplan (e.g., student has a plan of ASEN-BS with a subplan of Bioengineering, and wants to change the subplan to Biomedical Engineering).

   a. **Program** page:

      i. Add a row.

      ii. Enter appropriate effective date (see second bullet under NOTES section, above).

      iii. **Program Action**: **Plan Change (PLNC)**.

      iv. **Action Reason**: **Subplan (SUPL)**.

   b. **Subplan** page: Don't add a row; just change the subplan.

   c. Click the **Save** button.

3. <u>**Remove a Subplan:**</u> Use for students who want to remove a subplan (option) that's associated with their plan (major) (e.g., removing a subplan of Biochemistry to a CHEM plan).

   a. **Program** page:

      i. Add a row.

      ii. Enter appropriate effective date (see second bullet under NOTES section, above).

      iii. **Program Action**: **Plan Change (PLNC)**.

      iv. **Action Reason**: **Removed Subplan (RSPL)**.

   b. **Subplan** page: Click the minus symbol (-) to delete the row for the subplan.

   c. Click the **Save** button.