Adding a Plan and/or Sub-Plan to a Student Record

OBJECTIVE: This document explains the steps taken to add or change a plan or a sub-plan to a student record.

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LESSON 2: ADDING A SUB-PLAN .....PG. 7

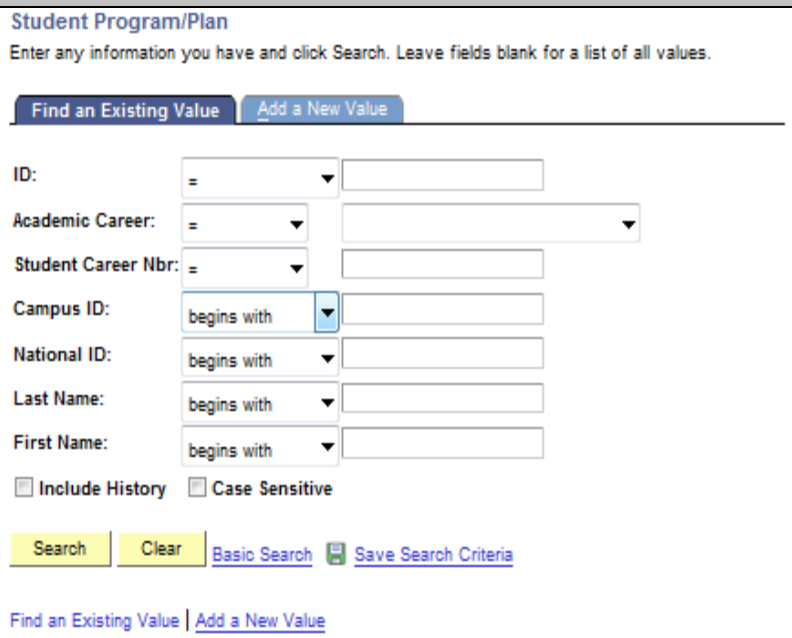
NEED ADDITIONAL INFORMATION?

For further questions on this process please go to the CMS webpage at http://www.sonoma.edu/it/cms/contact.html to locate the **Student Records Functional Lead** under Student Administration.

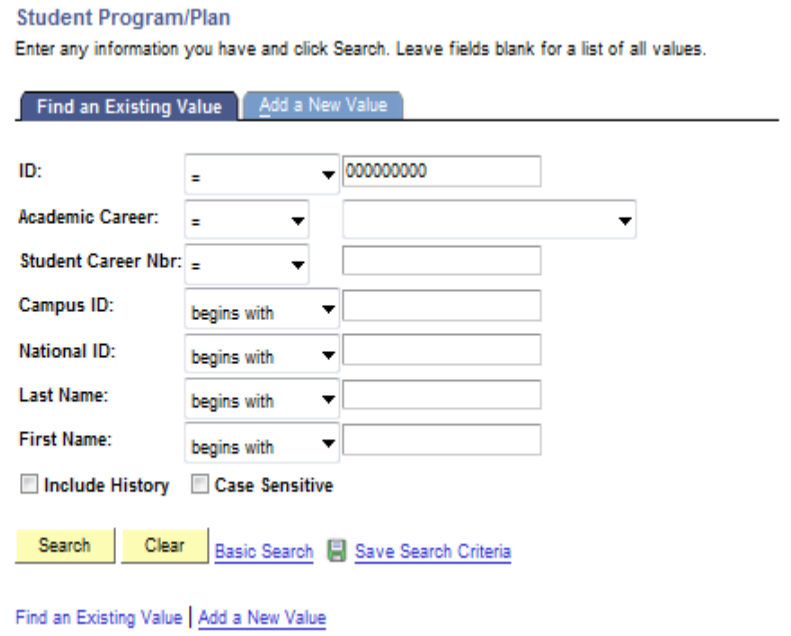
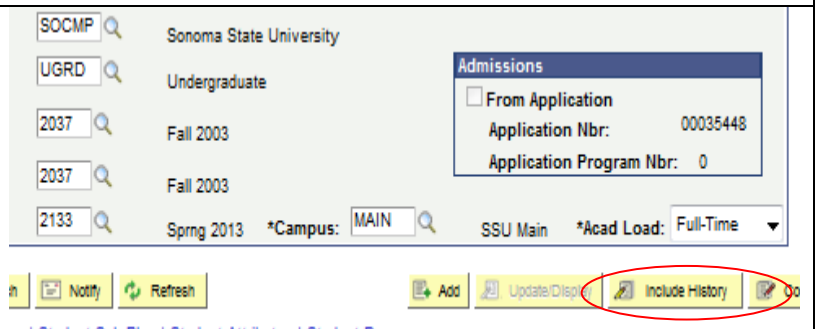
Lesson 1: Adding or Changing a Plan

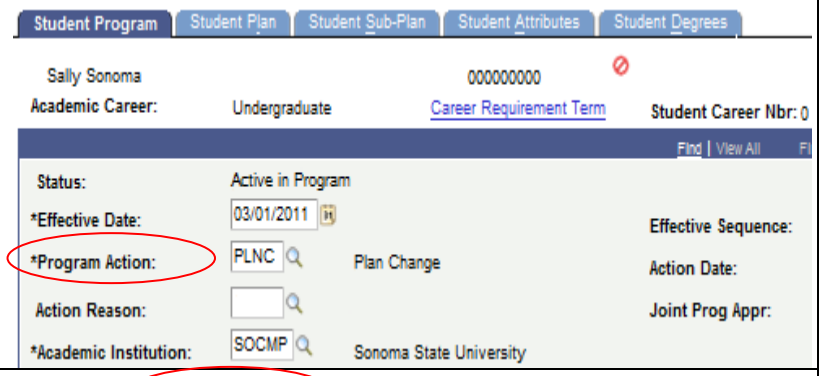
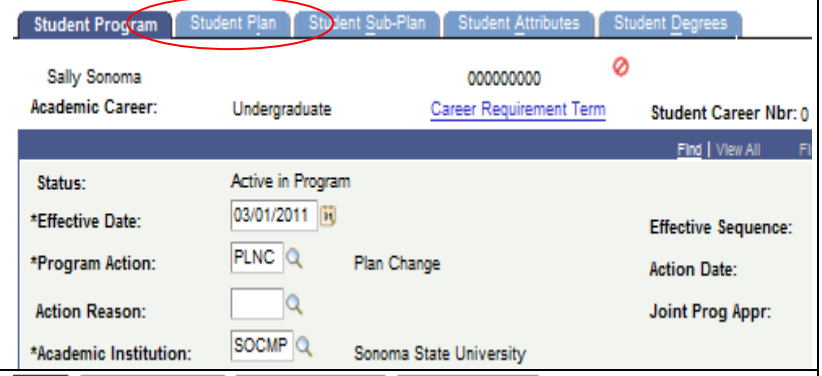
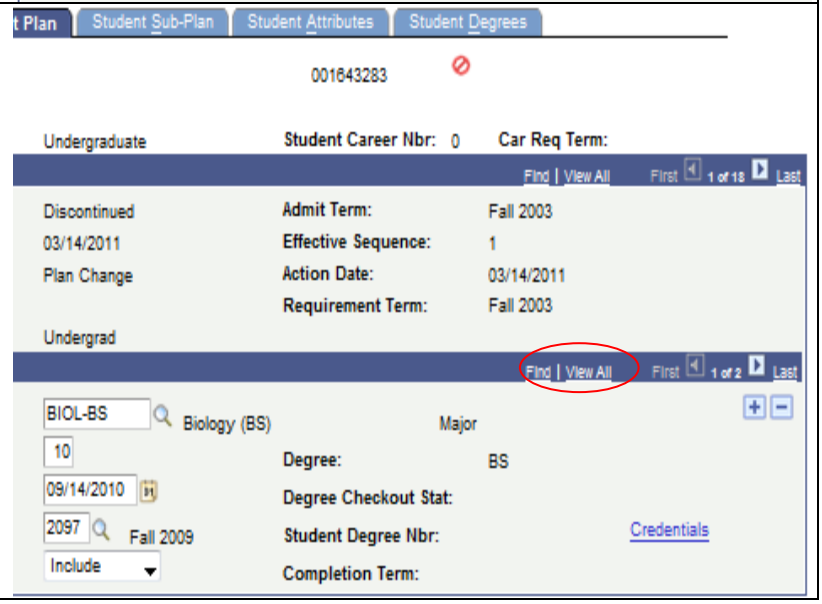
Navigation: Main Menu > Records and Enrollment > Career and Program Information > Student Program/Plan

INTRODUCTION: There may be times when a student needs to have a major changed or a minor added. This action requires an addition or change of the student's plan. The following table will outline the steps necessary to add or change a plan on a student record.

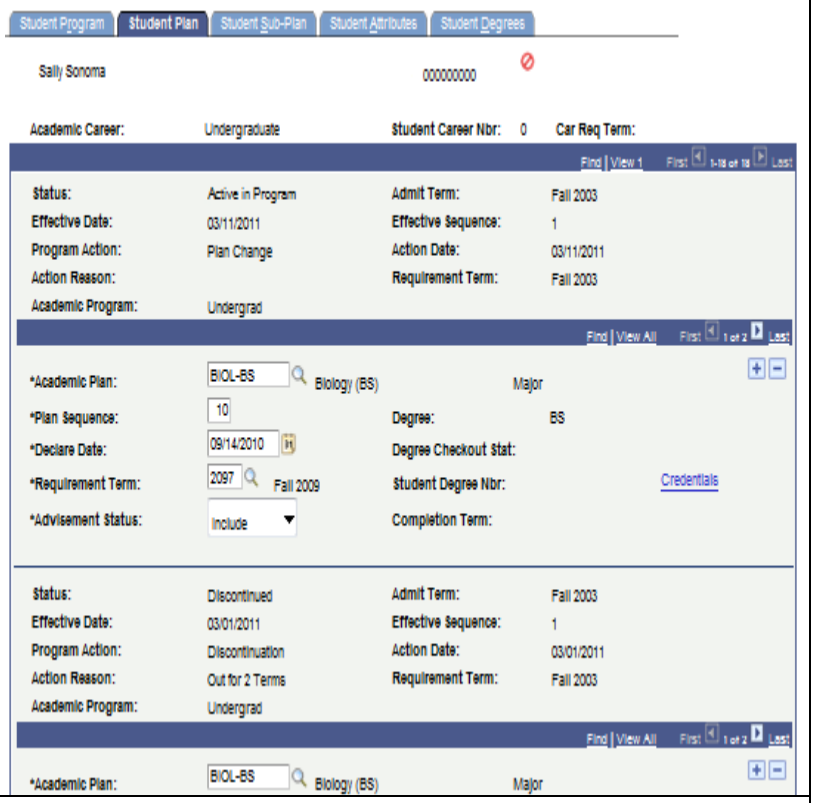
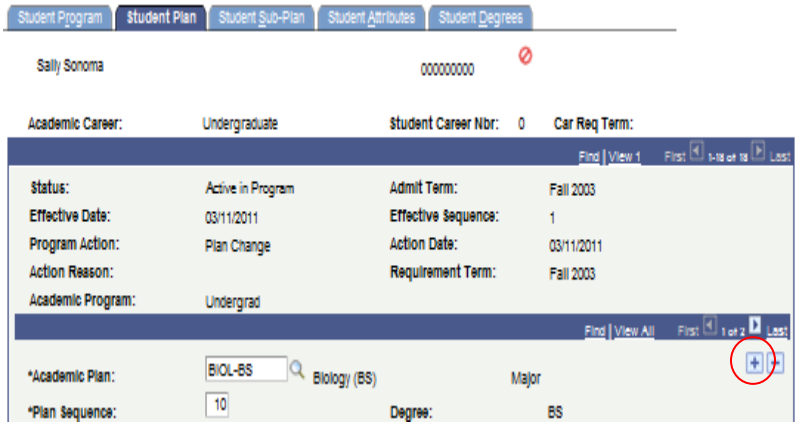
Step	Action	Screenshot
1	Navigate to the Student Program Plan page using the navigation: Records and Enrollment> Career and Program Information> Student Program/Plan	

Continued on the next page…

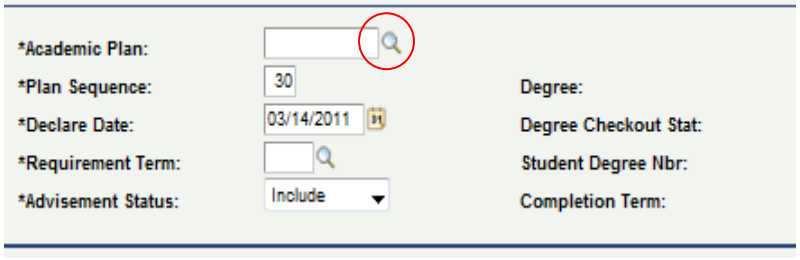
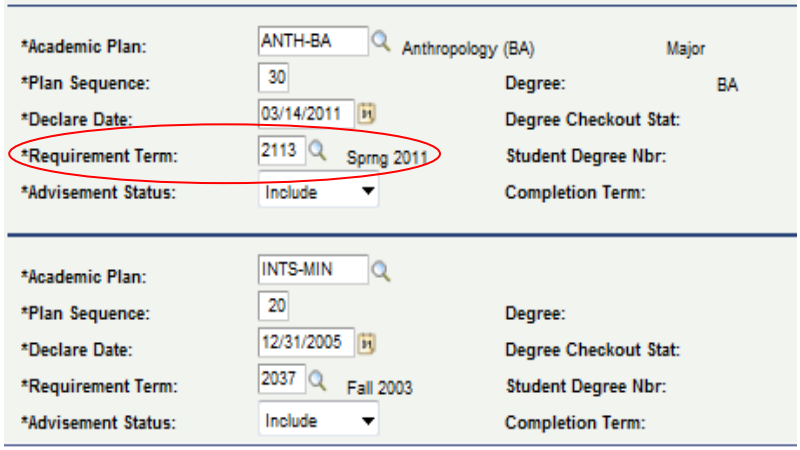
Step	Action	Screenshot
2	Enter the necessary information to look up the student who needs a plan added or changed.	
3	Click on the **Include History** button. NOTE: This step **must** be completed prior to adding or changing any student plan.	
4	All of the student's current and historical program information will be displayed. Click on the **Plus** button to add another Program row.	

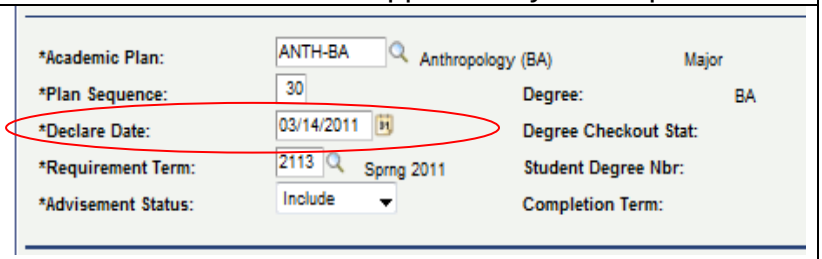
Step	Action	Screenshot
5	Enter the program action of PLNC into the *Program Action* box. This signifies a plan change.	
6	Click on the **Student Plan** tab.	
7	Click on **View All** to see all of the student's plan history. This ensures that the correct plan is changed or added.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>8</td><td>Determine the plan that requires the addition or change.

<table><tr><th>If</th><th>Then</th></tr><tr><td>A plan needs to be added (major or minor)…</td><td>Go to step 9.</td></tr><tr><td>A plan needs to be changed (major or minor)…</td><td>Go to step 10.</td></tr></table></td><td> 
</td></tr>
<tr><td>9</td><td>Click on the Plus button to add a new row to the existing plan.</td><td> 
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>10</td><td>Click on the Magnifying Glass icon to search for the appropriate plan to add/change for the student record.

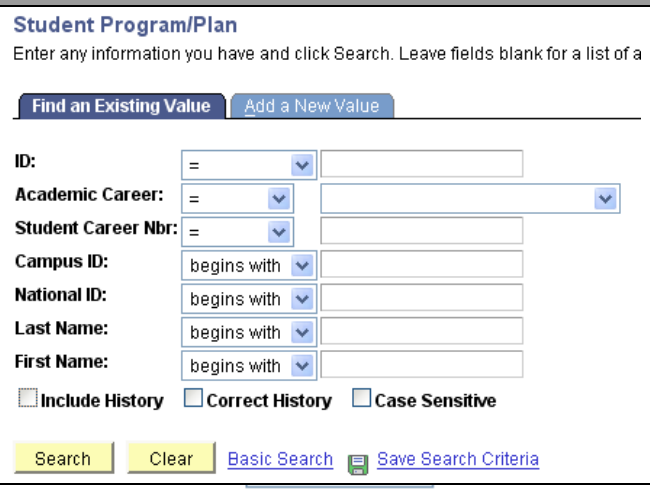
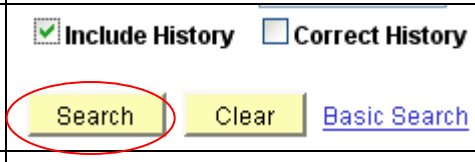
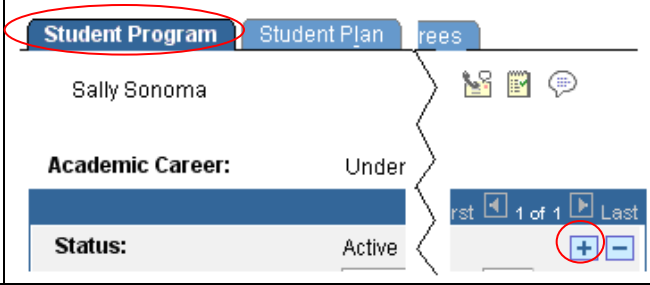
Select the appropriate plan from the list.</td><td> 
</td></tr>
<tr><td>11</td><td><table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>The major is declared in the same term as the default term…</td><td>Go to step 12.</td></tr>
<tr><td>The major is declared in a term that is later than the default term…</td><td>Update the Requirement Term to the declared term.</td></tr>
</table></td><td> 

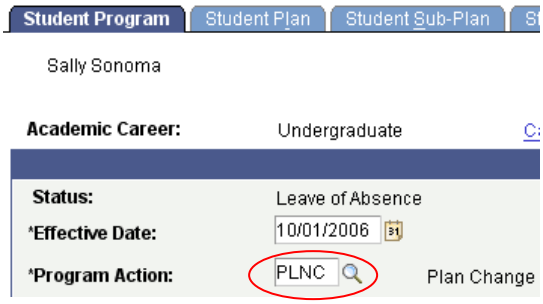
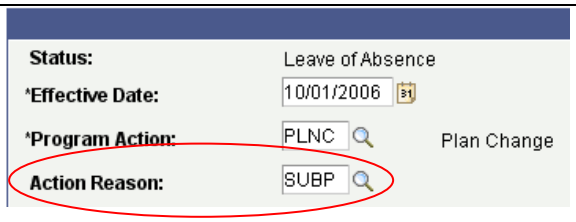
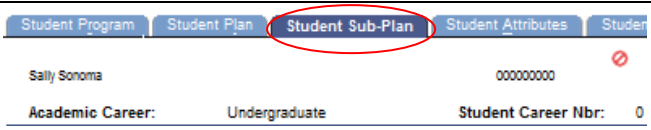
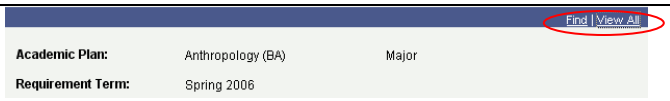
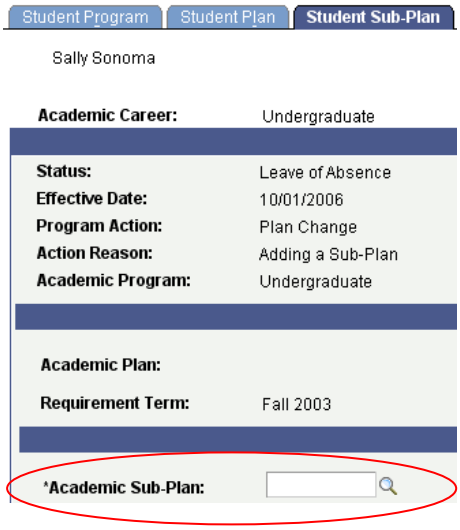
NOTE: The requirement term must be the default value or later unless otherwise approved by the Dept.</td></tr>
<tr><td>12</td><td>If appropriate change the declare date to reflect the student's request.</td><td> 
</td></tr>
<tr><td>13</td><td>Click Save to complete the changes.</td><td>
</td></tr>
</table>

Lesson 2: Adding a Sub-Plan

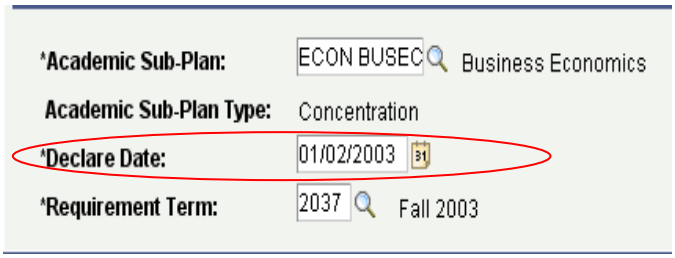
Navigation: Main Menu > Records and Enrollment > Career and Program Information > Student Program/Plan

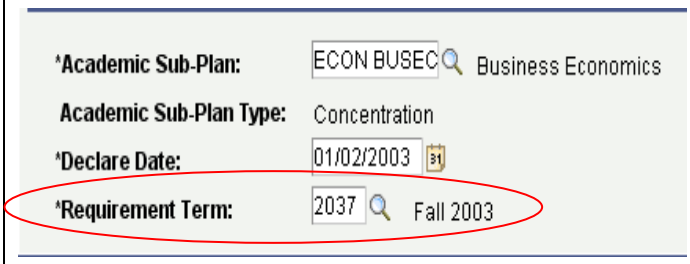
INTRODUCTION: The following table will outline the steps necessary to add a sub-plan to a student record.

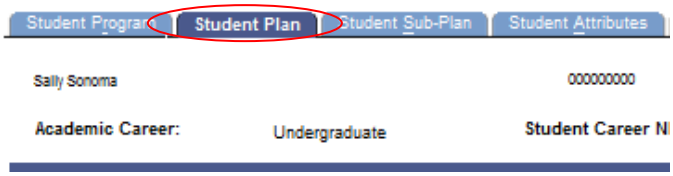
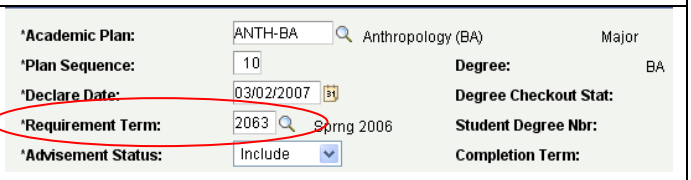
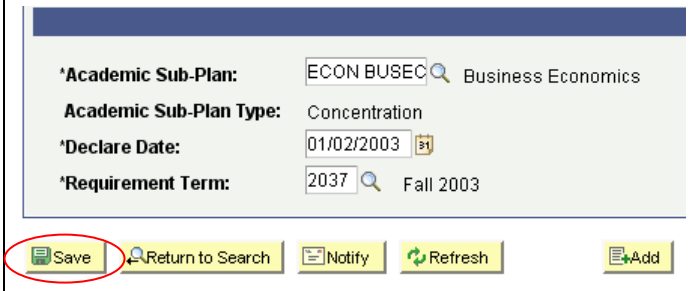
Step	Action	Screenshot
1	Locate the student by entering their name and/or student ID.	
2	Check the *Include History* box and click ***Search.***	
3	Add a row on the **Student Program** page by clicking on the "**plus**" button.	

Step	Action	Screenshot
4	In the **Program Action** box enter "**PLNC**" (Plan Change for the Program Action) *Program Action: PLNC NOTE: The magnifying glass (**Lookup Button**) next to any box will allow you to view available entries.	
5	In the **Action Reason** box enter **"SUBP"** (Adding a Sub-Plan) Action Reason: SUBP	
6	Click on the **Student Sub-Plan** tab at the top of the screen. Student Sub-Plan	
7	Click on **View All** to view all of the student's academic plans.	
8	Use the **Lookup** button to display available sub-plan options in the **Academic Sub-Plan** box. Select the appropriate sub-plan for the student. *Academic Sub-Plan: NOTE: Make sure you are on the correct **Academic Plan** row prior to assigning any Sub-Plans.	

<table>
<tr><th>Step</th><th>Action</th><th>Screenshot</th></tr>
<tr><td>9</td><td>Enter the appropriate date in the Declare Date field.

<table><tr><th>If</th><th>Then</th></tr><tr><td>The student is declaring the plan and the sub-plan on the same day…</td><td>Leave the defaulted Declare Date.</td></tr><tr><td>The student is declaring a sub-plan after the declaration of a plan…</td><td>Update the Declare Date field with the date on which the sub-plan is being declared.</td></tr></table></td><td> 
</td></tr>
<tr><td>10</td><td>If necessary update the Requirement Term (catalog year). This will default to the student's program admit term.

<table><tr><th>If</th><th>Then</th></tr><tr><td>The student's sub-plan existed in their original catalog year and they want to remain in that catalog year…</td><td>Allow the Requirement Term to default to the program admit term.
Go to step 13.</td></tr><tr><td>The student has a sub-plan that is newer than their original catalog year or they would like to switch to the current catalog year…</td><td>Update the Requirement Term with the catalog year necessary to determine the sub-plan courses.
Go to step 11.</td></tr></table></td><td> 
</td></tr>
</table>

Step	Action	Screenshot
11	Return to the Student Plan tab to update the Plan **Requirement Term**.	
12	Update the **Requirement Term** to reflect the updated term in the sub-plan.	
13	Click on the **Save** button to save your changes. Save