

Updating Student Plans and Sub-Plans

There are two key concepts that will be used in this section, Academic Structure and the existence of historical rows, which are explained below.

Academic Structure:

Every student has 3 levels of academic structure on their record. Some students have a fourth. This structure controls enrollment, grading, graduation, reporting and also impacts Financial Aid, billing and Degree Audits (DPR).

The three primary levels are:

- 1) *Career* – a combination of GPA & campus - Examples: UGDL (Undergraduate Lawrence), GRDL (Graduate/Prof Lawrence), Med (Medicine). In some cases a student may have more than one Career record, for example a student who was an undergraduate student and later continues in a graduate Career. In some cases a student may have one Career within which are 2 Career Numbers (Career Nbr.), for example an undergraduate student who begins as a CLASU then moves to BUSU. (A career number actually represents a different Program within a specific career.)
- 2) *Program* – school - Examples: CLASU (Liberal Arts & Sciences Undergraduate), EDUCG (Education Graduate) Programs are tied to a specific career.
- 3) *Plan* – degree/major, minor or co-major - Examples: BIOLA-BS (Biology BS), SPGD-EDS (School Psychology EDS) Degree/major plans are tied to a specific program (the one they are being offered through). Minors (several) and co-majors (currently only 2) are NOT tied to a specific program, but are tied to the UGDL career (Undergraduate Lawrence).

The fourth level that is applicable in some Plans:

- 4) *Sub-Plans* – emphasis or concentration area - (for Plan BIOLA-BS) GENETICS (Genetics) The applicable sub-plans are tied to a specific plan. NOTE: Not all plans have sub-plans, but some plans procedurally require a sub-plan.

During the course of a student's enrollment at KU, it is likely that changes to the Plan and Sub-Plans may occur. For some undergraduate students, the Plan will change many times prior to graduation.

Maintaining history by use of multiple rows in a record:

One of the beauties of PeopleSoft is the ability to retain a historical trail of changes made to a student record. This is achieved by the insertion and retention of rows of data with new effective dates. The data rows can be viewed through the pages or in reporting. In the student's program/plan record, inserting rows with new effective dates and appropriate data will apply changes to the record from the effective date into the future.

Following this navigation, select Student Program/Plan:
Records & Enrollment>Career & Program Information>Student Program/Plan

Selecting Student Program/Plan will open a search page.

Student Program/Plan

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

[Find an Existing Value](#) [Add a New Value](#)

Maximum number of rows to return (up to 300):

ID:

Academic Career: =

Student Career Nbr: =

Campus ID:

National ID:

Last Name:

First Name:

Include History Correct History

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

- Entering the student ID number will produce the fastest search result.

Alternately, the following criteria or combinations may be used:

- Enter the National ID (Social Security Number)
- Enter the Campus ID (former system ID or KUID)
- Enter a combination of the Last Name and all or part of the First Name.

HINT: When using Names for a search, if the search is the Last Name and at least the first letter of the First Name the resulting list will appear with the first names in alphabetical order. This is especially helpful if the Last Name is a common name. If using a portion of the Last Name, only the Last Name is in alphabetic order. It is not advisable to use only Last Name if that name is a common name. The results may be large and slow.

- Academic Career and Career Nbr are optional. If known, these fields may help narrow down the search result.
- When the Include History checkbox is checked it opens the record with all historical rows displayed. ***This Include History Box should be checked when updating a record to ensure that it recognizes activity on prior rows that may impact the update and is checked by default for this set of pages.***
- The Correct History checkbox access will only be given to a limited number of individuals with the Registrars' Offices.
- After the appropriate criteria have been entered, press Search.

If an ID number has been used and the student has more than one Career Nbr., the search result will return a list.

Search Results

Academic Career	Student Career Nbr	Program Short Descr	Institution Short Descr	Name	Gender	Date of Birth	Campus I
Contng Ed	0	Contng Ed	KU	Training,Joe Jayhawk	Male	01/15	123456
Undergrad	2	TranUG	KU	Training,Joe Jayhawk	Male	01/15	123456
Undergrad	1	JourU	KU	Training,Joe Jayhawk	Male	01/15	123456
Undergrad	0	Lib ArtsU	KU	Training,Joe Jayhawk	Male	01/15	123456

[Find an Existing Value](#) | [Add a New Value](#)

In this particular example, the student began as Liberal Arts Undergraduate program, later moved to Journalism Undergraduate program and along the way had transfer credit that was applied through the TranUG Program and took some correspondence study course(s) through Continuing Education. Tran Programs are not currently used for transfer work, these were only used for converted transfer work. Current transfer work is attached to whichever program a student is enrolling in.

- To select the record that will be updated, simply click on the ID field on the appropriate row.

There will be five components (folder tabs) displayed for this page.

The screenshot shows a software interface with five tabs: Student Program, Student Plan, Student Sub-Plan, Student Attributes, and Student Degrees. The 'Student Attributes' tab is active, showing details for 'Joseph Training'. The 'Career Requirement Term' sub-tab is selected and circled. The main window displays the following information:

- Academic Career:** Undergraduate
- Student Career Nbr:** 0
- Status:** Active in Program
- *Effective Date:** 02/05/2018
- *Program Action:** PLNC (Plan Change)
- Action Reason:** [Empty]
- *Academic Institution:** UKANS (University of Kansas)
- *Academic Program:** CLASU (Liberal Arts&So Undergraduate)
- *Admit Term:** 3929 (1992Fall)
- Requirement Term:** 3929 (1992Fall)
- Expected Grad Term:** [Empty]
- Last Updated On:** 02/05/2018 10:30:15AM
- By:** 1013199
- Effective Sequence:** 1
- Action Date:** 02/05/2018
- Joint Prog Appr:** [Unchecked]
- Admissions:** From Application (Application Nbr: [Empty], Application Program Nbr: 0)
- *Campus:** KULC (Lawrence)
- *Academic Load:** Full-Time

Below the main window, there are navigation buttons: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Add, Update/Display, Include History, and Correct History. At the bottom, there is a smaller window showing the 'Career Requirement Term' details:

- Academic Career:** Undergraduate
- Career Requirement Term:** 3929 (1992 Fall)

Buttons: OK, Cancel, Refresh

The Career Requirement Term is currently not used for basing the general requirements. However, an example would be when KU goes to the new core requirements degree audits maybe set up at this level and may also be used by other areas (i.e. Financial Aid).

The Student Program component displays information about the student's career and program and the current and former status of that program. Because this student has more than one historical row, the navigation bar reflects a row count of 1 of 5.



In order to view the additional rows, click on the navigational links on the bar. *View All* opens up all rows into one long scrollable page. If *View All* is selected and the rows are open the link will change to *View 1*. Choosing *View 1* collapses the display back to one row.

First will return the user to the first row if a different row is open.

Last takes the user directly to the last row, no matter how many rows are in the record.

The left and right arrow links allow the user to move through the rows one page at a time.

When initially opened, this first page displayed is the most recent row of the record.

The following is a list of fields shown on the Student Program component and their definitions.

The *Status* will indicate if the record is Active in Program. The other possibilities are Discontinued, Completed and Leave of Absence. This is very important to other areas of Enroll & Pay.

The *Effective Date* indicates the date the row should take effect and often is the beginning of a term but does not have to be.

The *Program Action* will indicate the activity taken on this record on this row. In the sample above the Action is COMP, which indicates a completion of degree(s) was performed on this record.

The *Action Reason* may be blank or will have a value if one exists for the Program Action taken. If the student has an AFD or AFDO, applied for graduation, the SACH or RACH reason must be used for the PLNC on top of the AFD or AFDO.

The *Academic Institution* will be UKANS.

The *Academic Program* will be the program that was active at the time of the row being viewed.

The *Admit Term* will be the term the student was admitted (or re-admitted) to the Program shown.

The *Requirement Term* defines the academic requirements that apply to this student.

Think of it in terms of what catalog was in effect in that term and can be prior to the Admit Term if the student has left and returned. **Only** certain staff in the school will have access to adjust this, so they will need to take into consideration their admit/readmit policies.

The *Expected Grad Term* is the term in which this student is expected to graduate and is currently only populated if the student is applying for graduation or already completed. This term may change during the student's time at the KU, if the student applies to graduate more than once.

The *By* is the ID number of end user that made the update. If you need to find the name of the person who updated this, navigate here: Campus Community>Personal Information>Biographical>Names

The *Campus* indicates the campus that is tied to the Program.

The *Acad Load* is the default load (full-time, part-time status) that is set for the Program and does not reflect the load the student is taking.

The *Effective Sequence* is usually 0. This sequence would increment by one if more than one row of data exists for the same Effective Date.

The *Action Date* indicates the date on which this entry was actually added to the record.

The system records this date and it cannot be changed.

The *Joint Prog Appr* box would only be used if KU sets an approval for joint degree programs. There are currently none set up this way.

The data in the *Admissions* box is specific to the original admissions application for the student.

The mode action buttons and links at the bottom of the page allow movement between records or changing the type of data being reviewed.



[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Attributes](#) | [Student Degrees](#)

The *Save* button is used once update(s) are made to the Student Program, Student Plan and possibly the Student Sub-Plan components (tabs).

Return to Search exits the Student Program/Plan page group and returns to the search page.

The *Previous in List* button moves the user to previous Career record.

The *Next in List* button would be active if the student had more than one Career record and the user was moving between those career records.

The *Refresh* button is similar to the browser's Refresh button. It refreshes data on the page if there are any changes occurring.

The *Update/Display* and *Include History* buttons indicate the mode that is being viewed or may be chosen. If the button is grey (disabled) that is the current mode. In the sample above, the record is open in Include History mode that allows the viewing of ALL historical rows. If the record were being viewed in Update/Display mode, only the most recent row would display.

Access to both the *Add* and the *Correct History* buttons will only be given to the Registrars' Offices.

The page/tab links at the bottom of the page work the same as the tabs at the top of the page. Either the tabs or links may be used to maneuver from one page in the group to the next.

The first action required in updating a Plan and or Sub-Plan is to add a new effective-dated row on the Student Program component. This sets the effective date for the Plan and Sub-Plan level.

- Press the Add a New Row button (+)

A new, clean row on the Student Program component will open and will show an Effective date that is the current (system) date.

The screenshot shows a web-based form for updating a Student Program component. At the top, there are tabs for 'Student Program', 'Student Plan', 'Student Sub-Plan', 'Student Attributes', and 'Student Degrees'. The 'Student Program' tab is active. The form displays the following information:

- Student Information:** Joe Training, ID: 1234567
- Academic Career:** Undergraduate
- Status:** Active in Program
- Effective Date:** 08/22/2002
- Program Action:** PLNC (Plan Change)
- Academic Institution:** UKANS (University of Kansas)
- Academic Program:** JOURU (Journalism Undergraduate)
- Admit Term:** 3952 (1995Spring)
- Requirement Term:** 3952 (1995Spring)
- Expected Grad Term:** (empty)
- Campus:** KULC (Lawrence)
- Acad Load:** Full-Time

At the bottom of the form, there is a row of buttons: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Add, Update/Display, Include History, and Correct History.

- If the Effective date needs to be adjusted, do so now. Today's date defaults in, but can be changed.
- Enter or select from the lookup a Program Action of PLNC. No other information needs to be adjusted on this component for a Plan Change or Sub-Plan Change.
- Requirement Term at the Student Program level defines any school's specific requirements.

Move to the Student Plan component (without pressing Save).

- Click on the Student Plan tab or select the link at the bottom of the page to open the Plan page.

Student Plan:

The top section of the Plan component will display most of the same information reflected on the Student Program component. Among the items are the Program Action and Effective date that were entered on the Program component.

The bottom section of the Plan component displays the current Plan information for the student.

Student Program	Student Plan	Student Sub-Plan	Student Attributes	Student Degrees
Joe Training		1234567		🚫 ★ 📄
Academic Career:	Undergraduate	Student Career Nbr:	1	Car Req Term:
Find View All First 3 of 4 Last				
Status:	Active in Program	Admit Term:	1995Spring	
Effective Date:	08/22/2002	Effective Sequence:	0	
Program Action:	Plan Change	Action Date:	08/22/2002	
Action Reason:		Requirement Term:	1995Spring	
Academic Program:	JourU			
Find View All First 1 of 1 Last				
*Academic Plan:	SCJ-BSJ	Strategic CommunicationsBSJ	Major	+ -
*Plan Sequence:	10	Degree:	BSJ	
*Declare Date:	08/22/2002	Degree Checkout Stat:		
*Requirement Term:	3952 1995Spring	Student Degree Nbr:		
*Advisement Status:	Include	Completion Term:		

The Academic Plan that initially displays is the Plan that existed on the prior effective dated row. If the student had more than one plan the navigational bar would be active and a row count other than 1 of 1 would appear. (See navigational notes under the Student Program component for details.)

There are three different types of Plan changes:

- 1) to change the existing plan (major)
- 2) to add an additional plan (degree/major, minor or co-major)
- 3) to remove a plan

NOTE: Students should NOT be left with only a minor or co-major unless under special circumstances.

Instructions for each of these follow:

Example 1: To change an existing Plan (degree/major, co-major or minor):

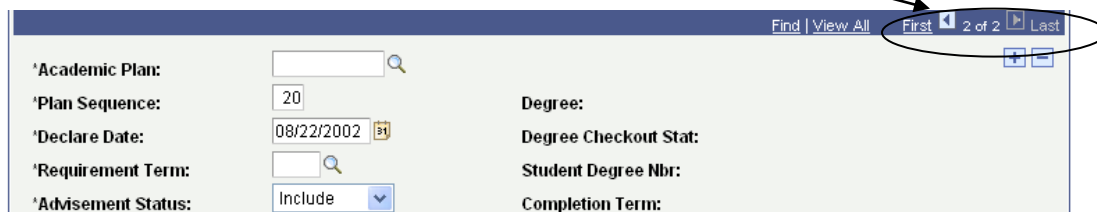
After inserting a PLNC row on the Student Program component:

- On the Student Plan component, enter or select from the lookup a different Academic Plan. (This will appear to overwrite the prior entry, however that information is retained on the prior row.)
- The Plan Sequence is set by the addition of the row. Normally this would not be changed.
- Change the Declare Date for the new plan if necessary. The Declare Date will default as today's date
- Requirement Term at the Student Plan level defines the major specific requirements. **NOTE: Only** certain staff in a school should update this.
- The Advisement Status is not currently used and should not be changed.
- The Plan Attribute is tied to the plan listed above it and currently the only attribute is Edwards Campus. If blank, the student has no attribute. Enter Edwards if the student is an Edwards Campus student for that plan. Use the minus to the right to remove the Plan Attribute. Beginning the Fall 2012, this is no longer used although it may still appear on old records.
- Go to the Sub-Plan component only if there's a Sub-Plan attached to the new Plan you just entered on the Plan component and enter (or look up) the correct Sub-Plan value.
- Press the Save button at the bottom of the page if finished. Do not Save if also needing to add/change the sub-plan information.

Example 2: Add a second Plan (degree/major, minor or co-major):

After inserting a PLNC row on the Student Program component:

- On the Student Plan component, press the Add a New Row button in the second navigational section/heading on the Plan component. This will bring a new row area with several blank fields. Note in the screen shot below the first navigational section/heading now shows a row count 2 of 2 and the navigation links are now active.



- Enter or select from the lookup a new Academic Plan.
- The Plan Sequence is set by the addition of the row.
- Enter the Declare Date if it is different from today's date that defaults in.
- Requirement Term at the Student Plan level defines the major specific requirements. **NOTE: Only** certain staff in a school will have access to update this.
- The Advisement Status is not currently used and should not be changed.

- Go to the Sub-Plan component only if there's a Sub-Plan attached to the new Plan you just entered on the Plan component and enter (or look up) the correct Sub-Plan value .
- Press the Save button at the bottom of the page when finished.

Example 3: To remove a Plan if the student has multiple plans (degree/major, minor or co-major):

After inserting a PLNC row on the Student Program component:

- On the Student Plan component, find the plan that needs to be removed, use the minus button to the right of it, then hit ok. (This will appear to overwrite the prior entry, however that information is retained on the prior row.)
- Press the Save button at the bottom of the page if finished.

Updating Student Sub-Plans:

Certain Plans also have Sub-Plans. A Sub-Plan allows the school to further define the academic work a student is completing. Sub-Plans are often used to reflect an area of emphasis, a concentration, specialization or track.

After inserting a row on the Program component and after either inserting a row or changing the Academic Plan on the Student Plan component, move to the Student Sub-Plan component by clicking on the Student Sub-Plan tab. That will open the Sub-Plan component. The topmost section of this page contains the Academic Program information and reflects the new Effective Date and Program Action. The middle section reflects the current row Plan information. The bottom section is for the Sub-Plan information.

Joe Training 1234567

Academic Career: Undergraduate Student Career Nbr: 1

Status:	Completed Program	Admit Term:	1995Spring
Effective Date:	05/23/2004	Effective Sequence:	1
Program Action:	Completion of Program	Action Date:	06/25/2004
Action Reason:			
Academic Program:	Journalism Undergraduate	University of Kansas	

Academic Plan: Strategic CommunicationsBSJ Major

Requirement Term: 1995 Spring

'Academic Sub-Plan':

Academic Sub-Plan Type:

'Declare Date': 08/22/2002

'Requirement Term':

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display Include History Correct History

[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Attributes](#) | [Student Degrees](#)




To add a Sub-Plan:

Make sure that the Student Plan shown on the Sub-Plan component is the correct Plan to which the Sub-Plan will be applied. If there are multiple Plan rows, it may be necessary to use the Plan navigational links to open the correct Plan row.

- Enter the Sub-Plan code or select the Sub-Plan using the lookup function. The list of Sub-Plans available for selection will be limited to those that go with a specific Plan.

The Academic Sub-Plan Type will populate from the setup of the Sub-Plan.

Student Program | Student Plan | **Student Sub-Plan** | Student Attributes | Student Degrees

Joe Training 1234567   

Academic Career: Undergraduate **Student Career Nbr:** 0




Find | View All First 1 of 5 Last


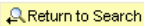
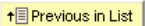




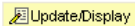
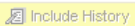
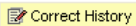
Status: Completed Program **Admit Term:** 1992Fall
Effective Date: 12/31/2005 **Effective Sequence:** 1
Program Action: Completion of Program **Action Date:** 12/20/2005
Action Reason:
Academic Program: Liberal Arts Undergraduate University of Kansas

Find | View All First 1 of 1 Last

Academic Plan: BiologyBS Major
Requirement Term: 1992 Fall



Find | View All First 1 of 1 Last


'Academic Sub-Plan: CELL_BIOL Cellular Biology  
Academic Sub-Plan Type: Concentration
'Declare Date: 09/01/2005 
'Requirement Term: 3929 1992Fall

[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Attributes](#) | [Student Degrees](#)

- Enter the Declare Date if different from the default date (again, the default is the system or current date.)
 - Requirement Term at the Student Sub-Plan level defines the concentration/emphasis specific requirements. **NOTE: Only** certain staff in a school will have access to update this.
- If applicable, add a second Sub-Plan:

Find | View All First 2 of 2 Last  




'Academic Sub-Plan: GENETICS Genetics
Academic Sub-Plan Type: Concentration
'Declare Date: 09/01/2005 
'Requirement Term: 3929 1992Fall

- Press the Save button when finished.




Student Degrees:

When an Application for Degree is processed, it is also necessary that the Degree Checkout Status for this student is set. This is set on the Student Degrees component by the Registrar's Office.

- After the row on the Program page is inserted with the use of the Program Action of Application for Degree (AFD or AFDO) and the Expected Graduation term is entered, on the Student Degrees component the Checkout Status of Applied will be listed.

Student Program	Student Plan	Student Sub-Plan	Student Attributes	Student Degrees
Joe Training		1234567		  
Academic Career:	Undergraduate	Student Career Nbr:	0	
Find View All First 1 of 4 Last				
Status:	Active in Program	Admit Term:	1992Fall	
Effective Date:	11/01/2005	Effective Sequence:	1	
Program Action:	Application For Degree	Action Date:	11/21/2005	
Action Reason:				
Academic Program:	Liberal Arts Undergraduate			
Requirement Term:	1992 Fall			
Degree Checkout Stat:	<input type="text" value="Applied"/>	<input type="button" value="Update Degrees"/>		
Completion Term:	<input type="text"/>	Degree GPA:	<input type="text"/>	
Degree Honors 1:	<input type="text"/>			
Degree Honors 2:	<input type="text"/>			
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>				
Student Program Student Plan Student Sub-Plan Student Attributes Student Degrees				

Note by using the COMP Action on the Program page, the Degree Checkout Status now displays Awarded along with a Completion Term.

Student Program	Student Plan	Student Sub-Plan	Student Attributes	Student Degrees
Joe Training		1234567		  
Academic Career:	Undergraduate	Student Career Nbr:	0	
Find View All First 1 of 5 Last				
Status:	Completed Program	Admit Term:	1992Fall	
Effective Date:	12/21/2005	Effective Sequence:	1	
Program Action:	Completion of Program	Action Date:	02/21/2006	
Action Reason:				
Academic Program:	Liberal Arts Undergraduate			
Requirement Term:	1992 Fall			
Degree Checkout Stat:	Awarded			<input type="button" value="Update Degrees"/>
Completion Term:	4059	2005Fall	Degree GPA:	<input type="text"/>
Degree Honors 1:	<input type="text"/>			
Degree Honors 2:	<input type="text"/>			
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>				
Student Program Student Plan Student Sub-Plan Student Attributes Student Degrees				

- If Degree Honors are known at the time the degree is posted, they would have been entered on this page.

This process closes out this career record and records the degree information in a new table that can be viewed in the Student Degrees page.

To Exit this page, select the Return to Search button.