# Managing Student Programs, Plans, and Subplans

## Understanding Academic Program and Plan Activation

A student must be active in an academic program and plan to later be activated into a term for that academic program and plan. You can activate students into academic programs and plans by either of the following methods:

- Transmit the student's academic program and plan data through the Activate Applications matriculation process (ABPCPPRC) in Recruiting and Admissions, this being the usual method.
- Enter the student's academic program and plan data manually in the Student Program/Plan component.

The system stores the student's academic program and plan data on rows in the academic program table (ACAD_PROG). Collectively, all of a student's rows in the ACAD_PROG table are called the student's *program stack.* Now the individual is active in an academic program and plan and qualifies for activation into a term.

### Related Links

"Updating Applications" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

## Understanding Program Actions and Statuses

When you execute program actions to change a student's program data, the corresponding program action status often changes. For your reference, the program actions and program statuses relevant to Student Records are explained in the following table:

| *Program Action Selected* | *Explanation* | *System Updates Program Status To* | *Additional Steps Required* |
|---|---|---|---|
| ACTV (Activate) | A student is ready either to enroll in a term or to be evaluated for transfer credit. | Active in Program | None |
| WADM (Administrative Withdrawal) | A student is withdrawn for administrative reasons. | Canceled | Post the withdrawal on the student Withdrawal page. |
| COMP (Completion of Program) | A student has completed the program. | Program Complete | If the student is ready for graduation processing, complete the graduate process on the Student Degrees page. |

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| ***Program Action Selected*** | ***Explanation*** | ***System Updates Program Status To*** | ***Additional Steps Required*** |
|---|---|---|---|
| DEFR (Defer Enrollment) | A person 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. | The last action's program status. | None |
| DATA (Data Change), PRGC (Program Change), PLNC (Plan Change) | Data relative to a student's program, plan, or career status was changed. | No status effect. | When you change a student's program with one of these program actions and the start date of the new program is after the effective date of the change, the system automatically resets the Form of Study field on the student's career term record to the default value of enrollment *(ENRL)*. Use the Form of Study field on the Term Activation page to specify a value other than the default. |
| DISM (Dismissal) | A student is dismissed from the academic institution. | Dismissed | Post the withdrawal on the student Withdrawal page. |
| DISC (Discontinuation) | A student discontinues attendance. | Discontinued | Post the withdrawal on the student Withdrawal page. |
| LEAV (Leave of Absence) | A student takes a leave of absence from his program. | Leave of Absence | None |
| RADM (Readmit) | A person has applied to reenter a student career and academic program for which they already have a student record. | Active in Program | When you choose this action, the Career Number field on the Admissions Application Maintenance page becomes editable. On the Application Maintenance page, you must select which student record should be populated with the readmit information if the student enrolls again. Additionally, if you enter this action, the admit type that you enter on the Application Data page must be associated with readmit processing. |
| RLOA (Return from Leave of Absence) | A student returns from a leave of absence. | Active | Activate the student. |


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| *Program Action Selected* | *Explanation* | *System Updates Program Status To* | *Additional Steps Required* |
|---|---|---|---|
| REVK (Revoke Degree) | Revoke a student's degree. The system automatically updates the student degree tables. Revoked degrees do not appear on the student transcript. | Active | Activate the student. |
| SPND (Suspension) | A student is suspended from your academic institution. | Suspended | Post a withdrawal on the student Withdrawal page. |
| TRAN (Transfer to Other Career) | A student makes an intercareer transfer. | Program Completed | Activate the student in the new academic career. |
| ADRV (Admission Revocation) | A person was admitted into an academic program, but it was later determined that the person did not qualify for admission. | Cancelled | None |
| MATR (Matriculation) | A person has completed all necessary steps to become an active student in an academic program. | Active | Activate the student into the academic program. |

### Related Links

"Understanding Admissions Program Actions and Statuses" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

## Understanding Program Actions Where Future Enrollments Exist

For certain program actions, if you enter the program action but the student is enrolled in classes where the start date of the term is after the effective date of that program action, the system displays a warning message because these are future enrollments. The program actions affected by future enrollments are the following:

| *Code* | *Description* | *Status* |
|---|---|---|
| ADRV | Admissions Revocation | Cancelled |
| COMP | Completion of Program | Completed Program |
| DISC | Discontinuation | Discontinued |
| DISM | Dismissal | Dismissed |
| LEAV | Leave of Absence | Leave of Absence |
| SPND | Suspension | Suspended |

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| Code | Description | Status |
|---|---|---|
| TRAN | Transfer to Other Career | Completed Program |
| VDIS | Voluntarily Discontinued | Discontinued |
| WADM | Administrative Withdrawal | Cancelled |

If you receive the warning message for one of these program actions, then perform the appropriate action on the student's future class enrollments. Because each academic institution has different policies, the warning message alerts so that you can take action based on your institution's policies.

For example, if you enter a program action of *DISM* (Dismissal) and the student has registered and paid tuition for classes in the following term, your institution might require that you drop the student from the courses and issue a full refund.

Or, if you enter a program action of *COMP* (Completion of Program) and the student has registered for classes in the following term, your institution might require that you activate the student in a nondegree-seeking program by changing the student career number to the new academic program on the Term Activation page. This enables the student to continue attending the academic institution.

## Understanding Program Actions Where Future Active Terms with No Enrollment Exist

If you enter certain program actions and a student is active in a future term or terms, where the start date of the term is after the effective date of that program action, and the student has no enrollment in the term or terms, the system displays a warning message. The program actions affected by future active terms with no enrollment are:

| Code | Description | Status |
|---|---|---|
| COMP | Completion of Program | Completed Program |
| DISC | Discontinuation | Discontinued |
| DISM | Dismissal | Dismissed |
| LEAV | Leave of Absence | Leave of Absence |
| SPND | Suspension | Suspended |
| TRAN | Transfer to Other Career | Completed Program |
| VDIS | Voluntarily Discontinued | Discontinued |
| WADM | Administrative Withdrawal | Cancelled |

You can still save the program action change when you receive the warning message.

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If you change the severity of the message (Message Catalog entry 14600, 870) to *Error,* you cannot save the change to the program action. To access the Message Catalog, select PeopleTools > Utilities > Administration > Message Catalog.

# Maintaining Student Program Stacks

Bundle 49. New fields for elements Thesis Submission Date (E591) and Research Completion Date (E592) added to the AUS Student Program page. These were part of the HEIMS updates in Bundle 48.

This section discusses how to:

- Maintain student academic programs.
- Select a student's career requirement terms.
- Maintain student academic plans.
- Maintain student academic subplans.
- Maintain student additional information.
- (AUS) Enter Australia-specific student program information.
- (CAN) Enter ESIS student program data.

## Pages Used to Manage Student Program Stacks

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Student Program | STDNT_PROG | Records and Enrollment > Career and Program Information > Student Program/Plan > Student Program | Add an academic program to a student's program stack, maintain the student's academic program record, or execute program actions that update the student's academic program record. |
| Career Requirement Term | STDNT_CAREER_SP | Click the Career Requirement Term link on the Student Program page. | Select the student's career requirement term. |
| Student Plan | STDNT_PLAN | Records and Enrollment > Career and Program Information > Student Program/Plan > Student Plan | Add an academic plan to a student's academic program or modify a student's existing academic plan. |
| Student Sub-Plan | STDNT_SUB_PLAN | Records and Enrollment > Career and Program Information > Student Program/Plan > Student Sub-Plan | Add an academic subplan to a student's academic plan, or modify a student's existing academic subplan. |

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| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Additional Information | STDNT_PROG_CAF | Records and Enrollment > Career and Program Information > Student Program/Plan > Additional Information | Enter or update common attributes for student program, plan and subplan. |
| AUS Student Program | SSR_STD_PRG_AUS | Records and Enrollment > Career and Program Information > Student Program/Plan > AUS Student Program | Enter Australia specific information for the student.<br>**Note:** The fields on this page are available only if the Australian DEST, HECS, Centrelink, TAC check box is selected on the Academic Institution 6 page. |
| Cdn Student Program (Canadian student program) | CAN_RPT_STD_ENR | Records and Enrollment > Career and Program Information > Student Program/Plan > Cdn Student Program | **Note:** This page is available only if the Canadian Government Reporting check box is selected on the Academic Institution 6 page.<br>Define ESIS student program data. |

### Related Links

Tracking Student Attributes

Verifying and Updating Student Degree Data

## Maintaining Student Academic Programs

Access the Student Program page (Records and Enrollment > Career and Program Information > Student Program/Plan > Student Program).


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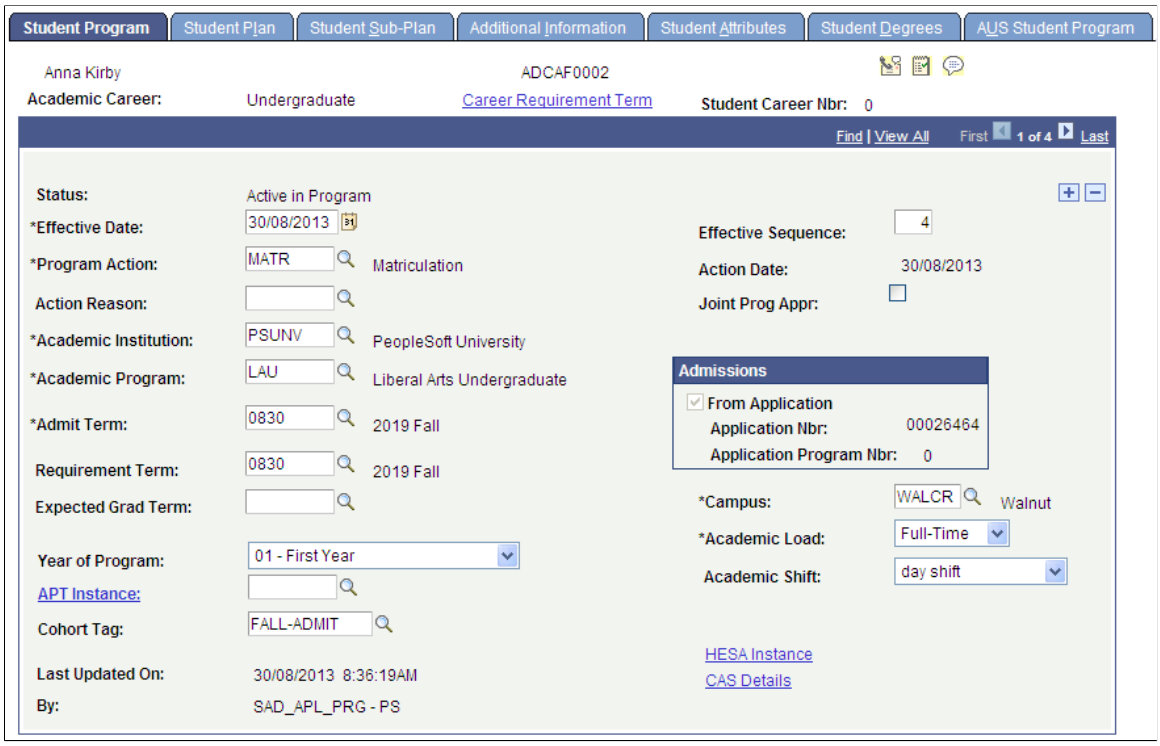
### Image: Student Program page

This example illustrates the fields and controls on the Student Program page. You can find definitions for the fields and controls later on this page.




**Academic Career**

The academic career to which the student's academic program belongs. Students can be active in multiple academic careers, either consecutively or concurrently.

**Career Requirement Term**

Click to access the Career Requirement Term page.

**Student Career Number**

Differentiates a student's 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. A student's primary academic program controls the values of various fields on the student's career term record (STDNT_CAR_TERM).

**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.

**Effective Date**

Enter the date on which the program action and the other field values on the row becomes effective. If a term has begun and you must update a student's academic program so that a new academic program is the primary one, you must use an effective

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date that is prior to the maximum program effective date for that term.

**Effective Sequence**

Determines the sequencing of changes to a student's program. The system increments this number whenever you enter new effective-dated changes to a student's academic program data for a given academic career.

**Program Action**

A change to a student's academic program data. Select the program action that you want to execute.

If a student has future enrollments and you enter certain program actions, the system displays a warning message informing you that the student is enrolled in classes after the effective date of the program action.

If the program change affects the student's primary academic program, the system resets the FA_ELIGIBILITY field on the STDNT_CAR_TERM table to the appropriate value of the newly assigned academic program, as defined in the Financial Aid Eligible field on the Academic Program page. Plus, the system selects the FA_STATS_CALC field on the STDNT _CAR_TERM table. This indicates to Financial Aid that a relevant change has been made to the student's career term record and that the FA Term Build process should be rerun for the student.

**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. For example, you can record that a student withdrew from an academic program. The reason that you enter could be *Medical Reasons* or *Change of Program.* Select the reason for the program action.

**Academic Institution**

The system automatically populates the academic institution, which refers to the academic institution that owns the student's academic program.

**Academic Program**

Select the student's academic program. To change this value as a student changes academic programs, insert a row, select a program action of *PRGC,* and select a new value for this field.

**From Application, Program Number,** and **Admissions Application Number**

If the student's information on the ACAD_PROG table was transmitted into the table through the Activate Applications matriculation process (ABPCPPRC), the From Application check box is selected and the system displays the admissions application number and program number.

**Joint Program Approved**

Select to track that a student is in a dual academic program. When you select this check box the system activates the Dual Academic Program field, where you must enter the

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| | |
|---|---|
| | other academic program in which the student is active for this academic career. |
| **Admit Term** | Determines the earliest term in which you can activate a student into a term for this academic career. The field value appears by default according to the value transmitted onto the student's record in the ACAD_PROG table through the Activate Applications matriculation process (ABPCPPRC).<br><br>If you have not run the matriculation process and are performing a quick activation for the student, enter the admit term for the academic program. The admit term you enter must be greater than or equal to the first term valid for the specified program (or plan or subplan). Also, the student's admit term must be less than or equal to the last admit term for the program (or plan or subplan). When you run the Term Activation process, it validates the term in which you are activating the student against the admit term. If the admit term occurs after the activation term, you cannot complete the term activation. |
| **Requirement Term** | Indicates the term in which academic advisement degree progress requirements apply to the student for this academic program. The field value appears by default according to the value transmitted onto the student's record in the ACAD_PROG table through the Activate Applications matriculation process (ABPCPPRC).<br><br>If you have not run the matriculation process and are performing a quick activation for the student, enter the admit term for the academic program. |
| **Campus** | Select the campus on which the student will be active in the specified academic program. |
| **Expected Graduation Term** | Select the term in which the student expects to graduate from the specified academic program. Expected graduation term is also used in financial aid need analysis. |
| **APT Instance, Year of Program** and **Cohort Tag** | These fields are used for Program Enrollment.<br><br>See Setting Up Enrollment Cohorts<br><br>See Linking an APT Instance to the Student Program |
| **Academic Load** | Select the academic load that the student will carry within the specified academic program. |
| **Academic Shift** | Indicates the attendance pattern under which a student record was created. The field appears if the Use Shift check box is selected on the Academic Institution 3 page.<br><br>The value here is inherited from the Admissions application when the student is matriculated. If Admissions is bypassed, select a value when manually adding and activating a student. |

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If only the Use Shift check box is selected on Academic Institution 3 page, the Academic Shift field is optional and the values available here are those defined on the Academic Shift page. If the Use Shift by Admit Term check box is also selected, then the values are those defined on the Academic Shift page and then mapped to an admit term on the Academic Shift Mapping page.

See "Setting Additional Institution Defaults and Options" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

See "Defining Academic Shifts" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

See "Mapping Academic Shifts to Admit Terms" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

See "Entering Application Program Data" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

**Last Updated On** and **By**

The date on which the page was last updated and the name of the user who updated the page.

**(NZL) Funding Source**

Select the funding source for this student program.

This is the funding source applicable to the student and reported to the Ministry of Education Single Data Return (SDR). It defaults to the enrollment record. The value is inherited from the Admissions application when the student is matriculated. If admissions is bypassed, select the value during the quick admit or manual program addition process. This field is mandatory.

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**Note:** This field appears only for students in New Zealand institutions.

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### Related Links

Understanding Program Actions and Statuses

Understanding Program Actions Where Future Enrollments Exist

## Selecting a Student's Career Requirements Terms

Access the Career Requirement Term page (click the Career Requirement Term link on the Student Program page).

**Academic Career**

The academic career for which you are defining the student's career requirement term.

**Career Requirement Term**

Indicates the term in which academic advisement degree progress requirements apply to the student for this academic career. Select the student's career requirement term.


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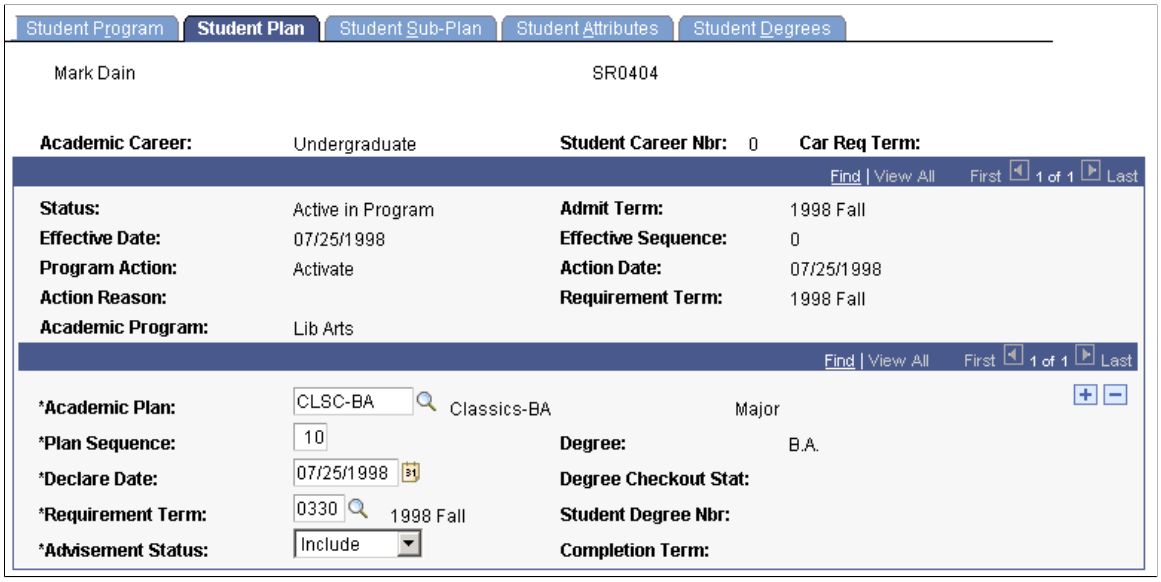
## Maintaining Student Academic Plans

Access the Student Plan page (Records and Enrollment > Career and Program Information > Student Program/Plan > Student Plan).

**Image: Student Plan page**

This example illustrates the fields and controls on the Student Plan page. You can find definitions for the fields and controls later on this page.




**Requirement Term** Indicates the term in which academic advisement degree progress requirements apply to the student for the given academic program.

**Academic Plan** A valid academic plan is required to activate a student into a term. Select the academic plan for the student. A student can have any number of 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.

**Requirement Term** Indicates the term in which academic advisement degree progress requirements apply to the student for this academic plan. Select the requirement term for the academic plan.

**Degree Checkout Status** The degree checkout status when you graduate the student.

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**Student Degree Number** The system displays this number sequentially after you complete the graduation process. This number also indicates the printing order if multiple degrees are conferred on the same date. The system prints degree information associated with the lowest number first.

**Completion Term** The term that the degree requirements were met. The system displays the completion term after you complete the graduation process.

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

*Include:* Ensures that all requirement groups that match this structure are pulled into an audit.

*Not Include:* Ensures that all requirement groups that match this structure are not pulled into an audit.

*Optional:* Pulls in requirement groups that match this structure, but does *not* prevent the overall audit from going complete if unsatisfied.

## Maintaining Student Academic Subplans

Access the Student Sub-Plan page (Records and Enrollment > Career and Program Information > Student Program/Plan > Student Sub-Plan).

**Academic Sub-Plan** Select the academic subplan for the student. A student can have any number of subplans within an academic plan. You can activate students into terms without the student having an academic subplan.

**Academic Sub-Plan Type** When you select an academic subplan, the system displays its corresponding type.

**Declare Date** The date that the student declares the academic subplan. 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.

**Requirement Term** Indicates the term in which academic advisement degree progress requirements apply to the student for this academic subplan. Select the requirement term for the academic subplan.

## Maintaining Student Additional Information

Access the Additional Information page (Records and Enrollment > Career and Program Information > Student Program/Plan > Additional Information).

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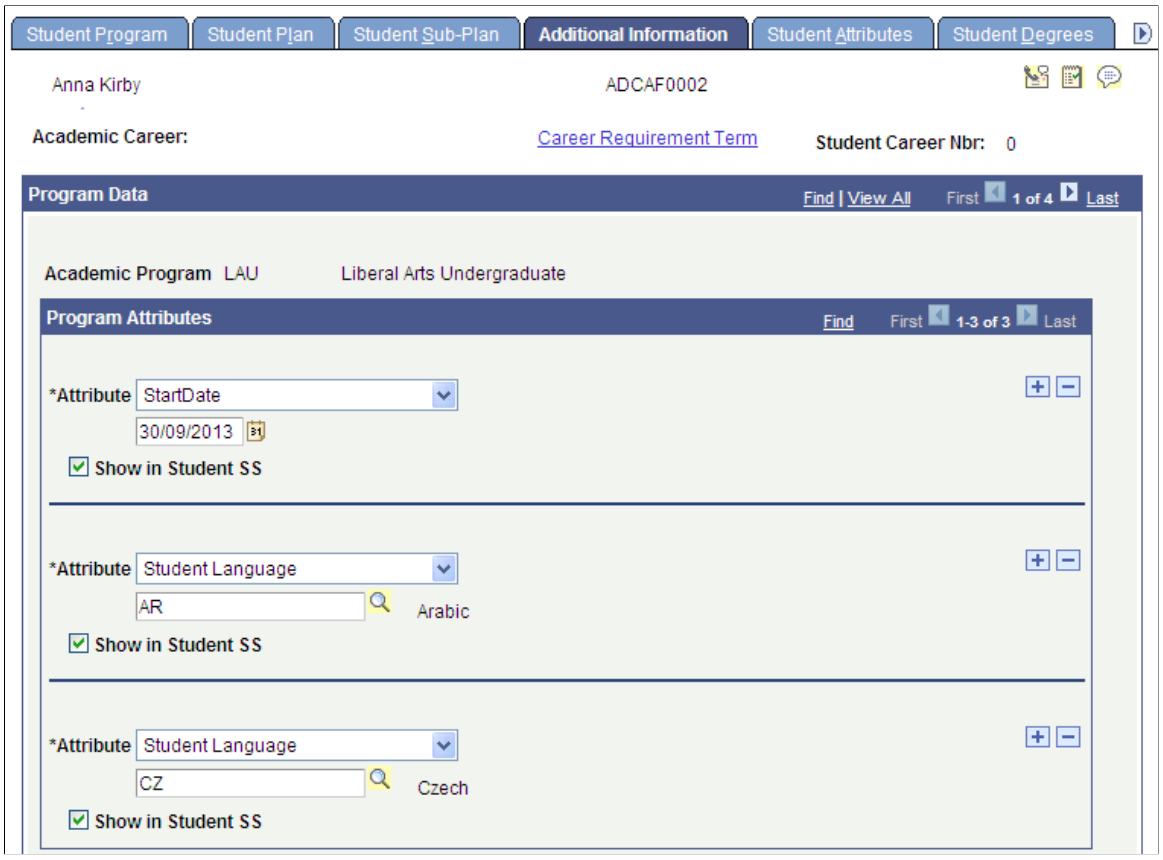
### Image: Additional Information page

This example illustrates the fields and controls on the Additional Information page. You can find definitions for the fields and controls later on this page.




Refer to the documentation about the Admissions Additional Information page before you read the following documentation.

See "Entering or Updating Additional Information" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

The following Record Contexts are delivered:

- ACAD_PROG (Attribute Record: SSR_PROG_CAF)
- ACAD_PLAN (Attribute Record: SSR_PLAN_CAF)
- ACAD_SUBPLAN (Attribute Record: SSR_SUBPLAN_CAF)

The Additional Information page is available only if you associate at least one attribute with one of the record contexts, using the Record Context page (Set UP SACR, Common Definitions, Common Attributes Setup, Record Context).

See "Defining a Common Attribute" (PeopleSoft Campus Solutions 9.2: Campus Community)

See "Associating a Common Attribute to a Record" (PeopleSoft Campus Solutions 9.2: Campus Community)

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### Defining Attributes for the Admissions/Student Records Program Stack

The Record Context allows you to set certain properties for a particular attribute in that context, including whether an attribute is repeatable or required.

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**Note:** When an attribute is set to required, then *from that point forward,* a value must be entered to save the component. If a user inserts a new effective dated row (or makes a change in correction mode) to records which pre-date the implementation of the Common Attribute Framework attribute, *the user must enter a value on the current row as well as any historical or future dated rows in order to save the component. For this reason, we strongly recommend that careful consideration be given when determining whether an attribute should be required.*

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Additionally if the required attribute is to be used in a web service, a value must be present in the request XML in order for the service to perform without error. For example, if an attribute field is defined as required on the ADM_APPL_PROG Record Context, then in AAWS that field would need to be required in the User Interface to collect a value allowing the SAD_SUBMITAPPL operation to complete successfully.

See "Understanding AAWS" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

For further information about how to set attributes to required or repeatable,

See "Associating a Common Attribute to a Record" (PeopleSoft Campus Solutions 9.2: Campus Community)

If the attributes set up for Admissions also exist on the Student Program/Plan stack, the values carry over during the Matriculation process.

See "Entering or Updating Additional Information" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions)

## (AUS) Entering Australia-Specific Student Program Information

Access the AUS Student Program page (Records and Enrollment > Career and Program Information > Student Program/Plan > AUS Student Program).

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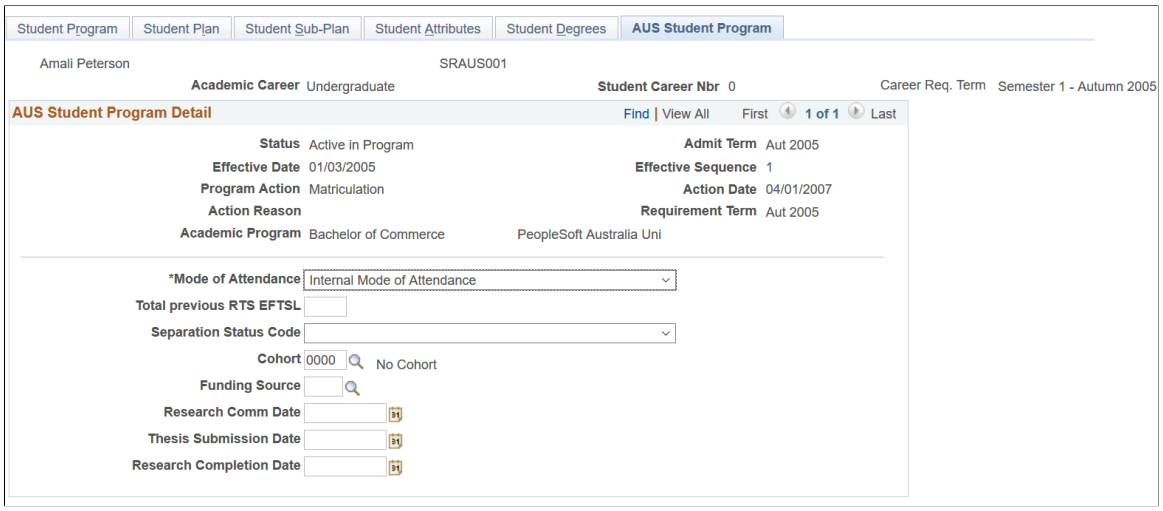
### Image: AUS Student Program page

This example illustrates the fields and controls on the AUS Student Program page. You can find definitions for the fields and controls later on this page.




**Mode of Attendance**

Assign a mode of attendance for reporting element 329 to DIISRTE in the Load Liability, Past Course Completions, Offer Details, and Preference Details Files.

Values are:

- *Completed Course - OLAA*
- *External Mode of Attendance*
- *Internal Mode of Attendance*
- *Multi-modal Mode of Attendance*
- *Submission of Original Work*

**Total previous RTS EFTSL** (total previous research training scheme equivalent full-time student load)

Enter any EFTSL amount for the student from a previous institution. This field is used only for research students who require a prior Research Training Scheme EFTSL to be reported to DIISRTE as element 460 in the student enrollment file.

**Separation Status Code**

Select the separation status code for higher degree research students.

This code is reported in the DIISRTE Enrollment file as element 465. If the field is blank, element 465 is reported as 9.

Values are:

- *Downgrade Doctorate to Masters*
- *Other*
- *Same level transfer*

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- *Upgrade Masters to Doctorate*

**Cohort**

Select a cohort for the student that the system can use as the default value when you enroll the student. The system populates this value by default on the Australian regional enrollment data and the field is available to tuition calculation for HECS or tuition fees if the Australian Regional Installation Settings are selected.

**Funding Source**

Select a funding source for the applicant to indicate the type of place being offered. The funding source can be mapped to the code reportable as element 724 in the DIISRTE Applications & Offers Collection.

See Generating the Applications and Offers Files.

**Research Comm Date** (research commencement date)

Enter the beginning date for a research student. This date works as an override for the Course of Study commencement date (element 534) in the DIISRTE Load Liability file. If this field is blank, the system determines the date from the admit term begin date.

**Thesis Submission Date**

Bundle 49. New field.

Enter the date on which the research student submits the thesis (element 591). This date is based on a student's first recorded thesis submission. Leave the field blank for those who are not higher degree by research students.

**Research Completion Date**

Bundle 49. New field.

Enter the date by which the research student completes the research (element 592). Leave the field blank for those who are not higher degree by research students.

See Defining Cohort Years.

## (CAN) Entering ESIS Student Program Data

Access the Cdn Student Program page (Records and Enrollment > Career and Program Information > Student Program/Plan > Cdn Student Program).

See Defining PSIS Student Program Data.


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