Adm

inistrator Initiated eDrop & eAdd Pair

Overview

This process will allow an administrator (in the ‘SR E Initiator 2 DA’ role) to initiate an electronic drop and add pair for a student. Rather than having a student walk a paper form around campus to obtain authorization signatures, the eDrop and eAdd documents are routed electronically to the same people who previously signed the forms. The electronic routing is called a path.

- eDrop and eAdd as a pair where the eDrop receiving an automatic grade of W is available through One.IU and will be useable beginning in the second week of classes through the last day to withdraw from a course with an automatic grade of W (“Auto W deadline”). The task in One.IU is labeled Late Drop Add Classes (Administrative). The task in One.IU for students is labeled Late Drop / Add Classes (after 1st week of classes).

- In exceptional cases, some campuses and programs allow eDrops later in the term (the day after the Auto W deadline through the fully graded date for the class, which is the WF period). In these cases, a grade of W or F may be assigned.

- The date used to update SIS is the date you, the administrator, submitted the request, irrespective of how long it takes to be approved.

- “Nodes” of approval are set at each campus, according to their academic policies. NOTE: If you are part of the route path for the document you initiated, you may be skipped due to the fact that you initiated the document (this setup varies by campus).

1. (WF only) Pre-academic authority workgroup (based on institution, student career, program, and plan). (Bloomington only)

2. Student academic advisor/advisor workgroup (based on student career, program, plan, and potential school/department usage of the SIS Advisor table)
   - Workgroups may include multiple individuals and when one takes action, the item is removed from the action list of all individuals within the workgroup.

3. If International student, routes to International Affairs workgroup

4. If Student-Athlete, routes to Student-Athlete advisor workgroup
   - Specs: USSC Student Group (Bloomington and IUPUI) or RS24, RS25, RS27, RS28, RS29, RS30, and RS31 Student Groups

5. (WF only) Pre-course authority workgroup (based on institution, class career, class subject, course prefix, catalog #, and related component). (Bloomington only)

6. (WF only) Instructor must assign a grade of W or F. The following instructor roles will receive the document in the action list: primary instructor, secondary instructor, associate instructor, and supervisory instructor. Only one instructor is required to take action on the document. After one instructor takes action, the other instructors cannot modify the document.

7. Course Authority – Department offering the course

8. (WF only) Pre-registrar workgroup (based on institution, student career, program, session, and term withdrawal). (Bloomington only)

9. Academic Authority – Dean of student’s school and Dual Program Authority – Dean of student’s school if in a dual program.

10. If a Special Session code (Non, NS1, NS2), it will route to Registrar workgroup for action. This allows the Registrar staff to assign appropriate grades and refund amounts, based on the actual dates of the class. The Registrar may also approve other drops based on each campus’ setup.
11. If not a special session or an eDrop in the WF period, once all approvals are secured, the students’ SIS enrollment will be automatically updated. If the eDrop is in the WF period, the document will go to EXCEPTION status and require manual processing by the Registrar’s Office. Then SIS will be updated.

- If a student is dropping his/her last class in the Fall or Spring term, it will also update student Term History pages with student withdrawal if this action is approved by the campus.

- Once approved and the SIS enrollment table updated:
  - Email confirmation is sent to the University email address of student
  - Registrar Office receives daily audit of activity along with error report of any problems to be addressed
  - Faculty rosters in One.IU are updated with drop activity (“W” grade)
  - Other notifications possible (for example, SF, FA, and Veteran’s Affairs)

**Steps**

Administrator Initiates an eDrop & eAdd as a Pair

1. Log into: one.iu.edu.
2. In the Search box, type “edrop” or “drop” and press ENTER.
3. Click on the Late Drop Add Classes (Administrative) task.
4. Enter the student’s EMPLID or Network ID.
5. Click Submit.

6. Select **Drop & Add (approved & processed as a pair)**.
Admin Initiate Drop/Add Pair Request

Name: Student, Ima
ID: 0000011111
Term: Fall 2007
Institution: Kokomo
Career: Undergrad
Program: Nursing-Assoc. Undergraduate (NSAA1)
Plan: Nursing ASN (NSAAASN)

Instructions:
Step 1: Select class to drop.
Step 2: Select class to add.
Step 3: Confirm & submit selections together.

- Your drop & add selections will be approved & processed together, as a pair.
- If either selection is disapproved or cancelled, the other will be automatically cancelled too.
- In other words, the drop request must succeed in order for the add to occur, and vice-versa.

7. Read the instructions and click continue.

Admin Initiate Drop/Add Pair Request

Please select a class to drop.

<table>
<thead>
<tr>
<th>Select</th>
<th>Course</th>
<th>Description</th>
<th>Class#</th>
<th>Day &amp; Time</th>
<th>Instructor</th>
<th>Units</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NURS-278</td>
<td>COGNIT/PERCEPTION/INTERACTION</td>
<td>6545 (Lecture)</td>
<td>MW 12:00PM-1:50PM</td>
<td></td>
<td>3</td>
<td>Eight Week - First</td>
</tr>
<tr>
<td></td>
<td>NURS-279</td>
<td>PERCEPT/INTERACTION:PRACTIC</td>
<td>6648 (Clinic)</td>
<td></td>
<td></td>
<td></td>
<td>Eight Week - First</td>
</tr>
<tr>
<td></td>
<td>NURS-317</td>
<td>BEGINNING/EVOLVING FAMILIES</td>
<td>6565 (Lecture)</td>
<td>MW 12:00PM-1:50PM</td>
<td></td>
<td>3</td>
<td>Eight Week - Second</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>6568 (Clinic)</td>
<td></td>
<td></td>
<td></td>
<td>Eight Week - Second</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>6517 (Activity)</td>
<td>MW 5:20PM-6:20PM</td>
<td></td>
<td>1</td>
<td>Eight Week - First</td>
</tr>
</tbody>
</table>

Note: Once approved, the date you submit this request will be the date used to drop the class. Refunds and grades will be determined based on that date.

Select the button for the course you would like to drop.

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8. Classes will display differently depending on the time period for the class:
   - If there are classes in both the Auto W (grade of W will automatically be assigned) and WF (instructor can assign a grade of W or F) periods available to drop, then the Auto W classes will display with a radio button next to each class, below the green bar with a message stating that the classes below will be assigned a grade of W when dropped. If only Auto W classes are available to drop, then this green bar will not appear on the document.

   The screen will look similar to this if there are classes in both the Auto W and WF periods available to drop:

   ![Screen shot of an example drop/add pair]

   - If there are any classes available to drop in the WF period, they will display without a radio button next to each class below a yellow bar. The yellow bar contains a message stating that the classes below require approval to drop and may result in a grade of W or F. You must click a link in this yellow bar to acknowledge that you have read and understand this message in order to select a WF class to drop.
The screen will look similar to this if there are only classes available to drop in the WF period:

<table>
<thead>
<tr>
<th>Select</th>
<th>Course</th>
<th>Description</th>
<th>Class#</th>
<th>Day &amp; Time</th>
<th>Instructor</th>
<th>Units</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AMID-X 373</td>
<td>INTERNSHIP IN PROF PRACTICE</td>
<td>5088</td>
<td>Ind Study</td>
<td>Shaffer, Janis Lynn</td>
<td>3</td>
<td>Eight Week - Second</td>
</tr>
</tbody>
</table>

Current total enrollment units for this term: 3.0

Note: Once approved, the date you submit this request will be the date used to drop the class. Refunds and grades will be determined based on that date.

• If there are any classes no longer available to drop, the Select column will display the dates the drop was allowed, “eDrop allowed MM/DD-MM/DD.”
  o Note: If the class is in a non-standard session (as specified by the campus) the Auto W period will be calculated based on the number of days the class meets. Each campus specifies the percentage of the class that is considered the Auto W period.

9. Click the radio button next to the class(es) the student would like to drop and click continue.
10. If you selected a class that could result in a W or F grade, you will see a pop-up confirming you understand that the student could receive a W or F grade.

11. Review the class selected to drop. If the incorrect class was selected by mistake, click **back** to return to the previous screen.

12. If the class selected is correct, enter the **class number** (4-5 digits) of the class you would like to add. **NOTE:** The Search function is the same as the Self-Service class search in SIS. It is only available to term activated students. If you are a term activated student, then you will be able to use this. If not, you will have to look up the class number in SIS and then enter it here.

13. Once you have entered the class number, click **continue**.
Administrator Initiated eDrop & eAdd Pair

Admin Initiate Drop/Add Pair Request

- Name: Student Name
- ID: 00000111
- Term: Fall 2007
- Institution: Kokomo
- Career: Undergrad
- Program: Nursing-Assoc. Undergraduate (NSAA1)
- Plan: Nursing AEN (NSAEN)

Please confirm that you want to DROP this class:
NURS-A 286 BEGINNING/EVOLVING FAMILIES, Units: 3.0, Eight Week - Second
- Lecturer: 8655
- Instructor: Debra Sue Whitson
- Day & Time (Location): Meeting Dates
  - 12:00 PM 2:50 PM MW (KOMNISS) 10/15/2007-12/14/2007

Also, confirm that if the drop succeeds, you want to ADD this class:
CHEM-C 105 PRINCIPLES OF CHEMISTRY I, Units: 3.0, Regular Academic Session
- Lecturer: 9360
- Instructor: Marcia L
- Day & Time (Location): Meeting Dates
  - 8:30 AM-9:45 AM TuThF (HUNT116) 08/20/2007-12/14/2007

If this and any pending requests are approved, total enrollment units for this term will be: 11.0

Please acknowledge the following:
- Student has requested initiation of this request.
- Faculty approval to add this course has been obtained (verbally, email, paper form, etc.)

I acknowledge the conditions above.

Learning Management

Study List for Kokomo, Fall 2007:

<table>
<thead>
<tr>
<th>Status</th>
<th>Course</th>
<th>Description</th>
<th>Class#</th>
<th>Instructor</th>
<th>Units</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolled</td>
<td>NURS-A 276 COGNITN/PERCPTN/INTERACT: 8648</td>
<td>Lecture</td>
<td>3</td>
<td>First</td>
<td>Eight Week - First</td>
<td></td>
</tr>
<tr>
<td>Enrolled</td>
<td>NURS-A 276 COGNITN/PERCPTN/INTERACT: 8648</td>
<td>Lecture</td>
<td>2</td>
<td>First</td>
<td>Eight Week - First</td>
<td></td>
</tr>
<tr>
<td>Enrolled</td>
<td>NURS-A 286 BEGINNING/EVOLVING FAMILIES 8655</td>
<td>Lecture</td>
<td>4</td>
<td>Second</td>
<td>Eight Week - Second</td>
<td></td>
</tr>
<tr>
<td>Enrolled</td>
<td>NURS-A 287 BEGIN/EVOLVING FAMILIES PRACT 8658</td>
<td>Clinic</td>
<td>3</td>
<td>Second</td>
<td>Eight Week - Second</td>
<td></td>
</tr>
<tr>
<td>Dropped</td>
<td>NURS-A 102 GROUP EXERCISE 8517</td>
<td>Activity</td>
<td>(4)</td>
<td>First</td>
<td>Eight Week - First</td>
<td></td>
</tr>
</tbody>
</table>

- Note that the net credit hour total is reflected.
- Note that the date used for processing the add will be the date the request is submitted.
  Fees will be determined based on that date.
- You will be asked to confirm the requested drop/add.

14. If your campus obeys the class limit and doesn't automatically allow students to add full classes, you will see the enrollment information for the class you are attempting to add. If the Class Limit is equal to the Projected Enrollment, be advised that you may not be allowed to add this class since it is full. You can try to add the class, but it will be up to the instructor or department whether or not they allow you into the class.
15. Select the **I acknowledge the conditions above** checkbox.

Note that if you are submitting a request to drop a course in the WF period, you will be asked to acknowledge that you understand that this drop could result in a grade of W or F. Once this checkbox is selected, the `submit for approval` button will be enabled.
16. Add a reason for dropping the class. If your campus requires a drop reason be entered, you will see the **REQUIRED: Enter drop reason below** text box. Note that if you are submitting a request to drop a course in the WF period, this text box will be labeled with a message stating “REQUIRED: Enter the reason for dropping the class that may result in a grade of W or F. This note will appear on all classes dropped. If you have different reasons for dropping multiple classes, please specify the class with each reason.”

17. Click .

<table>
<thead>
<tr>
<th>Admin Initiate Drop/Add Pair Request</th>
<th>Document ID: multiple (see below)</th>
<th>Status: ENROUTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiator: kkade</td>
<td>Created: 2007-09-10 09:07:20.0</td>
<td></td>
</tr>
</tbody>
</table>

**Name:** Student Name  
**ID:** 0000011111  
**Term:** Fall 2007  
**Institution:** Kokomo  
**Career:** Undergrad  
**Program:** Nursing-Assoc. Undergraduate (NSAA)  
**Plan:** Nursing ASN (NSAAASN)

Your DROP & ADD requests have been submitted. They will be approved & processed as a pair.

**DROP request:**
NURS-A 286 BEGINNING/EVOLVING FAMILIES, Units: 3.0, Eight Week - Second  
Component | Class# | Instructor |
--- | --- | --- |
Lecture | 6555 | Horoho, Debra Sue Whitson |

**ADD request:**
CHEM-C 105 PRINCIPLES OF CHEMISTRY I, Units: 3.0, Regular Academic Session  
Component | Class# | Instructor |
--- | --- | --- |
Lecture | 8166 | Gilliatte, Marcia L |

If this request and any other pending requests are approved, total enrollment units for this term will be: 11.0

**Notes:**
- Created By: kkade  
- Date/Time: 09/10/2007 09:07:07  
- Note: Student needed to drop the class to get a part-time job.

**Learning Management**

**Study List for Kokomo, Fall 2007:**

<table>
<thead>
<tr>
<th>Status</th>
<th>Course</th>
<th>Description</th>
<th>Class#</th>
<th>Instructor</th>
<th>Units</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>enrolled</td>
<td>NURS-A 279 COGNITIVE/PERCEPTION/INTERACTION</td>
<td>6545 (lecture)</td>
<td>2</td>
<td>Eight Week - First</td>
<td></td>
<td></td>
</tr>
<tr>
<td>enrolled</td>
<td>NURS-A 279 PERCEPT/INTERACTION/PRAC/INTER</td>
<td>6545 (Clinic)</td>
<td>2</td>
<td>Eight Week - First</td>
<td></td>
<td></td>
</tr>
<tr>
<td>enrolled</td>
<td>NURS-A 287 BEGINN/EVOLVING FAMILIES, PRACT</td>
<td>6550 (Clinic)</td>
<td>2</td>
<td>Eight Week - Second</td>
<td></td>
<td></td>
</tr>
<tr>
<td>pending add (this doc)</td>
<td>CHEM-C 105 PRINCIPLES OF CHEMISTRY I</td>
<td>6060 (lecture)</td>
<td>3</td>
<td>Regular Academic Session</td>
<td></td>
<td></td>
</tr>
<tr>
<td>pending drop (the doc)</td>
<td>NURS-A 286 BEGINN/EVOLVING FAMILIES</td>
<td>6555 (lecture)</td>
<td>(3)</td>
<td>Eight Week - Second</td>
<td></td>
<td></td>
</tr>
<tr>
<td>dropped (W)</td>
<td>HPER-E 102 GROUP EXERCISE</td>
<td>8517 (Activity)</td>
<td>(1)</td>
<td>Eight Week - First</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Note that if both Auto W and WF classes were available to drop, then the green bar will display above Auto W classes and the yellow bar will display above WF classes.
The screen will look similar to this if a class in the Auto W period was selected to drop:

18. Click **print** to print a copy of the page for future reference.

19. To drop/add another class click **create another request**. If you are finished, click **close window**.

**NOTE:** It is important to note that for eDrop, the process is the same as if a student were initiating the document. **However, for eAdd, an administrator-initiated document will skip the instructor node so the administrator must already have instructor approval.** After that, the routing is the same as if the student had initiated the document.
Check Status of eDoc

1. To check the status of an eDoc in One.IU, go to one.iu.edu and in the Search box, type “document search” and press ENTER.
2. Click the Document Search (Kuali Rice) task. The Document Search page will display.

3. Enter the Document Id and click Search to view the document and route path. For more detailed information, see the Advisor/Approver eDrop job aid and the Instructor/Approver eAdd job aid.

Note: Both of these documents will be processed only after they have both been approved. If one document is approved, but the other is disapproved or cancelled, neither document will be processed.

Other Information

No available classes to Drop
If the student does not have courses that are available to be dropped via the system at the time of the request, you will get the following message:
Administrator Initiated eDrop & eAdd Pair

Student is Not Enrolled
If the student is term activated, but not enrolled, you will see the following message when you try to add a class.

Enrollment at Two Campuses or in Two Careers at the Same Campus
If the student is enrolled at two campuses or in two careers at the same campus, he/she will see a page prior to the Class selection page.

Once you select the appropriate Institution/Career and click continue, the Class Selection page will be displayed and you can follow the steps above to drop a class.

Additional Information:
- The operator ID, creation date, and comment text are stored.
- The final approval date is stored even though it is not displayed.
- Unlike administrator initiated eAdd documents, eDrops in the WF period will always route to the instructor for a grade. The instructor node cannot be skipped. If a grade isn’t assigned, the document will go to EXCEPTION status for manual processing.