**Advisor/Approver - Electronic Drop (eDrop)**

### Overview

This process will allow a student to electronically drop a class. Rather than having a student walk a paper form around campus to obtain authorization signatures, the eDrop document is routed electronically to the same people who previously signed the forms. The electronic routing is called a path.

- An 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 Auto W deadline on the student’s campus. 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).
- Some campuses and programs allow eDrops later in the term (the day after the Auto W deadline through the drop with greater penalty date for the class, which is the WF period). These are exceptional cases. In these cases, a grade of W or F may be assigned.
- The date used to update SIS is the date the student 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.

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
   - Specs: VISM Student Group code and transaction will drop student below fulltime
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. The instructor/s on the enrollment component of the class are notified for all classes. 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. If the student is dropping his last class/es (resulting in a term withdrawal) and requires an override to the refunds, assign the drop reasons as usual within eDrop, then contact your campus Bursar to ensure that the term withdrawal reason is adjusted to reflect the appropriate refund. The Registrar may also approve other drops based on each campus’ setup.
11. Once all approvals are secured, the student’s SIS enrollment will be automatically updated.

   **Note**: eDrop/eAdd pairs where the drop is in the WF period do NOT update SIS enrollment. These documents go to exception and require manual processing due to varied campus policies and procedures.

- If student is dropping his/her last class, it will also update student *Term History* pages with student withdrawal if this action is approved by the campus. (See note in #10 above regarding refunds for a term withdrawal.)

- Once approved and SIS enrollment table updated:
  - Email confirmation sent to 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 updated with drop activity and “W” or “F” grade
  - Other notifications possible (for example, SF, FA, and Veteran’s Affairs)

**Steps**

**Advisor/Approver Action**

1. Log into one.iu.edu.
2. In the Search box, type, “action list” and press ENTER.
3. Click the Action List (Kuali Rice) task icon.

   **Note**: Instructors can also access eDrop and eAdd documents pending action in Canvas on the dashboard or course home page. See more details in the Additional Information section of this document.

   Your Action List will display.

4. The initial sort is by Document Id. You can sort this page by any of the links at the top of the list (Id, Type, Title, Status, Action Requested, Initiator, etc). To sort, double click on the underlined title of the column and the list will sort by that column.
The **Initiator** column displays the student’s name.

The **Title** column contains pertinent information specific to the request, which may help in sorting and filtering a list among the workgroup. The title includes the institution, career, program and plan of the student submitting the request. It also includes the course subject and catalog numbers of the course in review.

Note that the **Action List** can be color coded if the user sets color preferences in the **User Preferences** window.

5. If you would like to see the individuals in a **Workgroup**, click on the Workgroup link in the **Group Request** column (for example, SIS.EA.REGR).

6. Click on the **Log** icon for details of when the request was submitted. It also provides other information related to the document.

7. Close the window to be returned to the Action List.

8. From the **Action List**, click on the document **Id** to access the request. Note that an eDrop
document for a class that is being dropped after the Auto W period will be slightly different from a standard eDrop Request (see screenshots for details).
9. Once the document is retrieved, you need to review it to determine whether approval may be granted. Standards for approval/non-approval are the same as those used with the paper-driven process.

- A link to the **Administrative Center** is available if you need additional information prior to making a decision. Clicking on this link brings up the Administrative Center screen with the EMPLID pre-populated.

- **Drop class request**: Reflects drop requested and is put into context with the student’s entire class schedule listed below.

- If class was dropped after the Auto W period, **Assign Course Grade** field may be used by instructor to assign a grade.
The screen will look similar to the image below if the student is requesting a drop during the WF period.

If a grade has already been assigned, it will be displayed as a read-only field on the document to all approvers who are not authorized to assign a grade. See image below.
• **Add Note** field may be used by approver. The note will be returned to the student along with a message about whether the request was approved or not approved. Notes should always be used if disapproving or cancelling a request to explain to the student the reason for such action. Note that **Notes** are visible to anyone on the route path, including the student as mentioned above. Do not enter any information that should not be considered part of the academic record, to be viewed by personnel in the academic departments, schools or the Offices of the Bursars, Financial Assistance and/or the Registrar.

• **Notes** that have been previously submitted by the student or other reviewers also appear.

• **Study List** is available so the advisor has all relevant course/degree progress information available.

• **Net units** are calculated.

10. If the document is ready for approval, click [approve]. If not, you may place the document in a "hold" status by clicking [hold]. It may also be disapproved at this level, which will nullify the
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document and return it to the initiator.

- **approve** = advisor approves action and submits for next level of approval or update to SIS.
- **disapprove** = advisor disapproves action and notification of that action will be returned to the student via the action list. A note will be important here to advise the student as to rationale and possible alternative actions.
- **hold** = advisor has reviewed, but is not ready to take action.
  
  o If the advisor chooses to use the action of **hold**, the following message will be displayed: "You have placed this request on hold. The document has been marked with your username in the action list."
  
  o If an individual in the workgroup takes this action, others in the workgroup will see the advisor’s username next to this **Document ID** when they view their **Action List**. "Holding" a document does not lock others from accessing the document nor does it prevent anyone else from taking action.

11. Once the document is approved, the following will be displayed.

*The screen will look similar to this after an approval on a drop during the Auto W period:*

<table>
<thead>
<tr>
<th>eDrop Request</th>
<th>Document ID: 1077855</th>
<th>Status: ENROUTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiator: istudent</td>
<td>Created: 2007-08-13 14:24:22.0</td>
<td></td>
</tr>
</tbody>
</table>

**Student’s Name:** Student, Inna
**ID:** 8000011111
**Career:** Undergrad
**Program:** University Div Undergraduate (UDIV1)
**Plan:** Nursing BSN (NR5R/NBSNP)

**DROP CLASS REQUEST:**
**CSCI-A 110 INTRO TO COMPUTERS & COMPUTING**, Units: 3.0, Twelve Week

<table>
<thead>
<tr>
<th>Component</th>
<th>Class#</th>
<th>Instructor</th>
<th>Day &amp; Time (Location) Meeting Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture</td>
<td>6415</td>
<td>Doe, Jane</td>
<td>05/14/2007-08/13/2007</td>
</tr>
</tbody>
</table>

If all pending requests are approved, total units for the term will be: 5.0
Minimum enrollment units for this term: 0.0
Maximum enrollment units for this term: 10.0

**The request has been approved.**

**Add Note (viewable by student)**

This message will be displayed letting you know the request has been approved.

12. (Auto W only) The final approval based on campus-specific requirements (refer back to page 1) will send the drop request to the SIS enrollment engine or the Registrar’s office for processing. Consequently, the course will be dropped with a grade of **W**.

(WF only) A grade of either **W** or **F** will be assigned by the instructor in the route path of the document and the final approval will send the drop request to the Registrar’s office for processing.

In addition, an email is automatically generated to the student, informing him/her of the successful
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completion of the drop request as well as providing the document ID.

If the drop request is **Disapproved** or **Canceled**:
- The SIS Enrollment Table will **not** be updated.
- Activity will be written to the audit table maintained by the Registrar.
- Notification email will be sent to the student for a disapproval, but not a cancellation.

**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.
- Instructors can access eDrop and eAdd documents pending their action in Canvas on the course home page or the dashboard. The number of pending eDrop WF documents will be listed as “students waiting to withdraw.” eAdds will be listed as “students waiting to add.”

- The IUIE report SR Workflow Aged Items (IE_SIS_SR_WRKFLOW_AGED_ITEMS) reflects items that are still sitting in an action list and it will show the name of the individual who needs to take action. This report can be used to monitor the action lists of staff in the departments.
- If the drop is assigned a grade of F, the process requires two steps in SIS. On a single enrollment request, the class must be dropped, then a second row is added to change the grade to an F.
  - If the grade change fails, the class will be re-added and the document will go to EXCEPTION status. Notes will be added to the document explaining what happened.
- If an approver overrides the action date and the instructor assigns a grade of F, the document will go to EXCEPTION status. A superuser must determine if the new action date is still in the W or F period and process the drop manually in SIS or if the document should be disapproved because the new action date is before the drop with greater penalty date when a grade of F is not valid.