Student Records
Updating a Historical Program/Plan Stack

Overview

This process will show how to update a historical program/plan stack.

NOTE: Be sure that your User Defaults are set for the Institution field. Within the Program/Plan Stack pages, if Institution is not defaulted, the program action/reason codes may not be available and/or your updates may not save properly.

Steps

Updating a Historical Program/Plan Stack

1. Navigate to: Records and Enrollment > Career and Program Information > Student Program/Plan.

2. Enter the student's ID if known or search by Last Name and First Name.

3. Select the Include History and Correct History check boxes.

4. Click Search.
5. Review summary to determine which program/plan stack needs to be modified.

6. In this example, the student is being moved from BL program=EDUC to program=GRAD effective for Fall 2005 (4058). The BL Graduate Career 1 hyperlink was selected.

7. Switch to View All mode.
8. Review the effective dates for the different rows within the stack (career number).

In this example, the bottom (first, or oldest) row is dated 03.16.2005 with a program of graduate level Education (Education Graduate). The next row going up, or the more recent row, is for an Education plan within the Graduate School (Education-GrSch), with an effective date of 04.09.2008. The update request is to backdate the change to Education-GrSch to the start of the Fall Semester 2005 term. SIS term = 4058. Effective date = 08.29.2005.

9. Rekey the new effective date (this example = 08/29/2005) in the Effective Date field of the top row, associated with the correct program of Education-GrSch.

10. Enter the Admit Term associated with the new effective date (for example, 4058). Tab out of the field.

11. Rekey the existing value in the Requirement Term field. Tab out of the field.

12. Click Save.

Verify the Update on the Term Activation Page

1. Navigate to: Records and Enrollment > Student Term Information > Term Activate a Student.

2. The student’s ID should be carried forward. If not, enter the student’s ID.

3. Click Search.

4. Click View All.
5. Scroll down to the term activation for the new “effective term” applied in the previous screens. For example, the new effective term was 4058, with an effective date of 08/29/2005. The records were scrolled to find term 4058 (Fall 2005). It now shows a program of Education GrSch. The prior term on record, listed below, of 4055 (Summer 2005) remained as Education Graduate. The update was appropriately applied.